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INNOVATIONS

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# Advancing Communication Excellence (ACE) Initiative

A joint effort of the  
Center for Care Innovations & Blue Shield of California Foundation

## REQUEST FOR PROPOSALS

# Advancing Communication Excellence (ACE) Initiative

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*The Center for Care Innovations, in partnership with Blue Shield of California Foundation, is pleased to announce the availability of new opportunities for safety net providers to advance the work of improving and aligning communication skills in support of enhanced patient experience of care.*

## Program Background

After years of preparation, the 2014 implementation of the Patient Protection and Affordable Care Act is finally here, providing millions of Californians with access to healthcare coverage. With the new law, many previously uninsured patients now have access to a wide array of providers. For safety net organizations facing increased pressure to establish themselves as their patients provider of choice, this change brings both tremendous challenge and unprecedented opportunity to deliver care in a way that connects more deeply with patients and encourages them to engage with their health home in new and better ways.

An extensive [study](#) completed by Langer Research Associates in 2013 on enhancing patient-centered care dramatically highlighted the importance of effective and empathic communication with patients, as well as the strong correlation between communication and a positive care experience. Every staff member can influence patient experience – from leaders to clinicians to administrative staff – and because of this, communications training must include every person in the healthcare organization. Strengthening the communication skills of providers and staff has become a high priority for safety net healthcare organizations in California. These skill-building initiatives are most successful if organizations continually work to promote these skills through deliberate organizational development and alignment, and prioritize communications skills as fundamental to establishing connectedness and continuity with patients.

With the support of Blue Shield of California Foundation, CCI has designed and implemented programs focused on innovations that improve patient engagement and experience. In partnership with the Institute for Healthcare Communication (IHC)<sup>1</sup>, CCI launched the Optimizing Patient Experience (OPE) initiative in 2012. IHC delivered a train-the-trainer program for health center staff using the Treating Patients with C.A.R.E. curriculum (C.A.R.E). C.A.R.E provides a model for effective communication by focusing on the principles of connection, appreciation, response, and empowerment. CCI continued this work in 2013 with the Engaging Patients to Improve Care (EPIC) program, which offered additional health centers and safety net providers the opportunity to participate in the C.A.R.E. train-the-trainer program.

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<sup>1</sup> The [Institute for Healthcare Communication](#) (IHC) is a nonprofit organization established in 1987 to improve healthcare communication. They have a proven track record in delivering high quality training programs and have conducted more than 12,000 workshops reaching 160,000 physicians and health care professionals in the United States and Canada. They have also worked with numerous community health centers and public hospitals in California.

## Overview

By launching the Advancing Communication Excellence Initiative, CCI seeks to build on the successes of past programs, spread and sustain achievements, strengthen capabilities of participants and respond to new requirements. Specifically, CCI aims to:

- ❖ Provide more clinics with the tools to enhance communication skills among staff, providers and their patients;
- ❖ Help organizations sustain their work in effective communication by coaching supervisors and managers on ways to maintain their staff's skills;
- ❖ Bolster these trainings by providing a learning community to address ways in which health care organizations can align and imbed these skills to promote and sustain a culture of communication excellence.

To meet these objectives, the ACE Initiative is composed of two program options:

1. **Treating Patients with C.A.R.E.** is a train-the-trainer program designed and facilitated by IHC that builds internal capacity for training all staff of a health care organization. This option is only available for clinics that have not previously participated in the C.A.R.E. training programs offered by CCI (specifically OPE or EPIC).
2. **Coaching for Impressive Care** is a train-the-trainer coaching program designed and facilitated by IHC that is available to organizations that have already implemented a C.A.R.E. training program. This program seeks to support and sustain the achievements of the C.A.R.E. program by offering a coaching workshop for clinic managers and supervisors to effectively support their teams in using C.A.R.E. skills on an ongoing basis.

