INCLUSIVE CASE MANAGEMENT'S EVOLUTION: A ROADMAP FOR HEALTH EQUITY PRACTICE TRANSFORMATION

Dr Ellen Fink-Samnick
Principal, EFS Supervision Strategies, LLC

1

TALK ABOUT A RIPPLE-EFFECT



EFS Supervision Strategies, LLC 2025 ©

2

LEARNING OBJECTIVES

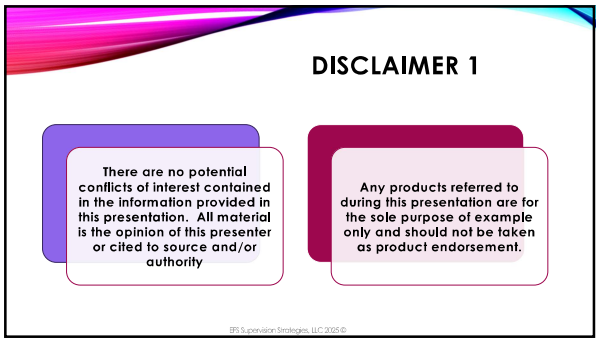
By the end of this session, attendees will be able to:

1. Describe the transition from patient-centric to inclusive care
2. Define the six touchpoints of the Inclusive Case Management Roadmap
3. Illustrate application of the Roadmap with case management's Established Resources of Guidance
4. Apply each of the six (6) elements of the Roadmap to attendee practice

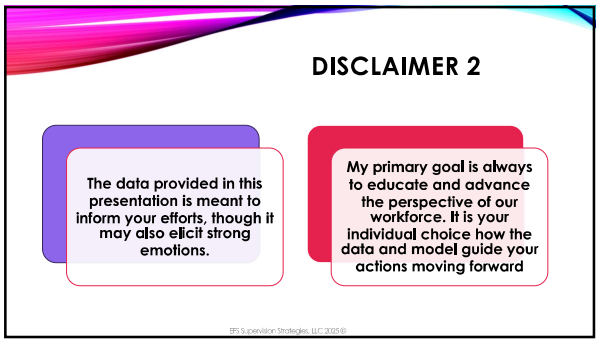


EFS Supervision Strategies, LLC 2025 ©

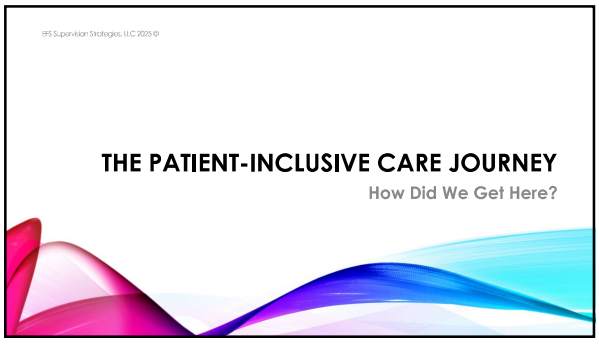
3


DISCLAIMER 1
There are no potential conflicts of interest contained in the information provided in this presentation. All material is the opinion of this presenter or cited to source and/or authority
Any products referred to during this presentation are for the sole purpose of example only and should not be taken as product endorsement.
EFS Supervision Strategies, LLC 2025©

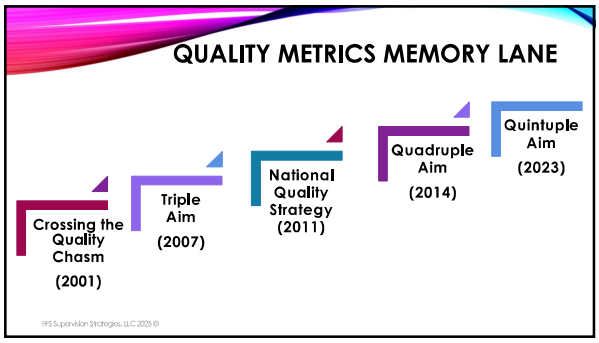
4


DISCLAIMER 2
The data provided in this presentation is meant to inform your efforts, though it may also elicit strong emotions.
My primary goal is always to educate and advance the perspective of our workforce. It is your individual choice how the data and model guide your actions moving forward
EFS Supervision Strategies, LLC 2025©

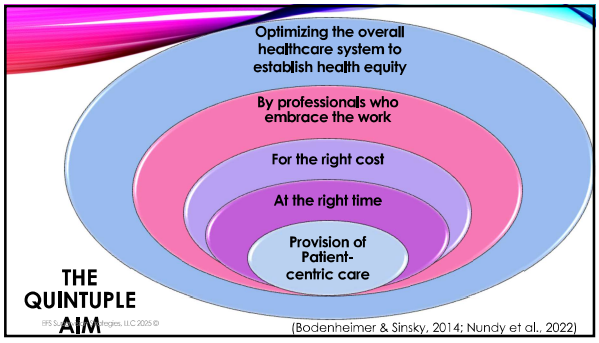
5


EFS Supervision Strategies, LLC 2025©
THE PATIENT-INCLUSIVE CARE JOURNEY
How Did We Get Here?

