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**Case Managers' Continuum;
Case Managers' Conundrum**

**When Weebles
Don't Wobble**

Presented by:
Irving Stackpole, RRT, MEd

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Case Managers' Continuum

Environmental Challenges

- **Scope & time conflicts**
 - Too much Scope and...
 - "Not enough Time"
- **Evaluation by "exceptions"**
 - Case managers' "errors"
 - Who defines service errors for case managers?
- **Boundary permeation**
 - Where does "the job" end and "me" begin?

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AHCA/NCAL Preconvention Issue FOR LONG TERM CARE PROFESSIONALS SEPTEMBER 2008

Provider


Getting A Grip On TRANSITIONS

Market Basket Update Worth \$780 Million

AHCA/NCAL Convention Preview

Preparation Tool Tailored To SNFs

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Case Managers' Continuum

Environmental Challenges

- **Scope & time conflicts**
 - > scope and < time
 - At what point does "more" = "too much"?
 - Who decides?

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Case Managers' Continuum

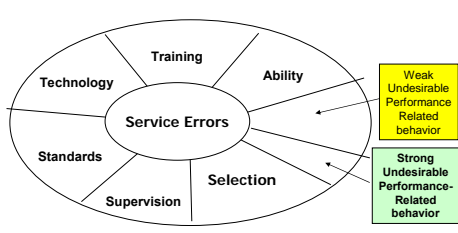
Environmental Challenges

- **Evaluation by "exceptions"**
 - Case managers' "errors"
 - A definition of "quality"
 - And a definition of service errors
 - Managing expectations
 - Clarifying "exceptions" → define quality

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System Problems vs. Behavior



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6


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Case Managers' Continuum

Environmental Challenges

- **Systems Perspective v. Personal**
- **Boundary permeation**
 - Where does "the job" end and "me" begin?
 - Are the systems designed to support the people or vice-versa?

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Continuum or Conundrum?

Failing to "contain the continuum"

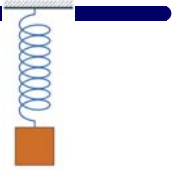
- **Task Fatigue**
- **Professional defensiveness**
- **Functional (task) inefficiency**
- **Functional dis-integration**

An Application of Hooke's Law

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Change
&
Equilibrium



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When Weebles Don't Wobble

Case Managers ≡ “management”

- Weebles ≡ Wobbling

When managers ≠ manage
And Weebles ≠ Wobble

- Recognizing the “≠”

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STACKPOLE & Associates, Inc. Live and let Wobble

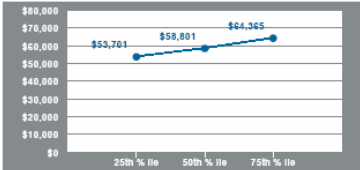


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STACKPOLE & Associates, Inc. Why this job?

CNNMoney.com
Go to [CNNMoney and Salary.com Article about Best Jobs](#)
[Click here for the complete list of job titles by state](#)

Base Salary | Bonuses | Benefits | Data as of July 2009



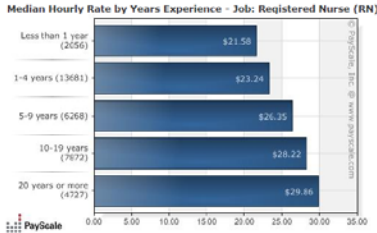
	25th %ile	Median	75th %ile
Case Manager — the United States	\$53,701	\$58,801	\$64,365

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Why *this* job?

Hourly Rate Survey Report for Job: Registered Nurse (RN) (See more jobs)
More reports for this job: Salary, Bonus, Commission, Profit Sharing, more...

Median Hourly Rate by Years Experience - Job: Registered Nurse (RN) (United States)




Years Experience	Median Hourly Rate (USD)
Less than 1 year (2056)	\$21.58
1-4 years (13681)	\$23.24
5-9 years (6268)	\$26.35
10-19 years (7872)	\$28.22
20 years or more (4727)	\$29.86

PayScale
Currency: USD | Updated: 9/29/2008 | Individuals reporting: 34,604

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Management Style?




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In Summary

- **Highly pressurized roles**
- **Vague “systems”**
 - Vague / variable output measures
- **Internal vs. external rewards**

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Borrowed Wisdom

We don't know what we don't know
We can't do what we don't know
We won't know until we measure
We don't measure what we don't value
We don't value what we don't measure

Source: Harry, M & Schroeder, R, Six Sigma

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The Challenge

→ Issue - Leadership
We must define the criteria of success

- **Personal**
- **Professional**

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Leadership & Management

Leadership:
 Articulate a vision that's compelling
 Change Agency

Management:
 Accomplish goals & objectives
 Complexity

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Leadership & Motivation

Leadership:
 Articulate a vision that's compelling
 Change Agency

➤ Motivation

- 'Prompting' others so as to evoke specified behaviors'
- Can anyone 'cause', or 'make' anyone do anything?

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Leadership

- The pace of change has quickened
 - Regulatory changes
 - Inspections
 - Demographic changes –
 - Workforce & Consumers
 - Ethnicity & ageing
 - Macroeconomic changes
 - Outsourcing
 - Technology

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“Either lead, follow, or get out of the way.
But never try to do all three at the same time!”

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Leadership

- Change has drawn us into new partnerships, testing old models
- Are we searching for ways to respond?

How will you?

Do we have a choice?

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Is this your search strategy?