In an effort to reinforce the work of these two training programs and embed their principles into the culture of the organization, the ACE Initiative will also offer the **ACE Academy**, a virtual learning series on the essential components of building and sustaining a culture of communication excellence in a healthcare organization. The ACE Academy will be offered to both ACE program cohorts, past C.A.R.E. training cohorts (OPE and EPIC), as well as other healthcare organizations that have engaged in programs focused on enhanced communication skills for staff and providers.

Each program component, along with the application requirements, grant support and timeline, is further described below.

## Program #1- Treating Patients with C.A.R.E.

### PROGRAM DESCRIPTION

Treating Patients with C.A.R.E. is a methodology developed by the Institute for Healthcare Communication that focuses on improving communication between a clinic's staff and providers and their patients. The C.A.R.E. curriculum consists of a four-hour training workshop with guided discussion, shared storytelling, example videos and interactive exercises. The training is organized around the four principles that inspired the C.A.R.E. acronym: **connect**, **appreciate**, **respond**, **empower**.

C.A.R.E. is designed as a train-the-trainer workshop, so the success of this program is contingent upon the commitment and leadership ability of the nominated trainers. Every organization must nominate at least three participants to become C.A.R.E. trainers. We strongly recommend that organizations

nominate at least one provider, to help maximize uptake among clinicians. For clinics with more than 100 employees, CCI recommends the following trainer ratios:

- ❖ 100 or fewer staff members – 3 trainers
- ❖ 100-250 staff members – 4 trainers
- ❖ 250-400 staff members – 5 trainers
- ❖ 500 + staff members - 6 trainers

Each clinic will send selected trainers to a 2.5 day train-the-trainer workshop to learn the “Treating Patients with C.A.R.E.” curriculum. This training will most likely be held in the San Francisco Bay Area or Los Angeles; the exact location will be determined once the final grantees are selected. One to two months following this workshop, IHC will certify the new trainers by observing them conduct a four-hour C.A.R.E. workshop to staff at their respective sites. Following certification, C.A.R.E. trainers at each site are expected to work with clinic leaders to roll out a C.A.R.E. program that trains all staff and providers in the following 12 months. Throughout the yearlong implementation, grantees will participate in the ACE Academy learning series, which aims to reinforce the principles of the C.A.R.E. program and engage participants in an ongoing discussion about how to embed these principles into the culture of the organization.

## PROGRAM SUPPORT

Successful applicants will receive a \$25,000 grant to support the implementation of this program. For this program, CCI and IHC commit to do the following:

- ❖ Host and facilitate a 2.5 day train-the-trainer workshop on the “Treating Patients with C.A.R.E” curricula.
- ❖ Provide trainers with course materials to support the training.
- ❖ Certify new trainers at each clinic organization and offer detailed feedback to trainers.
- ❖ Provide each clinic organization with a one-year site license to print C.A.R.E. workbooks for training participants. Clinics will be responsible for workbook printing costs (approximately \$6-\$8 per workbook). Additionally, IHC is able to grant CE credit to C.A.R.E. participants, but each organization is responsible for the \$15 per person CE certificate fee.
- ❖ Provide an opportunity to participate in the ACE Academy learning series. This learning series will focus on sustaining momentum beyond the workshops, integrating communication skills into the organizational workflow, and creating cultural transformation around the importance of effective communication.

## PROGRAM REQUIREMENTS

Each organization will be expected to participate in the following activities:

- ❖ Send 3-6 participants to the “Treating Patients with C.A.R.E.” train-the-trainer workshop.
- ❖ Implement a clinic-wide C.A.R.E. training program in which all staff (including providers) will be required to attend the 4-hour C.A.R.E. workshop throughout the course of the program year. The training can be delivered in 4-hour, 2-hour or 1-hour modules depending on constraints of the health care organization.
- ❖ Submit updated C.A.R.E. training work plans and patient experience measurement tools throughout the program.
- ❖ Employ at least one patient experience measurement tool throughout the program year to assess the impact of the program.

- ❖ Actively participate in the ACE Academy learning series.
- ❖ Implement 3-5 approaches to integrate C.A.R.E. skills into the everyday workflow of the clinic. For example, this might include presenting awards to staff with exemplary C.A.R.E. skills at monthly meetings, instituting a C.A.R.E. skill of the month, or creating C.A.R.E. pins for workshop participants.