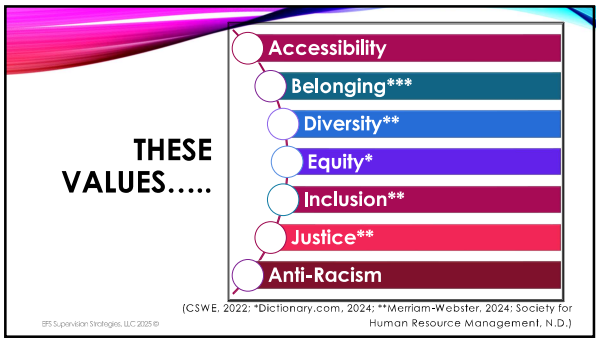
6


QUALITY METRICS MEMORY LANE
Crossing the Quality Chasm (2001)
Triple Aim (2007)
National Quality Strategy (2011)
Quadruple Aim (2014)
Quintuple Aim (2023)

7


Optimizing the overall healthcare system to establish health equity
By professionals who embrace the work
For the right cost
At the right time
Provision of Patient-centric care
THE QUINTUPLE AIM
(Bodenheimer & Sinsky, 2014; Nundy et al., 2022)

8


THESE VALUES…..
Accessibility
Belonging***
Diversity**
Equity*
Inclusion**
Justice**
Anti-Racism
(CSWE, 2022; *Dictionary.com, 2024; **Merriam-Webster, 2024; Society for Human Resource Management, N.D.)

9

DATA SHIFTS

94%

26%

16%

25%

40 %

(Carter & Johnson, 2022; Fink-Samnick, 2024; Just Capital, 2023; Relias, 2023)

FFS Supervision Strategies, LLC 2025 ©

10

CONSIDER THIS….

Michael is a new CM for the behavioral health division of an MCO; he identifies as a cisgender, Caucasian male. He has a virtual meeting with his colleague Anda, a Black woman who has recently been promoted. Anda 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."



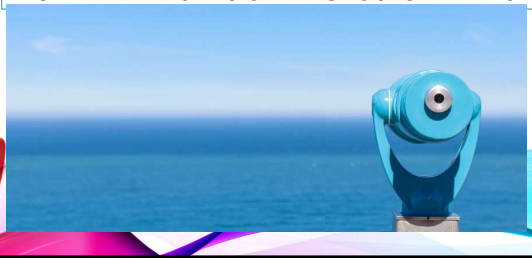
Anda replies, "Why would you ask a stupid question like that? This is a managed-Medicaid plan. All our patients are lazy, unemployed, and noncompliant with their meds. Many claim to be "trans" and want me to refer to them as "they". I can't keep up with this crap……We implemented those DEIB-focused quality metrics to track how we engage all clients. I made the outcomes look good, so just keep it going."

FFS Supervision Strategies, LLC 2025 ©

11

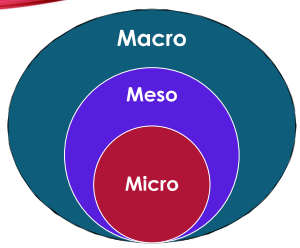
FFS Supervision Strategies, LLC 2025 ©

HOW WIDE IS YOUR INCLUSION LENS?



12

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 of intervention.

(Fink-Samnick & Garrett, 2023)

EFS Supervision Strategies, LLC 2025 ©

13

CONSIDER…..



How do you make every involved stakeholder (e.g., patients, families, colleagues) feel:

