Case Management Leading in a New World of Health Care

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Objectives

Participants will be able to:
1. Discuss different types of teams
2. Identify effective team building strategies
3. Define boundary spanning leadership (BSL)
4. List the five types of organization boundaries
5. State three boundary spanning strategies
6. Identify three boundary spanning practices

Case Management Practice

• Patient-focus and evidenced-based care
• Family involvement
• Evaluation and dissemination of work
• Change orientation
• Culture supporting share decision-making/authority
• Personal and professional development
• Efficient and professional management of resources
• Function in teams
Types of Teams

Uni-professional:
• Group of people from the same discipline
• comprising only one professional, i.e. all social workers
• Does not involve collaboration across professional boundaries

Types of Teams

Multi-professional:
• Group of people from different disciplines
• Independently focus, i.e. Members will develop a treatment plan independently
• Boundaries within the team are still based on disciplines
• May not include collaboration, but more open communication

Types of Teams

Current Case Management
Interprofessional:
• Interdisciplinary - people from different disciplines work in a collaborative manner
• Interaction and communication is more informal
• Greater respect for team members and their knowledge and skills
• Focus in on what is best for the customer, i.e. client or patient
Types of Teams
Emerging for Case Management Teams

Transprofessional (Cross-professional):
• Greater communication and collaboration
• Bending and overlapping of members roles
• Roles are specialized, but everyone is prepared to step in/replace each other when necessary
• Situational team leadership role

Types of Teams
Future for Case Management Teams

Cross- Agency:
• Maintain employment by home agency
• Function across agency to achieve service outcomes and financial benchmarks
• Flexibility and mobility with cross-agency accountability
• Boundaries are inclusive of, but must also be external to home agency, i.e. this is not a large system approach

Case Management and Conceptual Frameworks
• Learning organization
• Total quality management
• Empowerment
• Situational leadership
• Stewardship
• Evidence-based practice
• Complexity
• Shared governance
• Participatory leadership
**Boundary Spanning Leadership**

What is it?
- Direction
- Alignment
- Commitment

**Five Organization Boundaries**

**Key to Case Management (CM) Roles**

1. **Vertical**
   - Across authority

2. **Horizontal**
   - Across Function & expertise

3. **Stakeholder**
   - Across external groups & interests

**Five Organization Boundaries**

4. **Demographic**
   - Across diverse groups & differences
   - Present CM World

5. **Geographic**
   - Across markets & distances
   - Future CM World
Boundary Challenges

1. List two significant challenges that you are facing.

2. Identify the most important boundaries that may influence your level of success in navigating these challenges.

3. What type of vertical, horizontal, stakeholders, demographic or geographic boundaries do you need to lead across to successfully manage your challenge, and what type of team.

Boundary Mapping Tool

Where is your Gap?

The Most Important and Most Effective Boundaries

Three Boundary Spanning Strategies

Managing Boundaries

Forging Common Grounds

Discovering New Frontiers
Six Boundary Spanning Practices

Managing Boundaries
- **Buffering** – monitor the flow of information and resources; builds a buffer to protect from outside influences; it creates safety, helping members feel secure
- **Reflecting** – facilitates knowledge exchange across groups to foster intergroup respect and understanding

Forging Common Grounds
- **Connecting** – Link people and bridge divided groups to build trust; each group suspends and steps outside their boundaries creating a connection based on similarities to build trust
- **Mobilizing** - common purpose & shared identity to reframe the boundaries creating an intergroup community with new boundaries and collective action

Discovering New Frontiers
- **Weaving** – intergroup communities generative for new work
- **Transforming** – new boundaries made explicit; tensions and challenges are addressed; shifting to new boundaries
## Six Boundary Spanning Practices

### Discovering New Frontiers

- **Weaving** – integrate groups differences to interlace boundaries; yet, each group remains distinct while advancing interdependence; excellent way to take advance of intergenerational groups

- **Transforming** – crossover of members to form a new direction to enable reinvention; a state of renewal; shift is fundamental and transformative

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## Boundary Mapping Tool

**Where is your Gap?**

**The Most Important and Most Effective Boundaries**
Boundary Spanning Leadership

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Thank you

Feedback

Questions