## IDEAL APPLICANT

This program is best suited for primary care health centers and clinics that demonstrate the following:

- ❖ Strong leadership commitment to build a patient-centered culture by offering a clinic-wide communications training program.
- ❖ Ability to identify members of the project team. At a minimum, this team should include an executive sponsor, designated C.A.R.E. trainers, and a project manager. Preference will be given to organizations that will nominate a provider as part of the trainer cohort. The project manager may also be a C.A.R.E. trainer. Nominated trainers must exhibit a strong ability to speak and interact with large groups of participants and demonstrate a willingness to serve in a leadership role to improve communication between clinic staff, providers, and patients.
- ❖ Commitment to allocate the time needed to train the entire organization during the program year and participate in the Ace Academy hour-long webinars (approximately 6-7 sessions throughout the program year).
- ❖ Dedication to ongoing measurement and quality improvement.

Clinic organizations currently participating in the Optimizing Patient Experience or Engaging Patients to Improve Care- C.A.R.E. programs are not eligible to apply for this program component.

## PROPOSAL QUESTIONS

If applying for program option #1, please answer the following questions in five pages or less using at least 11-point font and 1-inch margins.

1. How are the program's objectives relevant to your organization and patient population?
2. Tell us about any prior or current participation in initiatives focused on patient engagement and how this program option would complement these efforts.
3. What has been the organization's experience in tracking patient experience measures and what measures would you track to assess the impact of this program?
4. Please provide a preliminary C.A.R.E. training implementation timeline (including how you would roll-out the training to your staff and providers). As a point of reference, the train-the-trainer workshop will most likely take place in mid-October and trainer certification is usually completed during the month following the workshop. After certification, trainers can begin conducting C.A.R.E. trainings with staff at your organization.
5. The impact of the C.A.R.E. training program is dependent on how a clinic incorporates the tenets of the training program into its everyday workflow. What ideas or approaches would you implement at your clinic to systematize the C.A.R.E. program in order to engage your staff on a continuing basis to improve communication and experience of care?
6. Clinics must appoint a team to manage this program to ensure that the training and organization-wide patient experience activities are completed. Please list the name, title and project responsibilities of each member of this team, including an executive sponsor, project lead, and

designated trainers. Describe why the nominated trainers are well positioned to become C.A.R.E. trainers.

## Program #2- Coaching for Impressive Care

### PROGRAM DESCRIPTION

Very often, clinic staff is asked to support new ideas, initiatives and processes without sufficient training. This is particularly true of mid-level managers and supervisors who are often promoted because they excel in their current job duties. Supervision and coaching, however, requires a different skillset. In order to support supervisors and managers in their efforts to maintain and promote C.A.R.E. skills, the IHC “Coaching for Impressive Care” (CFIC) course provides front-line supervisors with a model of coaching that supports staff communication in ways that will enhance satisfaction and encourage patient partnership. This course builds on the C.A.R.E. curriculum and guides supervisors in using a C.A.P. (Connect, Assess, Plan) coaching model to strengthen communications skills among their team members.

Selected organizations will have already successfully trained all staff and providers in the C.A.R.E. curriculum and demonstrate a commitment to build communication skills into their organizational culture. Each organization will nominate up to three staff members to attend the CFIC train-the trainer course. While it is encouraged that the nominated trainers are C.A.R.E. trainers, it is not required. Nominated trainers should have strong facilitation skills and demonstrate the ability to speak comfortably in front of a group of clinic leaderships and management.

Participating organizations will be expected to conduct CFIC workshops for all clinic management throughout the program year. Organizations will be expected to actively participate in the ACE Academy learning series and share their experiences implementing the C.A.R.E. program when requested.