- **Safe,**
- **Seen,**
- **Heard, and**
- **Valued?**

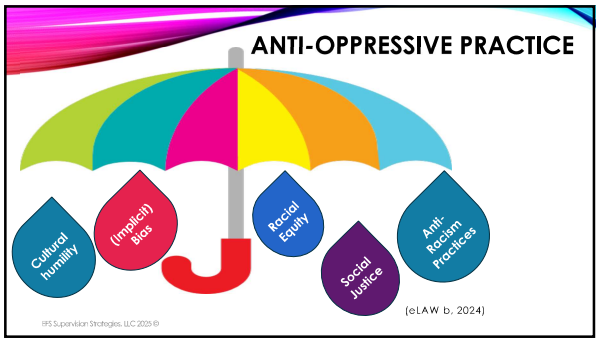
EFS Supervision Strategies, LLC 2025 ©

14

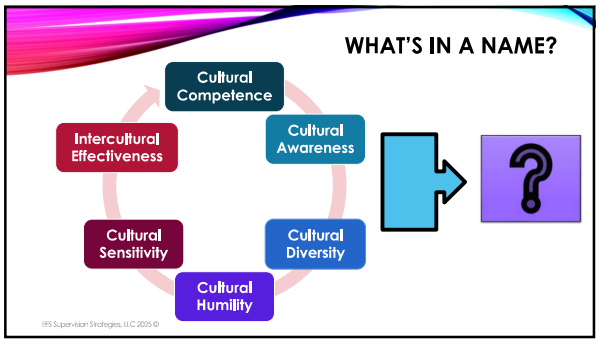
EFS Supervision Strategies, LLC 2025 ©

MANAGING THE TERMINOLOGY TRANSIT SYSTEM

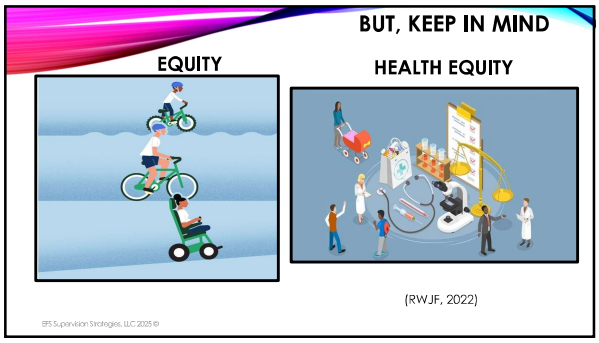
15


ANTI-OPPRESSIVE PRACTICE
Cultural humility
(Implicit) Bias
Racial Equity
Social Justice
Anti-Racism Practices
(eLAW b, 2024)

16


WHAT'S IN A NAME?
Cultural Competence
Cultural Awareness
Intercultural Effectiveness
Cultural Sensitivity
Cultural Diversity
Cultural Humility

17


BUT, KEEP IN MIND
EQUITY
HEALTH EQUITY
(RWJF, 2022)

18

EFS Supervision Strategies, LLC 2025 ©

REGULATORY ROUND-UP

What's on the Regulatory Road-Trip?

19

REGULATORY COMPLIANCE

2024 HHS Rights of Conscience Bill

Safeguards Rights of Conscience as Protected by Federal Statutes: 45 CFR §§ 88.1 – 88.4.

- Defines protections and enforcement of procedures surrounding rights of healthcare providers and entities to be free from discrimination associated with their decisions to participate or refrain from participating in procedures based on their conscience.

U.S. Department of Health and Human Services
Enhancing the health and well-being of all Americans

U.S. Equal Employment Opportunity Commission

OPM U.S. Office of Personnel Management

(EEOC, 2024; HHS, 2024 a and b)

EFS Supervision Strategies, LLC 2025 ©

20

REGULATORY COMPLIANCE

Framework for Health Equity Priorities:

1. Expand collection, reporting, and analysis of data
2. Assess causes of disparities with CMS programs and address inequities in policies/operations to close gaps
3. Build capacity of health care organizations the workforce to reduce health/healthcare disparities
4. Advance language access, health literacy, and provision of culturally tailored services
5. Increase all forms of accessibility to health care services and coverage

(2023)

CMS CENTERS FOR MEDICARE & MEDICAID SERVICES

The Joint Commission

Health Equity Accreditation Resource Center

- Health Equity Leader-Driven Priorities
- Assess Health-Related Social Needs
- Prioritize, Plan, Take Action
- Use Data to Identify Disparities Across Patient Groups
- Monitor Health Care Equity Progress
- Inform Stakeholders
- Evidence-based Interventions

(2024)

EFS Supervision Strategies, LLC 2025 ©

21

ORGANIZATIONAL ACCREDITATION

- Case Management Accreditation
- Health Equity Accreditation
- Health Equity Accreditation Plus

- Case Management Accreditation

- Diversity, Equity, Inclusion: Magnet Status Application

- Health Equity Accreditation

(Bryant et al., 2022; NCQA, 2024, URAC/NMQF, 2024)

EFS Supervision Strategies, LLC 2025 ©

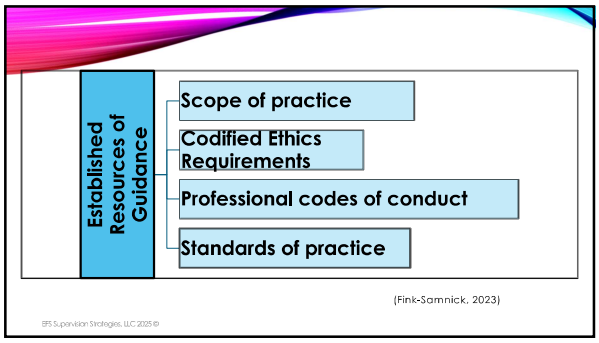
22

EFS Supervision Strategies, LLC 2025 ©

THE ESTABLISHED RESOURCES OF GUIDANCE

BOLSTERING THE PROFESSIONAL FOUNDATION

23



(Fink-Samnick, 2023)

EFS Supervision Strategies, LLC 2025 ©

24

SCOPE OF PRACTICE

(eLaws, 2024)

Maryland.gov

Board of Nursing Subtitle 27

Chapter 10.27.19. Code of Ethics

Section 10.27.19.12 Ethical Responsibilities (2023)
A nurse shall:

