Coaching for Capacity: An emerging need

Care That Fits 2022
How can we recognize patients as a part of their own health care teams and leverage skilled coaches to organize care in pursuit of Minimally Disruptive Medicine (MDM)?
Learning Objectives

1. Describe how coaching may be a tool to resolve a patient’s workload-capacity imbalance.


3. Demonstrate how to use one of the four techniques outlined in OARS.
Descriptions

**Minimally Disruptive Medicine or Healthcare:** A model of care focused on pursuing patients’ goals with the least possible healthcare footprint on their lives.

**Coaching:** Application of a particular set of skills that elicits meaningful engagement; a valuable communication style. *Learning cooking skills does not make me an executive chef.*

**Coaches:** Certified Health and Wellness Coaches; an evidence-based profession with a job task analysis; uses knowledge and skills evaluated based on standards. *Coaches do not diagnose, interpret behavior or beliefs, or clinically advise patients on what to do.*
Meet ‘Pam’

Lives with:

- Liver disease
- Diabetes
- Allergies
- Depression
- Knee and elbow injuries
- Obesity
- Hearing impairment
- Hernia surgery
Meet ‘Pam’

Lives with:
- Liver disease
- Diabetes
- Allergies
- Depression
- Knee and elbow injuries
- Obesity
- Hearing impairment

Also lives with:
- Family (husband, 1 son at home)
- 3 other, adult children (2 with mental illness)
- Spouse has chronic conditions
- Full-time employment
- Commitment and enjoyment of church
- A passion for creative hobbies
‘Pam’

- Time with daughters brings joy.
- Enjoys exercise, reading.
- Husband encourages going to exercise class.
- Values and enjoys church.

- Quality time missed both at home and socially (because ill / unwell or monitoring symptoms).
- Time lost at work + use of PTO (ill, appointments).
- Sleep negatively impacted by managerial work /

- Grief over missing enjoyable activities (exercise classes, crafts)
  “I don’t feel like I get enough support.”

- Fractured care; conflicting advice between providers and condition management.
The work of being a patient

Sense-making work

Organizing work and enrolling others

Doing the work

Reflection, monitoring, appraisal
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Cumulative Complexity Model

Capacity Coaching: A New Strategy for Coaching Patients Living With Multimorbidity and Organizing Their Care
Kasey R. Boehmer, PhD, MPH, Nicole M. Guerton, MS, Jason Soyring, BS, Ian Hargraves, PhD, Sara Dick, MS, Victor M. Montori, MD, MSc
Capacity

resources and limitations influencing the ability of patients to do the work of healthcare and life

socioeconomic
psychological
social support
literacy
pain
stress
attitudes
beliefs

Barakat S et al PHM 2018
“Health & wellness coaches partner with clients seeking to enhance their well-being through self-directed, lasting changes, aligned with their values. [HWCs] display an unconditional positive regard for their clients and a belief in their capacity for change, honoring the fact that each client is an expert on their own life, while ensuring that all interactions are respectful and non-judgmental.”

https://nbhwc.org/
Resources

Mayo Clinic Coaching Model

Appreciative Inquiry
Biography

Resources

Environment

Work

Social

Workload

Capacity

Boehmer K et al BMC Fam Prac 2016
Barakat S et al PHM 2018
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Adapted from Boehmer, 2019, Mayo Clinic Proceedings
Capacity Coaching

