



# Colorado Case Management Redesign

## Coaching For Client Success: Fundamentals of Coaching for Case Managers

August 22, 2023

HEALTH MANAGEMENT ASSOCIATES

# Public Meeting Notice

- Please note this meeting is open to the public and is being recorded.
- Anything said during this meeting may be part of the Public Record.
- We will not discuss the CMA RFP or related issues; please direct your questions about the CMA procurement to HCPF.

# Presenters



**Deborah Rose,  
Associate Principal**



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Senior Associate**



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Principal**

# Agenda

- Introductions, Recording & Meeting Guidelines (5 min)
- Poll: Who is here? (2 min)
- Presentation: Coaching for Member Success (33 min)
  - Roles and skills of a Coach
  - Fundamentals of Coaching – Attitude and Approach: “The Secret Sauce”
  - Supporting change through coaching
- Breakout (8 min)
- Discussion (2 min)



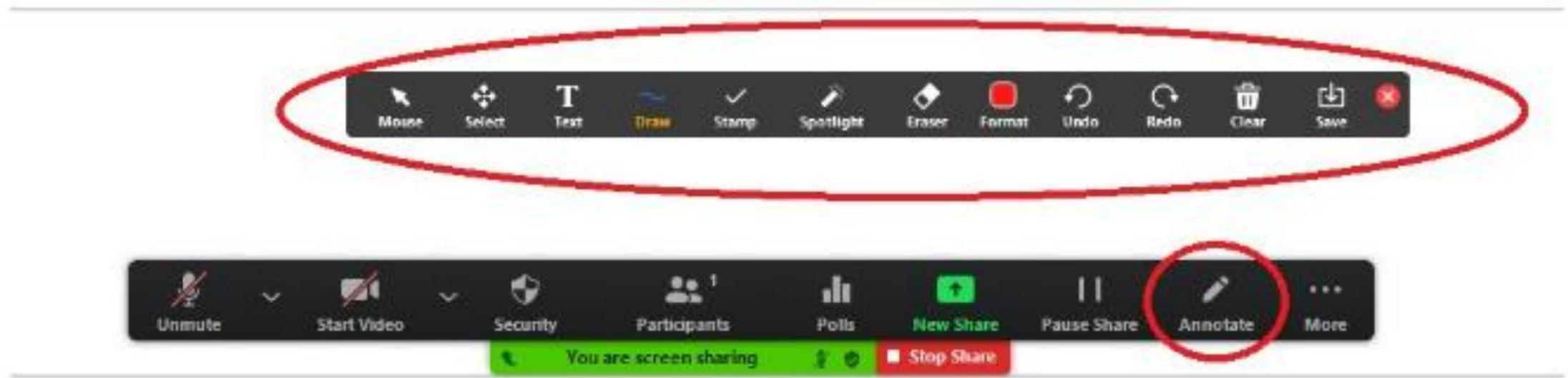
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# Poll: Who Is Here Today?



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# Annotate



# What's a Coach?

# What is a Coach?

- **Cheerleader (motivator, inspirer)**
- **Champion**
- **Advocate**
- **Convenor and Facilitator**
- **Broker**
- **Subject Matter Expert**
- **Improvement Guide**
- **Sounding Board**
- **Agenda Setter/Task Master**
- **Problem Solver**
- **Anything else?**



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# Case Management and Coaching

- Both are based in rapport and relationship
- Both have a course of work with goals

## Case Management

- You are the subject matter expert – professional advice and ability to bring resources and information
- Assessment, problem solving, educating, supporting

## Coaching

- Your expertise is in facilitating, supporting change and building client empowerment – the answers come from the client
- Subject expertise is a plus