(1) Provide services with respect for human dignity and the uniqueness of a client unrestricted by consideration of social or economic status, religious affiliation, personal attributes, or the nature of health problems;

B. A nurse may not, when acting in the capacity or identity of a licensed nurse:

(2) Engage or participate in an action that violates or diminishes the civil or legal rights of a client;

C. A nurse may not engage in behavior that dishonors the profession whether or not acting in the capacity or identity of a licensed nurse, including, but not limited to:

(1) Verbal abuse, including use of racial or ethnic slurs, directed toward a coworker, employer, Board staff member, client, or client's family member;

BFS Supervision Strategies, LLC 2025 ©

25

SCOPE OF PRACTICE

Maryland.gov

(eLaws, 2024 a, b)

Part 5. Board of Social Work Examiners
Subtitle 42

Chapter 10.42.03. Code of Ethics (2021)

B. The Licensee shall not:

(5) Practice, condone, facilitate, or collaborate with discrimination on the basis of race, gender, sexual orientation, age, religion, national origin, socioeconomic status, disability, or any other basis proscribed by law;

(6) Engage or participate in an action that violates or diminishes the civil or legal rights of a client;

COMAR 10.42.06.03.A.(1)(d)
Continuing Education Requirements:

- *"(d) 3 of the required Category I continuing education units shall have anti-oppressive social work practice content focusing on race, culture, or equity, and include one or more of the following topics: (i) Cultural humility; (ii) Social justice; (iii) Racial equity; (iv) Implicit bias; or (v) Anti-racism practices;"*

BFS Supervision Strategies, LLC 2025 ©

26

Standards of Practice & Scope of Services

- Accountability,
- Professionalism,
- Collaboration,
- Advocacy,
- Resource Management
- Screening and Identification
- Assessment
- Plan of Care
- Identification

(ACMA, 2023)

BFS Supervision Strategies, LLC 2025 ©

27

CODES OF ETHICS

ANA
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.

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

(2021)



EFS Supervision Strategies, LLC 2025 ©

28

STANDARDS OF PRACTICE

Standard D. Ethics
- Autonomy (to respect individuals' rights to make their own decisions),
- Beneficence (to do good),
- Fidelity (to follow-through and to keep promises),
- Justice (to treat others fairly), and
- Nonmaleficence (to do no harm)

CMSA™ Case Management Society of America

(2022)

Recognition of Obligations:

1. To clients cared for
2. Engage in and maintain cooperative and respectful relationships with employers, coworkers, and other professionals.
3. To maintain personal and occupational health, safety, and integrity, and…

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

29

Standards of Practice

CMSA™ Case Management Society of America

(2024)

Standard C. Legal
Standard E. Advocacy
Standard F. Cultural Competence
Standard H. Health Information Technology
Standard K. Identification of care needs and opportunities
Standard M. Facilitation, coordination, and collaboration, and
Standard Q. Diversity, Equity, Inclusion, and Belonging, and Health Equity



EFS Supervision Strategies, LLC 2025 ©

30

CODES OF PROFESSIONAL CONDUCT

Board-certified case managers will:
Principle 2: respect the rights and inherent dignity of all of their clients.
Principle 3: always maintain objectivity in their relationships with clients.
Principle 4: act with integrity and fidelity with clients and others.
Principle 7: Obey all laws and regulations

(2023)

Board-certified disability management specialists shall
Principle 2: respect the integrity, dignity, and protect the welfare of those persons or groups with whom they are working.
Principle 3:……..ditto
Principle 4:……in dealing with other professionals
RPC 1.08 – Objectivity
RPC 1.12 d: Misconduct
RPC 1.13 a: Human Relations

(2023)

EFS Supervision Strategies, LLC 2025 ©

31

Competency 3: Engage Anti-Racism, Diversity, Equity, and Inclusion (ADEI) in Practice

Social workers:
- Understand how racism and oppression shape human experiences and how these two constructs influence practice at the individual, family, group, organizational, and community levels and in policy and research.
- Understand the pervasive impact of White supremacy and privilege and use their knowledge, awareness, and skills to engage in anti-racist practice.
- Understand how diversity and intersectionality shape human experiences and identity development and affect equity and inclusion, and
- That this intersectionality means that a person's life experiences may include oppression, poverty, marginalization, and alienation as well as privilege and power.