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**"A pessimist would say the glass is half empty.
An optimist would say something naive and annoying."**

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Leadership & Motivation

Leadership – Some Principals*

- Model the way
- Inspire a shared vision
- Challenge the process
- Enable others to act
- Encourage the heart

Kouzes, J. and Posner, B. The Leadership Challenge. Josey Bass, San Francisco, 2002

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Leadership & Motivation

Leadership

- Model the way
 - Are you asking others to do what you wouldn't?
 - Are you talking about your values?
 - Do you have a compelling story?
- People ***first*** follow the person, then the plan

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Leadership Modeling - The Story

Share your story...

- What you value;**
- What has been accomplished;**
- The difference this has made.**

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Leadership & Motivation

Leadership

- Model the way
- Inspire a shared vision
 - Do you have a clear & exciting picture / image?
 - How *could* it be?
 - How big is your dream?

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Leadership Modeling - The Vision

What is your Vision?

- Describe the future you would like to invent!**
- How does this relate to the Vision / Dreams of your colleagues?**

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Leadership & Motivation

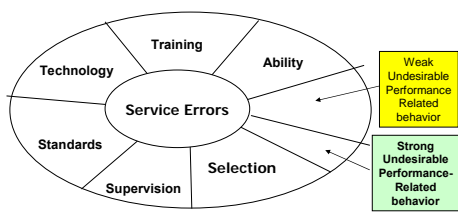
Leadership

- Model the way
- Inspire a shared vision
- Challenge the process
 - Do we really have to do it this way?
 - FACT: ~15% of errors are due to undesirable behavior
 - 85% of errors are the result of "SYSTEMS"

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Differentiate Between System Problems and Behavior




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Leadership – The System

- What part of the “system” are you going to challenge?
 - How and when?
 - Who will you recruit?
 - How will you hold yourself to it?

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Leadership

Leadership

- Model the way
- Inspire a shared vision
- Challenge the process

- Enable others to act
 - How often do you say, "We..."
 - Are you trusted?.. Do you trust?
 - Do you have the information you need?
 - Do others have the information they need and the authority to act?

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Leadership

- Model the way
- Inspire a shared vision
- Challenge the process
- Enable others to act

- Encourage the heart
 - Faint heart never won the long sought prize
 - How do you uplift yourself?
 - How do you emotionally support your colleagues?
 - Most of us live up to the standards created by those with whom we have the most contact / deepest emotional ties, so...
 - Who's in your network?
 - Who would you like to have in your network?

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"You spent four days rubbing elbows with the top people in our field and all you brought back are bruised elbows?"


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Leadership – The Support System

- List one person who is not in your network, and whom you will recruit
 - What will you say / do?
 - What's in it for you/
 - What's in it for them?

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Leadership

Leadership

- Model the way
- Inspire a shared vision
- Challenge the process
- Enable others to act
- Encourage the heart

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Leadership & Motivation

Motivation – A Definition:


“...to furnish with a motive or motives”*

“Motivation” resides *within* each person;

Our job is to connect with *our* motives, and “discover” motivations...

* Webster's New Twentieth Century Dictionary. Unabridged.

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Leadership & Motivation

We *DO* need...

- Focus on clear standards
 - ⇨ Tell wonderful stories
- Expect the Best
 - ⇨ Pygmalion is validated by of data
 - ⇨ What's expected predicts outcomes.

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Leadership & Motivation


Pay Attention

- Be present with each person, at each encounter.

Personalize Recognition

- Theirs and your own!

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Goal Setting

- The value and importance of Goals
- Whatever they're doing, *communicate and remind* why its important, and the end its serving

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Leadership & Motivation

Then, people need to know how they and the organization are doing against the GOALS

Feedback

- Measures
- What gets measured gets done

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Borrowed Wisdom

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Source: Harry, M & Schroeder, R, Six Sigma

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Goals + Feedback = Bonanza!

Percentage Increase in Performance Effort

Category	Percentage Increase
Goals & Feedback	60%
Goals Only	30%
Feedback Only	30%
Control	20%


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Leadership & Motivation

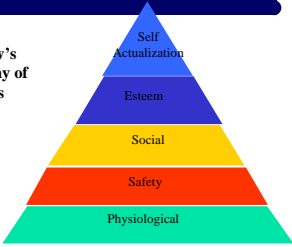
- What the behavioral research says about motivation
 - **Productivity (i.e., motivation) linked to key variables**
 - **Retention / Productivity closely linked**

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Psychological & Organizational Construct

Maslow's Hierarchy of Needs

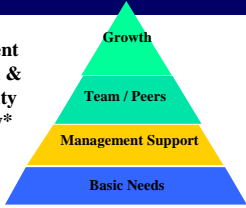


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Motivation & Productivity

Employment Motivation & Productivity Hierarchy*



* From First Break All The Rules, Marcus Buckingham & Curt Coffman


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Motivation & Productivity

Basic Needs

- Do I have the materials needed?
- Do I know where / how to find / access them?
- Do I know what is expected of me?
- Are there clear standards for my job?




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Motivation & Productivity

Management Support

- Someone encourages my development
- Someone at work cares about me
- Receive recognition or praise
- Opportunity to do what I do best




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Motivation & Productivity

Teamwork / Peers

- Have a best friend at work
- Fellow employees are committed to quality
- Mission / purpose of the organization
- My opinions seem to count




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Motivation & Productivity

Growth

- Opportunity to learn & grow
- Review progress at work with my supervisor



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Leadership & Motivation

Our Objectives

- S**pecific
- M**easurable
- A**ctionable
- R**elevant
- T**ime-based

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