### PROGRAM SUPPORT

Successful applicants will receive a \$25,000 grant to support the implementation of this program. For this program option, CCI and IHC commit to the following:

- ❖ Host and facilitate 2.5 day train-the-trainer workshop on the “Coaching for Impressive Care” curricula.
- ❖ Provide trainers with course materials to support the training.
- ❖ Certify new trainers at each clinic organization and offer detailed feedback to trainers. Individuals previously certified as C.A.R.E. trainers will not need to be certified in the CFIC course.
- ❖ Provide each clinic organization with a one-year site license to print CFIC workbooks for training participants. Clinics will be responsible for workbook printing costs.
- ❖ Provide an opportunity to participate in the ACE Academy learning series. This learning series will focus on integrating communication skills into the organizational workflow, sustaining momentum beyond the workshops, and creating cultural transformation around the importance of effective communication.

### PROGRAM REQUIREMENTS

Each organization will be expected to participate in the following activities:

- ❖ Send up to three participants to the “Coaching for Impressive Care” train-the-trainer workshop.
- ❖ Implement the CFIC coaching workshop program for all management and supervisory employees throughout the program year.
- ❖ Facilitate ongoing training of new staff in C.A.R.E. workshops, as well as support all staff in employing the C.A.R.E. skills on an ongoing basis.
- ❖ Employ at least one patient experience measurement tool throughout the program year to assess the impact of the program.
- ❖ Actively participate in the ACE Academy learning series and present on their experience implementing C.A.R.E. when requested.

## IDEAL APPLICANT

This program is best suited for primary care health centers and clinics that demonstrate the following:

- ❖ Successful implementation of C.A.R.E. training workshops for all staff and providers in the organization and demonstrated commitment to build communication skills into their organizational culture.
- ❖ Strong leadership commitment to support a patient-centered culture by offering a communications coaching course for all management and supervisory staff.
- ❖ Ability to identify three exemplary individuals from the clinic who could serve as CFIC trainers. Nominated CFIC trainers must exhibit the ability to interact comfortably with leaders and managers. While we recommend that CFIC trainers also be C.A.R.E. trainers, it is more important that nominated trainers demonstrate strong teaching skills and the willingness to train and coach managers and supervisors in how to best support their teams.
- ❖ Commitment to allocate the time needed for all managers and supervisors to attend a 4-hour CFIC training during the program year.
- ❖ Dedication to ongoing measurement and quality improvement.

## PROPOSAL QUESTIONS

If applying for program option #2, please answer the following questions in five pages or less using at least 11-point font and 1-inch margins.

1. Describe the impact of the C.A.R.E. program implementation on your organization and how leadership was engaged in this process.
2. Besides the trainings, how did your organization build enhancing communication skills into its organizational culture?
3. Describe how the Coaching for Impressive Care program will support the C.A.R.E. program at your organization and address some of the challenges you have faced in the program implementation.
4. Please list the name, title and brief description of each nominated CFIC trainer and describe why they are well positioned for this role.
5. Please provide a preliminary CFIC training implementation timeline for management and supervisory staff. The CFIC train-the-trainer workshop will take place in October. CFIC trainers that are not already C.A.R.E. trainers must be certified by an IHC Master Trainer, which will take place between October and December. Trainers may begin to facilitate CFIC workshops once they have been certified.

## ACE Academy

Intensive training in communication skills—like the C.A.R.E. and CFIC programs—are essential first steps in changing the culture of an organization. Equally important are the methods and tools used to embed new skills and principles into the fabric of the health center after the initial training ends. In an effort to reinforce and build on the successes of these training programs, the ACE Academy will offer a series of virtual meetings focused on “wrap around,” culture-building and sustaining tactics and techniques for patient-centered communication.

The ACE Academy is intended to provide ongoing learning opportunities for ACE grantees, as well as other healthcare organizations that have implemented communication training programs in their organizations. Techniques for organizational alignment will be covered, such as:

- ❖ Embedding communication skills in job descriptions, hiring procedures, annual performance reviews, and staff satisfaction surveys;
- ❖ Extending the focus on communication skills beyond the training workshops and incorporating it into the everyday workflow of the organization;
- ❖ Getting beyond “flavor of the month” initiative fatigue;
- ❖ Incorporating techniques and examples from industries heavily dependent on customer satisfaction and retention.