(CSWE, 2022)

EFS Supervision Strategies, LLC 2025 ©

32

QUESTIONS



EFS Supervision Strategies, LLC 2025 ©

33

BREAK



EFS Supervision Strategies, LLC 2025 ©

34

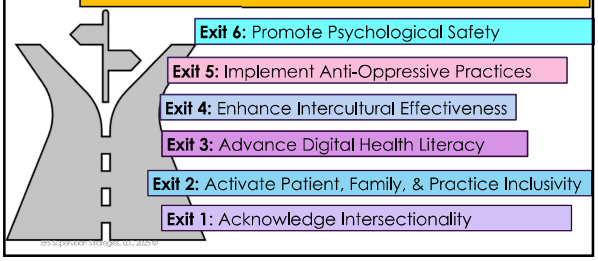
EFS Supervision Strategies, LLC 2025 ©

INCLUSIVE CASE MANAGEMENT ROADMAP

Organizing Your Journey

35

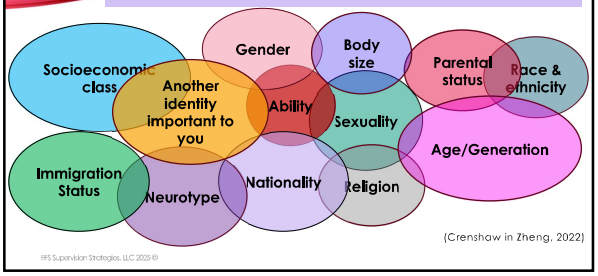
THE INCLUSIVE CASE MANAGEMENT ROADMAP



EFS Supervision Strategies, LLC 2025 ©

36

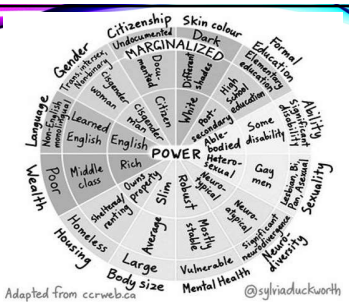
EXIT 1. ACKNOWLEDGE INTERSECTIONALITY



EFS Supervision Strategies, LLC 2025 ©

37

Wheel of Privilege & Power



EFS Supervision Strategies, LLC 2025 ©

Used with explicit permissions from Sylvia Duckworth (n.d.)

38

EXIT 2: ACTIVATE PATIENT, FAMILY, & PRACTICE INCLUSIVITY

- **Maintain a current list of definitions**
  - CMSA DEIB Position Statement
    - Health Equity
    - Equity
    - Diverse/Diversity
    - Inclusion
    - Belonging
    - PLUS, more on the horizon
      - CM Toolkit
      - Member Library

CMSA Case Management Society of America

CMSA POSITION STATEMENT ON DIVERSITY, EQUITY, INCLUSION & BELONGING

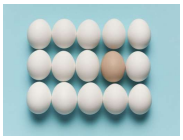
EFS Supervision Strategies, LLC 2025 ©

39

USE INCLUSIVE LANGUAGE

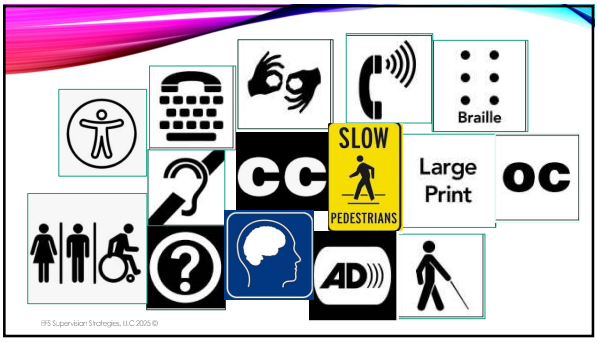
American Psychological Association Inclusive Language Guidelines, 2nd Ed (2023)

- General terms related to equity and power
- Person-first and identity-first language, including terms to avoid
- Identity-related terms
  - Age
  - Body size and weight
  - Ableism (AKA: Disabilities)
  - Neurodiversity
  - Race, Ethnicity, Culture
  - Sexual Orientation and Gender Diversity
  - Socioeconomic status
- Avoiding Microaggressions in Communication



EFS Supervision Strategies, LLC 2025 ©

40



EFS Supervision Strategies, LLC 2025 ©

41

REMEMBER THAT GENDER…. NEUTRAL LANGUAGE

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

(MyPronous.org, n.d.)

EFS Supervision Strategies, LLC 2025 ©

42

MIND THAT BIG "B"!

Assessment Points: Think Treatment Adherence vs. Compliance

- How well does the client understand the diagnosis & treatment recommendations?
- Has client and/or caregiver language proficiency and/or health literacy been explored?
- Does the client reside in a food or pharmacy desert?
- What is the client's access to healthy food choices to support wellness?
- Can the client afford to buy food, medication, and/or meet their financial obligations under their insurance plan (e.g., co-pays and deductibles)?
- Does the client have physical/behavioral health issues that limit food shopping access?
- Does the client have issues obtaining medications, attending appointments, and/or adhering to other treatments (e.g., transportation, languages spoken by the provider)?
- Does someone else prepare meals for the client?

(Fink-Samnick & Garrett, 2023)

EFS Supervision Strategies, LLC 2025 ©

43

MIND THAT BIG "B"!

