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Diversity, Equity, and Inclusion for the Ethical Case Manager



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“DEI and Patient-centered Care are at the core of ethical case management practice”
(Fink-Samnick & Garrett, 2023)



Objectives

1. Demonstrate how the dynamic of intent and impact manifests for case managers.
2. Identify elements of the inclusive case management model.
3. Use neutral language to ensure inclusive client engagement across practice settings.
4. Apply case management’s established resources of guidance to diversity, equity, and inclusion practices.



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The Cultural Evolution

Cultural Competence to Cultural Humility



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What's in a Name?

- Cultural Competence**
- Cultural Awareness**
- Cultural Diversity**
- Cultural Humility**
- Cultural Sensitivity**

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And Then Came..... Values

| |
|--------------|
| Diversity** |
| Equity* |
| Inclusion** |
| Belonging*** |
| Justice** |

(*Dictionary.com, 2023; **Merriam-Webster, 2023; Society for Human Resource Management, N.D.)
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And Then Came..... Neutral Language

| |
|------------------|
| She/Her/Hers |
| He/Him/His |
| They/Them/Theirs |
| Sie/Sie/Hir/Hirs |
| Zie/Zim/Zir/Zis |

(MyPronous.org, n.d.)
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Ethics Matter

Social Work's Core Values:

- Service
- Social justice
- Dignity and worth of the person
- Importance of human relationships
- Integrity
- Competence

(2021)
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Ethics Matter



Commission for Case Manager Certification

Underlying Values
Board-certified case managers (CCMs) recognize the dignity, worth and rights of all people

Section 5 S 20 — Unprofessional behavior
...if the Board-certified case manager (CCM) engages in conduct involving discrimination against a client because of race, ethnicity, religion, age, gender, sexual orientation, national origin, marital status, or disability/handicap (2015)




Certified Disability Management Specialist

Principle 2: Respect the integrity, dignity, and protect the welfare of those persons or groups with whom they are working

Principle 3: Maintain objectivity in their relationships with clients (2019)

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Ethics Matter




AMERICAN NURSES ASSOCIATION

Code of Ethics (2015):
Provision 1: The nurse practices with compassion and respect for the inherent dignity, worth, and unique attributes of every person.


Ethical Principles:

- Autonomy
- Beneficence
- Fidelity
- Justice
- Nonmaleficence
- Veracity (2023)



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Ethics Matter



Case Management Society of America

Standard D. Ethics
Recognition of obligations:

- First to clients cared for
- Second, to engage in and maintain cooperative and respectful relationships with employers, coworkers, and other professionals.
- Third, to maintain personal and occupational health, safety, and integrity and.....
- View clients as unique individuals whom CMs should engage without regard to disability, familial preference, gender identity, sexual orientation, race or ethnicity, national origin, migration, background, religion, socioeconomic status, geographic location, or other cultural considerations,
- Enact policies to ensure universal respect of the integrity and worth of each person
- The needs of society as a whole, by recognizing the complexities and impact on health and well-being that inequity and disparity, bias, exclusion, racism, and injustice caused, but address individually

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How Does This Translate to Our Individual Practice?



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Intent v. Impact



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Intent v. Impact

- Microaggressions
- Microinsults
- Microinvalidations

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Microaggression Management

- Don't automatically apologize for what you said but thank the person for alerting you.
- *Try not* to become defensive or dismiss the person's feelings
- Listen to the person receiving the microaggression and empathize with their feelings.
- Take responsibility for underlying bias held toward certain groups.

(Knight, 2020)

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Microaggression Management

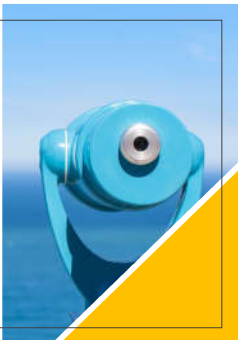
- Take steps to become more educated and understanding on your own time
- Recognize that while you made a mistake, you're not a bad person
- Commit to change microaggressive behaviors.


(Knight, 2020)

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Inclusive Case Management 101





Inclusive Case Management

- Inclusive case management is a methodical, intentional, and impactful approach to engaging professional practice by case managers and their leadership.
- Implementation occurs at all levels intervention.

(Fink-Samnack & Garrett, 2023)

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Inclusive Case Management 101

Micro

Mezzo

Macro

(Fink-Samnack & Garrett, 2023)

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Consider this....