In addition to engaging communication experts and consultants in this series, CCI will seek speakers from outside the health care sector to provide a fresh perspective on customer service and patient engagement. These sessions will be recorded and shared publicly on the CCI website afterwards.



## ACE Initiative: Application Process

All program information and application submission information can be found on [CCI's website](#).

### ELIGIBILITY CRITERIA

Clinic corporations, ambulatory care clinics at public hospitals, and other California-based nonprofit health centers that provide comprehensive primary care services to primarily underserved populations are eligible to apply.

Organizations must be a nonprofit and tax-exempt organization under 501(c)(3) of the Internal Revenue Service Code (IRC) or a governmental, tribal, or public entity. Examples of eligible organizations that comprise the safety net include:

- ❖ Free-standing community clinics and health centers
- ❖ Ambulatory care clinics which are part of public hospital systems either located in the public hospital or out in the community
- ❖ Primary care health centers (including those sponsored by Public Health departments)
- ❖ American Indian Health Centers

### TIMELINE

1. Attend the ACE Informational Webinar on Friday, July 11, 2014, 11 am- 12 pm PDT. [Register here](#). Website and dial-in information will be provided in the registration confirmation.
2. Submit an application [online here](#) by 5 pm PDT on Friday, August 1, 2014.
3. Proposals will be reviewed by CCI and an external review committee and awards will be announced by Friday, September 5, 2014.

### APPLICATION INSTRUCTIONS

All required information must be submitted through the [ACE Application Form](#) by 5 pm PDT on Friday, August 1, 2014. The proposals should include the following:

1. ACE Application Form information
2. Proposal Questions: Applicants must complete the set of proposal questions specific to the program option to which they are applying. Proposal narratives must be 5 pages or less using at least 11 point font.
3. Project Budget Worksheet (budget templates can be found [here](#))

## IMPORTANT DATES

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### **Informational Webinar**

July 11, 2014, 11:00 am PDT

### **Application Deadline**

August 1, 2014, 5:00 pm PDT

### **Award Notification**

September 5, 2014

### **Program Launch**

October 2014

## Application at a Glance

### How do I apply?

Submit an application [online here](#) by 5:00 pm PDT on Friday, August 1, 2014. Applicants will be required to upload a response to the proposal questions and a preliminary budget worksheet.

### Who is eligible to apply?

Clinic corporations, ambulatory care clinics at public hospitals, and other California-based nonprofit health centers that provide comprehensive primary care services to primarily underserved populations are eligible to apply. Organizations must be a nonprofit and tax-exempt organization under 501(c)(3) of the Internal Revenue Service Code (IRC) or a governmental, tribal, or public entity. Examples of eligible organizations that comprise the safety net include:

- Free-standing community clinics and health centers
- Ambulatory care clinics which are part of public hospital systems either located in the public hospital or out in the community
- Primary care health centers (including those sponsored by Public Health departments)
- American Indian Health Centers

### Where can I find more information?

Attend the ACE Initiative Informational Webinar on Friday, July 11, 2014, 11 am- 12 pm PDT to hear a detailed description of the program and ask questions. [Register here](#) for the webinar.

For any other questions, please contact:

#### **Susannah Brouwer**

Program Coordinator, Center for Care Innovations  
(415) 561-6394

[susannah@careinnovations.org](mailto:susannah@careinnovations.org)

## A joint effort of



**Center for Care Innovations (CCI)** is a vital source of ideas, best practices and funding for California's health care safety net. By bringing people and resources together, we accelerate innovations for healthy people and healthy communities.

[www.careinnovations.org](http://www.careinnovations.org)



Blue Shield of California Foundation is an Independent Licensee of the Blue Shield Association

**Blue Shield of California Foundation (BSCF)** is committed to making health care effective, safe and accessible for all Californians, particularly underserved people, and to ending domestic violence. BSCF believes safety and access to health care are fundamental rights of everyone and that ensuring Californian's health and safety requires the involvement of individuals, employers and government agencies.

<http://www.blueshieldcafoundation.org>