- Works 1:1 with patient toward goals created by or co-created by patient

  AND

- Specifically developed to meet the challenges of living with and treating multimorbidity
- Innovative, ideally occurs within patient’s health care team rather than outside of the team
- Use tools such as My Life, My Healthcare discussion aid along with other coaching tools
<table>
<thead>
<tr>
<th>HWC task</th>
<th>Modification for Capacity Coaching</th>
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<tbody>
<tr>
<td>Assist the client in creating a description of their ideal vision of the future</td>
<td>Use ICAN Discussion Aid to assess life (biography) and treatment plan fit. Assist patient in describing areas of challenge and success with fit</td>
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<tr>
<td>Establish or identify the present situation, past history, previous successes and challenges, resources, etc associated with the client's vision</td>
<td>Use ICAN Discussion Aid to identify the present situation, past history, previous successes and challenges, resources, etc associated with good or poor fit between life and care</td>
</tr>
<tr>
<td>Explore and evaluate the client's readiness to progress toward the vision</td>
<td>Explore and evaluate areas in which patient's capacity can be increased and readiness to progress in that direction. Explore and evaluate areas in which patient's care team can reduce treatment burden. Communicate those to appropriate team members</td>
</tr>
<tr>
<td>Invite the client to identify and explore patterns, perspectives, and beliefs that may be limiting lasting change</td>
<td>Invite the patient to identify and explore patterns, perspectives, and beliefs found within their own biography, environment, and social networks that may be limiting lasting change</td>
</tr>
<tr>
<td>Work with the client to establish goals that will lead to the vision</td>
<td>Work with the patient to establish “experiments” that will lead toward better treatment/life fit</td>
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<td>Work with the client to develop a series of steps that will lead to the achievement of client-selected goals</td>
<td>Work with the patient to break down experiments into smaller steps if needed</td>
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<td>Elicit the client's commitment to and accountability for specific steps</td>
<td>Support and develop patient capacity to undertake experiments. Work with health care team toward commitment to reducing areas of patient treatment burden</td>
</tr>
<tr>
<td>Collaborate as the client evaluates success in taking steps and achieving goals</td>
<td>Collaborate with patient and health care team to evaluate success in taking steps toward achieving life/treatment fit and increasing patient's capacity for self-care</td>
</tr>
<tr>
<td>Work with the client to maintain progress and changes</td>
<td>Work with the patient and the health care team to maintain progress and changes</td>
</tr>
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LIVE DEMONSTRATION
My Life My Healthcare
How does your healthcare fit with your life?

Are these areas of your life a source of satisfaction, burden, or both?

- Leave blank if not part of your life
- My family and friends
- My work or finances
- Free time, relaxation, fun
- Spirituality or life purpose
- Where I live
- Getting out and transportation
- Being active
- Social media, TV or screen watching
- My emotional life
- My memory or attention
- The food I eat

What are the things that your doctors or clinic have asked you to do to care for your health?

- Leave blank if not part of your life
- Take medications
- Monitor symptoms
- Manage my diet and exercise
- Get enough sleep
- Come in for appointments or labs
- Reduce alcohol use, smoking, etc.
- Insurance or support services
- Manage stress

Support groups (el anon, parenting)

What are you doing to manage your stress?

Exercise (walk dog, strength train), bath or hot tub, podcast, Bible study

Where do you find the most joy in your life?

Playing with my son, being outside, productive/constructive activity, meaningful quality time with friends or family

What else is on your mind today?

Where to I start? Or maybe, what do I do next? There is always so much going on and I like that, but it also becomes burdensome. And my fatigue and dizziness has really been a struggle for me lately, along with anger/irritability.

http://www.mayo.edu/research/ids/knowledge-evaluation-research- unit/programs Minimally Disruptive Medicine

This discussion talk about how

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REFLECTION
The Art of Asking Powerful Questions

To clarify, continue to process, and/or to find a potential experiment or solution

Consider **OARS** technique

- **Open-ended questions**: What, how, when; conversational
- **Affirmations**: Positive reinforcement, meaningful, truthful; align with values and strengths
- **Reflective Listening**: Occasional; spoken and body language
- **Summarizing**: In own words
ACTIVITY PREP:

What questions would you like to ask Pam?
ACTIVITY: Questions to ask Pam
ACTIVITY FOLLOWUP:

• What is the value-add of this question?

• How could we modify or improve upon this question?
Further work

Curiosity, compassion, kindness, care.

Coaching skills to learn and practice:
- Presence
- Active Listening
- Clear communication
- Create awareness
- Co-design actions
  - Planning, goal-setting
  - ‘Experiment’ language
- Manage progress and accountability
  - Patient’s values
  - Clinical
Resources

- Gallacher et al. Annals Fam Med 2012
- Wolff JL, Boyd CM. JGIM 2015 30: 1497-504
- May CR, Montori VM, Mair FS. BMJ 2009
Your Presenters

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QUESTIONS & ANSWERS