Michael is a new CM for a behavioral health division of an MCO; he identified as a Caucasian male. He has a virtual meeting with his colleague Anda, who is a Black woman and has recently been promoted. She is transitioning part of her caseload to Michael until her replacement completes onboarding and orientation.

Michael asks Anda, "What matters most to each of these clients? I want to understand their preferences."

Anda says, "Why would you ask a stupid question like that? This is a managed-Medicaid plan. All our patients are lazy and unemployed and probably noncompliant with their meds. Many claim to be "trans" and want me to refer to them as "they".

We implemented those DEIJ-focused quality metrics to track how we engage all clients. I've made it look good in the documentation, so just keep it going.

How would you craft an Inclusive Case Management approach?



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Examples: Case Managers

1. Allow clients to identify family and social support regardless of blood relations
2. Assess for social/psychosocial needs through assessment, and
3. Assure community-based referrals are completed
4. Ask about format for provider encounters whether in-person, virtual, audio, instant messaging), and
5. Provider preferences (e.g., geographic location, gender, race)
6. Attend to health literacy encompassing knowledge of conditions, medications, and health insurance, and
7. Techquity (e.g., digital health literacy, WIFI and broadband access)
8. Have access to certified medical interpreters
9. Honor preferences for integrative health providers and services
10. Use Person First Language (e.g., emphasis on the person versus the diagnosis or disability)
11. Use preferred pronouns

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Examples: Leadership

1. Collaborate with CBOs on common interest areas to bridge care gaps for mutual populations
2. Ensure health education materials are available in multiple languages, formats, platforms (e.g., apps, flyers, infographics, Braille, audio)
3. Involve and support employee resource groups
4. Celebrate various heritage months (e.g., Black History Month, Pride Month)
5. Allow work schedule flexibility for employees with childcare/caregiver responsibilities, plus for religious/cultural celebrations
6. Develop policies to reflect DEI that are aligned with performance metrics
7. Develop and sustain hiring practices to ensure a diverse workforce composition
8. Develop and sustain mentoring and sponsorship initiatives to retain a diverse workforce
9. Explore community investment opportunities to decrease care gaps for populations served
10. Have readily available accommodations for persons with disabilities (e.g., physical, cognitive, intellectual, mental health)
11. Integrate patient-reported outcome measures for all demographics (e.g., patient engagement, activation)

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Inclusive CM Communication

- Maintain a current list of definitions
- Use inclusive language
- Use gender-inclusive language
- Reflect the client's language
- Stay aware of holistic health risks for your client populations (e.g., higher incidence of medication nonadherence or primary care follow-up, greater risk of interpersonal violence, higher incidence of unemployment)
- Convey respect through all actions



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Think

How can you implement Inclusive Case Management within your place of employment?

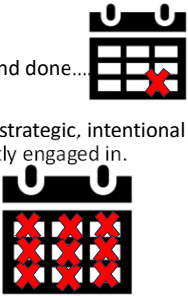


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Remember.....

- DEI efforts are not one and done...

Rather, they are enduring strategic, intentional actions that are consistently engaged in.



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Remember...

Establish rapport through respect for autonomy



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Remember.....

- Each patient and colleague interaction brings valuable learning and the opportunity to grow inclusive case management competence.



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Resources

- **American Psychological Association:** inclusive language guidelines
 - Inclusive Language Guidelines: <https://www.apa.org/about/apa/equity-diversity-inclusion/language-guidelines>
- **Fenway Health:** <https://fenwayhealth.org>
- **OutCare:** <https://www.outcarehealth.org/outlist/>
- **Pronouns.org:** <https://pronouns.org>
- **RacialEquityTool.org:** <https://racialequitytools.org/glossary>
- **RespectAbility:** <https://respectability.org>
- **World Professional Association for Transgender Health**
 - Trans Care Standards: <https://wpath.org/publications/soc>

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|---|---|---|
| Questions |  |  |
|  | Thank you! | EFS Supervision Strategies, LLC <small>EMPOWERING INTERPROFESSIONAL KNOWLEDGE</small> |
| <p>Dr. Ellen Fink-Samnick DBH, MSW, LCSW, ACSW, CCM, CCTP, CRP, FCM Health Equity Strategist, Educator, Content Developer www.efssupervisionstrategies.com efssupervision@me.com LinkedIn: Ellen's Ethical Lens Post.com: @drel_dbh Blog: Ellen's Interprofessional Insights</p> | |  |

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| national case management week <small>OCTOBER 8-14, 2023</small> |  <i>Keeping the person at the heart of collaborative care.</i> |
| HAPPY CASE MANAGEMENT WEEK | |
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