Assessment Points (cont'd)

- Are there safety issues in the community that impact the client's ability to get to the grocery store, attend medical appointments, obtain medications, etc.?
- Does the client have internet proficiency, literacy, or finances to access meal delivery options?
- Do the client's work hours make it hard to go food shopping at a full-service grocery store?
- Does the client shop at a 24-hour convenience store that lacks a selection of healthy foods?
- Are there religious and/or cultural dietary considerations that must be considered?
- Are there other psychosocial stressors that impact the client, and the client's glucose levels?
- Can the client go to a provider based on their preferences (e.g., gender race) in a setting that is accessible and in a language that they are conversant?

(Fink-Samnick & Garrett, 2023)

EFS Supervision Strategies, LLC 2025 ©

44

7 PILLARS OF INCLUSION

ACCESS | ATTITUTDES | CHOICE | PARTNERSHIPS

COMMUNICATION | POLICY | OPPORTUNITY

(Downs, 2016)

EFS Supervision Strategies, LLC 2025 ©

45

THINK

Which of the tools discussed can enhance Patient- and Family-Inclusivity for your populations?



EFS Supervision Strategies, LLC 2025 ©

46

EXIT 3: ADVANCE DIGITAL HEALTH LITERACY

1. **Who assesses health literacy of their patient populations?**
   a. YES
   b. NO

2. **Who assesses the digital health literacy of their patient population?**
   a. YES
   b. NO

EFS Supervision Strategies, LLC 2025 ©

47

EXIT 3: ADVANCE DIGITAL HEALTH LITERACY

Give patients (caregivers) all 3 screening items

I can use apps/programs on my digital devices on my own or without help	I can set up video/virtual chats on my digital devices on my own or without help	I can troubleshoot basic tech issues on my digital devices on my own or without help

For each item, the patient responds with their level of agreement

0=Strong disagreement	4=Strong agreement

Response scores are totaled for a digital health literacy score

The higher the score, the higher a patient or caregiver's digital health literacy

(Nelson, et al. 2022)

EFS Supervision Strategies, LLC 2025 ©

48

EXIT 4: ENHANCE INTERCULTURAL EFFECTIVENESS

CAN EVERY CASE MANAGER BE CULTURALLY COMPETENT WITH ALL "OTHERS"?

(A person or thing that is different or distinct from one already mentioned or known about) (Merriam-Webster, 2024)

a. **YES**

b. **NO**

Of course not?



Can they strive to be aware and informed of other cultures with whom they work with and relate to?

- **YES!**

EFS Supervision Strategies, LLC 2025 ©

49

STANDARDS OF PRACTICE

CMSA™ Case Management Society of America

Standard F: Cultural Competency

- The professional case manager should *maintain sensitivity and awareness* to cross-cultural differences and be responsive to the cultural and linguistic diversity of the demographics of their work setting and the specific client and caregiver needs.

Demonstrated by:

- Evidence of communicating in a practical, respectful, and sensitive manner and following the client's cultural and linguistic context.
- Complete assessments, set goals, and develop a case management plan to accommodate cultural and linguistic needs and services preferences.
- Identify appropriate resources to enhance the client's access to care and improve health care outcomes. These may include the use of interpreters and health educational materials which apply language and format demonstrative of understanding of the client's cultural and linguistic communication patterns, including but not limited to speech volume, context, tone, kinetics, space, and other similar verbal/non-verbal communication patterns.
- Pursue professional education to maintain and advance 'one's cultural competence and effectiveness while working with diverse client populations.

EFS Supervision Strategies, LLC 2025 ©

(2022, 2024)

50

USE NON-JUDGMENTAL COMMUNICATION

- Maintain an affirming presence to establish trust
- Ask the client to verify their:
  - gender and pronouns
  - race and ethnicity, and
  - WHO is in their family or support system, regardless of blood relation
- Demonstrate empathic and reflective listening
- Respect client autonomy by allowing the person to speak
- Empower clients through open-ended questions:
  - What matters most to you?
  - What can I do for you today?
- Respond, clarify, and confirm instead of react
- Honor the client's religious and cultural beliefs, values, and choices

(Fink-Samnick & Garrett, 2023)

EFS Supervision Strategies, LLC 2025 ©

51

INTERCULTURAL EFFECTIVENESS: 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

52

INTERCULTURAL EFFECTIVENESS: LEADERSHIP

1. Health education materials available in multiple languages, formats, platforms (e.g., apps, flyers, infographics, Braille, audio)
2. Readily available accommodations for people with physical, cognitive, intellectual, and mental health disabilities
3. Involve and support employee resource groups
4. Celebration of all heritage events (e.g., Black History Month, Pride Month, Womens' History Month, Day of Trans Visibility, Persons with Disabilities Month, Social Work Month,)
5. Work schedule flexibility for employees with childcare and/or elder care responsibilities, religious and cultural celebrations
6. Develop DEI-specific policies aligned with performance metrics
7. Develop/sustain hiring practices to ensure a diverse workforce composition, and
8. Ensure comprehensive, accessible, understandable, and inclusive benefit programs
9. Collaborate with CBO's on shared population priorities to bridge treatment gaps
10. Develop and sustain mentoring/sponsorship initiatives to retain/promote a diverse workforce
11. Explore community investment opportunities to decrease gaps in care for populations served by an organization
12. Integrate patient-reported outcome measures by for all demographics (e.g., patient engagement, activation)

53

THINK

How do you ensure intercultural effectiveness within your place of employment?



