Why Capacity Coaching?

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What do you think of when you hear the word “coach”? 
Connie
Connie

- Diabetes
  - 2 oral medications
  - Low-carbohydrate diet
  - Exercise 150 min a week
- Hypertension
  - 1 oral medications
  - Low-salt diet
  - Exercise 150 min a week
- Rheumatoid Arthritis
  - 2 oral medications
  - Mediterranean diet
  - Low impact exercise
Connie

- Working full time at a demanding desk job, plans to retire in 5 years
- Has one kid in college another is a junior in high school
  - High schooler is on varsity volleyball team
- Has aging parents who she is trying to help move to assisted living facility
- Regularly attends and volunteers at her church
The work of being a patient

Sense-making work

Organizing work and enrolling others

Doing the work

Reflection, monitoring, appraisal

Gallacher et al. Annals Fam Med 2012
The work of being a patient

Over a 3-hour real-time report of activity

- ~9 min on medications
- ~5 min monitoring
- ~30 min health activities (e.g., exercising, finding healthy foods)
  - Spencer-Bonilla 2021
- ~40% report having unsustainable treatment burden
  - Tran 2020

https://flic.kr/p/9Gv1YL
Boehmer K et al BMC Fam Prac 2016
Life

Workload
  ↓
Capacity
  ↑
Scarcity

Burden of treatment
  ↓
  access
  use
  self-care

Burden of illness
  →
  Outcomes

Shippee N et al JCE 2012
Minimally Disruptive Medicine (MDM)

Care focused on pursuing patients’ goals with the least possible healthcare footprint on their lives.

May CR, Montori VM, Mair FS. BMJ 2009
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; and Victor M. Montori, MD, MSc
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 of My Life, My Healthcare discussion aid along with other coaching tools
“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/
Coaching in prime time

• 2016 NBC-HWC board exam created. Certified through the National Board of Medical Examiners.

• CPT Category III codes, optional reimbursement began in January 2020. Undergoing review to make codes category I and include telehealth reimbursement.
Growing HWC evidence

• HWC has positive effects on patients’ physiological, behavioral, and psychological conditions. – Kivelä, 2014

• Across 219 articles, HWC demonstrated promising outcomes across chronic diseases, but more research is needed. – Sforzo, 2017

• HWC improves patient self-efficacy, quality of life, and depression symptoms across chronic conditions in short-term follow ups (1-6 months). – Boehmer 2023 in press
Appreciative Inquiry

**DEFINE**
Consider
- What are we exploring?

**DELIVER**
Implement
- How can we try out?
- How do we know if it's working?

**DISCOVER**
Appreciate
- What is the best of what is?
- What is already working?

**DREAM**
Envision
- What is ideal?
- What does it look like?

**DESIGN**
Co-create
- How might we get there?
- What might the process look like?

**OUTCOMES**

**STORIES**

**OPTIONS + STEPS**

**VISIONS + FUTURES**
My Life My Healthcare
How does your healthcare fit with your life?

This discussion aid will help you and your clinician talk about how your healthcare fits with your life.
Are these areas of your life a source of satisfaction, burden, or both?

<table>
<thead>
<tr>
<th>Area</th>
<th>Satisfaction</th>
<th>Burden</th>
</tr>
</thead>
<tbody>
<tr>
<td>My family and friends</td>
<td></td>
<td></td>
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<tr>
<td>My work or finances</td>
<td></td>
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<tr>
<td>Free time, relaxation, fun</td>
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<tr>
<td>Spirituality or life purpose</td>
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<tr>
<td>Where I live</td>
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<tr>
<td>Getting out and transportation</td>
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<tr>
<td>Being active</td>
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<tr>
<td>Social media, TV or screen watching</td>
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<tr>
<td>My emotional life</td>
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<tr>
<td>My memory or attention</td>
<td></td>
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<tr>
<td>The food I eat</td>
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What are the things that your doctors or clinic have asked you to do to care for your health? Do you feel that they are a help, a burden, or both?

<table>
<thead>
<tr>
<th>Activity</th>
<th>Help</th>
<th>Burden</th>
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<td>Monitor symptoms</td>
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<tr>
<td>Manage my diet and exercise</td>
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<tr>
<td>Get enough sleep</td>
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<tr>
<td>Come in for appointments or labs</td>
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<tr>
<td>Reduce alcohol use, smoking, etc.</td>
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<tr>
<td>Insurance or support services</td>
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<tr>
<td>Manage stress</td>
<td></td>
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<tr>
<td>Write in any others</td>
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What are you doing to manage your stress?

Where do you find the most joy in your life?

What else is on your mind today?
My Life My Healthcare Questionnaire

Attached to a message from Nurse Jenelle received 4/18/2022

This discussion will help you and your clinician talk about how your healthcare fits with your life.

What are you doing to manage your stress?

daily walks

Where do you find the most joy in your life?

family

What else is on your mind today?

job stress

Are these areas of your life a source of satisfaction, burden, or both? If an area does not apply, leave blank.

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Adapted Illness Intrusiveness Ratings

Attached to a message from Nurse Jenelle received 4/18/2022

The following items ask about how much your illness(es) and/or its treatment interfere with your life. Please choose the one number that best describes your current life situation. If an item is not applicable, please choose "Not Applicable" to indicate that this aspect of your life is not affected. Please do not leave any item unanswered.

* Indicates a required field.

How much does your illness(es) and/or its treatment interfere with:

<table>
<thead>
<tr>
<th>1=Not very much</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
<th>6</th>
<th>7=Very much</th>
<th>Not applicable</th>
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<td>* Your feeling of being healthy?</td>
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<td>* The things you eat and drink?</td>
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<td>* Your work, including job, house work, chores, or errands?</td>
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<td>* Playing sports, gardening, or other physical recreation or hobbies?</td>
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<td>* Quiet recreation or hobbies, such as</td>
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Capacity Coaching in Action

• We help
  • Process workload (sense making, enrolling help, action, and reflect on what is working or not).
  • Increase capacity (reconstructing biography, mobilizing resources, working within the healthcare environment, building self-efficacy, and considering social support)
  • Reduce treatment burden (communicate with healthcare team about patient goals and challenges)
Capacity Coaching in Action

• “In Capacity Coaching we like to think forward about 3 or 4 months. Now, its unlikely in 3-4 months that you will be off dialysis and everything in your life will be back to normal again. Knowing that, what would you like to be a bit better in 3 or 4 months?”
Capacity Coaching in Action

• Reclaiming activities. Reshaping biography.
• Learning to monitor energy. How many energy credits do you have today?
• Noticing, and celebrating, the gains.
• “I’m here to be your glass half-full.”
Capacity Coaching in Action

• Working with the care team. Dialysis team already includes nephrologist, nurse practitioner, nurses, dietitian, and social worker.

• Example: patient stated they want to improve their mobility and be able to eat a bit more fruit.
How might a “coach” help Connie?
Current work

• Pilot RCT for dialysis patients in Rochester sites, analysis phase
• Clinical implementation for chronic kidney disease patients; end-stage kidney disease enrolled in transitional care unit
• Training people across disciplines (like you!) how to use Capacity Coaching skills in their everyday work
Learn more:
http://carethatfits.org/

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