# Core Coaching Principles



**Relationship-based**



**Member sets the agenda**



**Content smart...but most importantly, wise**



**Facilitation of learning and change, not instructing or doing**

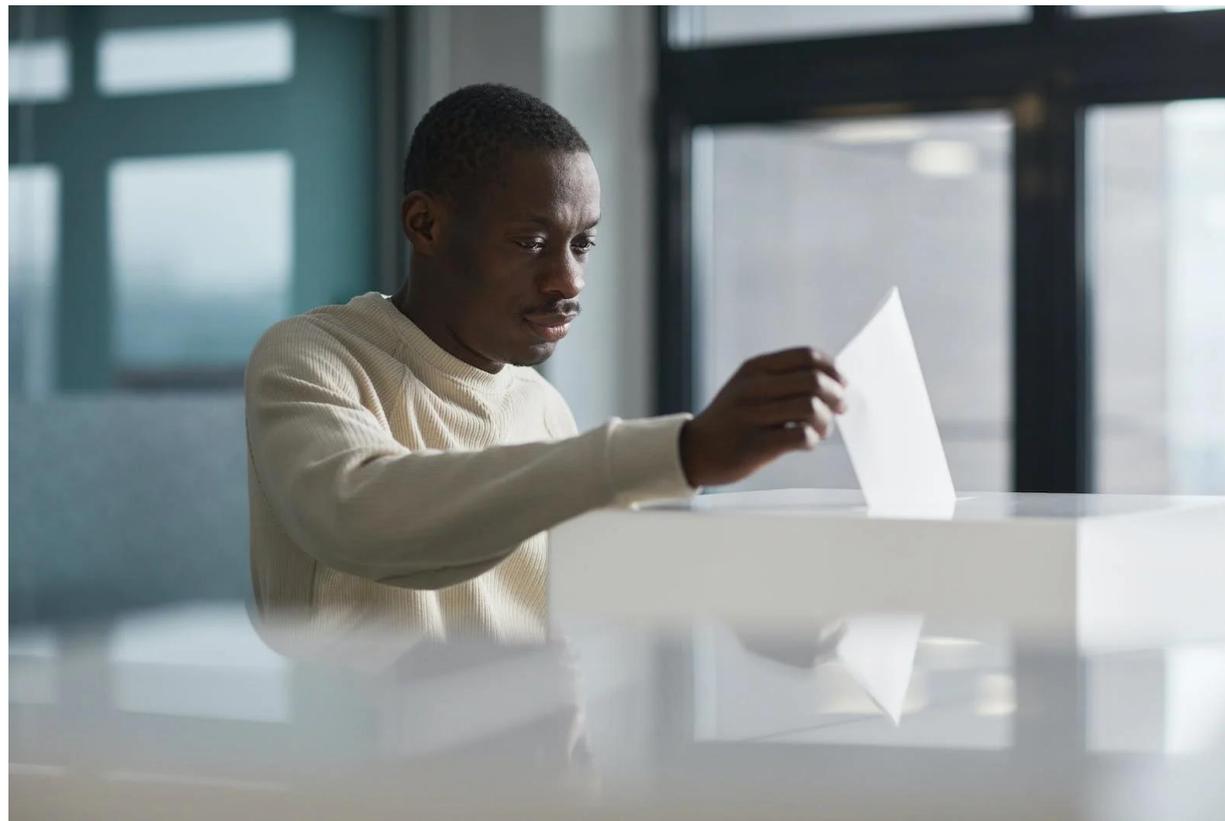


**Be an agent of change**



**Outcome of coaching is change or action**

# Poll



# Supporting Change - Coaching

Change requires a  
change in belief,  
value, attitude, or  
habits or behavior

# Supporting Change Through Coaching

## Adaptive

- The change in behavior needed to address the goal(s) is complex
- Need to change/address deeply held beliefs and values
- Change means can't continue business as usual and loss is an inherent part of the process (something's gotta give)

## Technical – Problem Solving/Information Sharing

- Problem is well-defined
- Solutions are available with the right targeted information and/or resources
- Path forward is clear

# Adaptive Change: The People Part of Coaching

- **How do you build a relationship?**
- **Be authentic**
- **Care (have to really care)**
- **Convey respect (have to really feel respect)**
- **Be proactive in anticipating needs and concerns**
- **Be reliable and trustworthy – show up; do what you say you will do**
- **Listen more than you talk**
- **Stay aligned with the mission; Keep your focus on the “why” and the “who”**



Relationship-based

# Motivation For Change

- **MOTIVATIONAL ENGAGEMENT**
- **We use motivational engagement and interviewing to help clients adopt healthier more adaptive habits and behaviors.**
- **Define success**
- **Achieve success – measure it**
- **Support it for sustainability**



# Resistance...

<b>IS</b>	<b>IS NOT</b>
<b>Inevitable and emotional response</b>	<b>Necessarily logical</b>
<b>A natural function of disruption</b>	<b>A sign of disloyalty</b>
<b>Manageable</b>	<b>Something to overcome or combat</b>
<b>An attempt to protect or defend the individual and protect them from harm</b>	<b>Aimed at you or to be taken personally</b>
<b>A sign that the potential for change exists. An indirect expression of underlying concern</b>	<b>Designed to discredit your competence, despite the words being used</b>
<b>Attempting to control the change process</b>	<b>Indicative of poor performance</b>
<b>A learning process</b>	<b>A sign that the change process is out of control</b>

# Most Common Mistakes in Responding to Resistance

Attempting to change  
the member's view  
with "logical"  
arguments about why  
they should change

Dealing with the  
person; not the issue

Ignoring the  
member's emotions  
and behaviors  
concerning the  
change

Assuming what is  
"logical" to you is  
logical to the member

Giving up or not  
repeating the process

# Effective Behaviors in Approaching Resistance

- **Create rapport. Build strong working relationships**
- **Establish expectations and provide context**
- **Explain the change in terms of the member's "What is in it for me" baseline (MI)**
- **Establish the source of resistance from the member's point of view**
- **Ask open-ended questions - support and invite open expression**
- **Occupy less than 25% of the airtime - be quiet and listen**
- **Create WIN-WIN situations**
- **Repeat the resistance management process**



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# Fundamentals of Coaching: Being Present

- **What is “beginners mind”?**
- **Approach the world through a beginner's eyes. From the original Shoshin (Zen Buddhism).**
- **Look at every situation you're placed in as if it's the first time you are seeing it.**
- **Not burdened with preconception and past experience and less guided by what you “know” to be true (children)**
- **Effective coaches are smart and humble at the same time**



# Fundamentals of Coaching: Balance

- **Members sets the goals and agenda; Facilitate learning and change, not instructing or doing --- while building relationship**
- **Balance expertise and “beginners mind”**



# Fundamentals of Coaching: Humility

- Being humble
- Cultural humility
  - *I know there are things I don't know about you and your experience. I don't expect you to teach me but I am committed to learning*



# Coaching for Change

- Are we earning \$8 per day?
- Are we running a jackhammer?
- Or are we building a national monument?



# Staying in touch with your “Why”



# What is your “Why”?

# You've got this!



# Upcoming Learning Collaboratives

- **Let's Get Brave Together:  
Courageous Conversations about  
Gender Identity and Sexual  
Orientation**
  - September 12, 2023, 12:00-12:50 pm MT
- **Meditation**
  - October 12, 2023, 11:00-11:50 am MT
- **Dignity of Risk**
  - November 16, 2023, 1:00-1:50 pm MT



# Contacts

Please contact us if you have additional questions, suggestions, or ideas.

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# Thank You