EES Supervision Strategies, LLC 2025 ©

54

EXIT 5: IMPLEMENT ANTI-OPPRESSIVE PRACTICES

Cultural Humility	• Cultural awareness • Intercultural effectiveness • Intersectionality identification
Biases	• Implicit • Explicit • General
Racial Equity	• Micro-aggressions • Microinsults • Micro-invalidations
Social Justice	• Anti-racist practice
Trauma	• Trauma-Informed Care

IRS Supervision Strategies, LLC 2025 ©

55

CULTURAL HUMILITY

An ongoing process of self-exploration and self-critique combined with a willingness to learn from others.

a. a lifelong commitment to self-evaluation and self-critique;
b. a desire to fix power imbalances; and
c. a wish to develop partnerships with people and groups who advocate for others.

What does this mean to you?

(Tervalon & Murray-Garcia, 1998)



IRS Supervision Strategies, LLC 2025 ©

56

(IMPLICIT AND EXPLICIT) BIASES

"During the exam, the attending doctor didn't take me seriously. He was very dismissive and talked down to me.....

Once the exam was completed, the doctor stepped out of the room, and I overheard him telling his supervisor that I was 'drug-seeking,'

I was sent home and told to go to my primary doctor for a follow-up."



(By Deen Allen to Gillespie, 2023)

IRS Supervision Strategies, LLC 2025 ©

57

BIAS

"[For] the non-person of color, it is seen as advocating for themselves . . and wanting the care they deserve, whereas a person of color doing that is seen as aggressive or belligerent."

N=3000
(Fernandez et al., 2024)

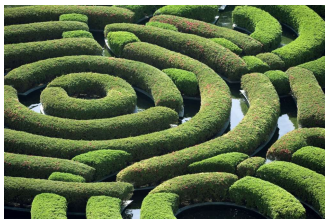
50%

EFS Supervision Strategies, LLC 2025 ©

58

RACIAL EQUITY

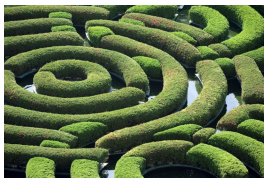
INTENT
VS.
IMPACT



EFS Supervision Strategies, LLC 2025 ©

59

RACIAL EQUITY



INTENT VS. IMPACT

- Microaggressions
- Microinsults
- Microinvalidations

EFS Supervision Strategies, LLC 2025 ©

60



MICROAGGRESSION MANAGEMENT

Do Not:

- Automatically apologize for what you said or did, but thank the person for alerting you.
- Become defensive or dismiss the person's feelings

(Knight, 2020)

EFS Supervision Strategies, LLC 2025 ©

61



MICROAGGRESSION MANAGEMENT

Do:

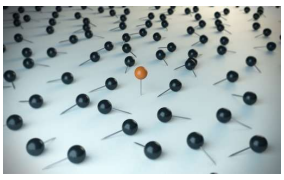
- Listen to the person receiving the microaggression and empathize with their feelings.
- Take responsibility for bias
- Take steps to become more educated and understanding on your own time
- Recognize that while you made a mistake, you're not a bad person
- Commit to change microaggressive behaviors.

EFS Supervision Strategies, LLC 2025 © (Knight, 2020)

62

SOCIAL JUSTICE

- Social Justice is about ADVOCACY, EQUITY
  - Public Policy: Federal, state, local
  - Using your voice to:
    - Call out inequities
    - Identify oppression, discrimination, or disparities in care
    - Educate colleagues
    - Mitigate gaps and barriers in access to care
    - Volunteer for your professional association (HINT, HINT)



EFS Supervision Strategies, LLC 2025 ©

63

TRAUMA-INFORMED CARE

(Harris & Fallot, 2001)

- Physical, psychological, emotional safety
- Trust
- Choice
- Collaboration
- Empowerment

64

TRAUMA-INFORMED SYSTEMS

(Oral et al., 2020)

- Address cultural, historical, & gender issues
- Safety
- Trustworthiness & transparency
- Peer support
- Collaboration
- Empowerment, voice, & choice

65



- Maren is a case manager for the ICU. Most patients have complex, co-occurring chronic health and mental health conditions
- They work on-site and usually for 12-hour days. Maren works through lunch, though grabs a snack. Each day, they repeat the cycle.
- Maren's manager, Tim, checks in via Zoom. Maren looks pale and appears tense, then asks, "How are you?
- Maren replies, We're fine. What choice do we have?

Tim considers a trauma-informed systems approach

66

Culture, historical, & gender issues	No more us vs. them culture. Staff can't openly speak; I worry how any trauma they've experienced is being triggered by this culture. Folks done seem safe, seen, heard, or valued.
Safety	• Maren, let me to support you. These are rough times & we've all got limits. You're too valuable to lose.
Trustworthiness & transparency	• The team is used to me telling them what to do, without explanation. Time to share why we do, what we do.
Peer support	• Staff should adjust their schedules to ease their stress. Thoughts Maren?
Collaboration	Maren, Let's see what's on your plate. I'll take some so you can finish early and head out of here.
Empowerment, voice, & choice	• We must define new ways to name what you and the other CMs need to be successful, for now and moving forward.

EBS Supervision Strategies, LLC 2025 ©

67

THINK

How can you provide a Trauma-informed approach within your place of employment?



EBS Supervision Strategies, LLC 2025 ©

68

Exit 6: Promote Psychological Safety

Set a space where all feel:

- Respected by,
- Comfortable with,
- Confident of,

the care received, and by all practitioners who render that care.

(Fukami, 2023)



EBS Supervision Strategies, LLC 2025 ©

69

SET PSYCHOLOGICAL SAFETY

- Make eye contact
- Read the room
- Inform
- Ask
- Provide a comfortable "no-blame" atmosphere
- Use active listening: nods, facial expressions
- Treat patients as partners in their care:
  - Use shared decision-making
- Avoid saying: *I KNOW HOW YOU FEEL*



EES Supervision Strategies, LLC 2025 ©

70

SHARE

(AHRQ, 2020)

Step 1:	• **S**eek your patient's participation.
Step 2	• **H**elp your patient explore and compare treatment options.
Step 3	• **A**ssess your patient's values and preferences.
Step 4	• **R**each a decision with your patient.
Step 5	• **E**valuate your patient's decision

EES Supervision Strategies, LLC 2025 ©

71

THINK

Identify one way to ensure Psychological Safety within your place of employment!



EES Supervision Strategies, LLC 2025 ©

72

IN THE END…….

INCLUSIVE CM is not one and done….



Rather, it is part of an enduring strategy of intentional actions, which are *consistently* engaged in and reviewed for revision.

"Iterate, celebrate, reiterate"
-Zheng, 2023



EFS Supervision Strategies, LLC 2025 ©

73

IN THE END….

Each patient and colleague interaction brings valuable learning ….Each also becomes an opportunity to grow Inclusive Case Management competence.



EFS Supervision Strategies, LLC 2025 ©

74

RESOURCES

- American Psychological Association:
  - Inclusive Language Guidelines: https://www.apa.org/about/apa/equity-diversity-inclusion/language-guidelines
- American Society on Ageism: https://www.asaging.org/ageism
- Center for Disability Rights: https://cdrnys.org/blog/uncategorized/ableism/
- Center for Health Care Strategies:
  - Trauma-Informed Care Implementation Center: https://www.traumainformedcare.chcs.org/trauma-informed-care-in-action/
  - Health.gov:
    - Health Literacy Resources: https://health.gov/our-work/national-health-initiatives/health-literacy/resources
- Institute for Healthcare Improvement:
  - Age-Friendly Health Systems: https://www.ihi.org/networks/initiatives/age-friendly-health-systems

EFS Supervision Strategies, LLC 2025 ©

75

RESOURCES

- Joint Commission
  - Health Equity Accreditation Resource Center: https://www.jointcommission.org/our-priorities/health-care-equity/accreditation-resource-center/
- NCQA
  - Case Management Accreditation: https://www.ncqa.org/programs/health-plans/case-management-cm/
- National Minority Quality Forum: https://nmqf.org/n
- OutCare: https://www.outcarehealth.org/outlist/
- Patient Bill of Rights: https://clinicalcenter.nih.gov/participate/patientinfo/legal/bill_of_rights.htm
- Prounouns.org: https://pronouns.org
- RacialEquityTool.org: https://racialequitytools.org/glossary

IRS Supervision Strategies, LLC 2025 ©

76

RESOURCES

- RespectAbility: https://respectability.org
- Unlearning Ableism: https://unlearningableism.com/
  - 2024 Position Paper: https://unlearningableism.com/policy-papers/
- URAC
  - Case Management Accreditation: https://www.urac.org/accreditation-cert/case-management-accreditation/
  - Health Equity Accreditation: https://www.urac.org/accreditation-cert/health-equity-accreditation/
- U.S. Equal Opportunity Employment Commission: https://www.eeoc.gov/age-discrimination
- World Professional Association for Transgender Health
  - Trans Care Standards: https://wpath.org/publications/soc

IRS Supervision Strategies, LLC 2025 ©

77

REFERENCES

- ACMA (2023). Standards of Practice and Scope of Services; Little Rock, AK
- AHRQ (2020). SHARE. Retrieved from https://www.ahrq.gov/health-literacy/professional-training/shared-decision/tool/resource-1.html
- ANA (2015). Code of Ethics for Nurses; Silver Spring, MD
- American Psychological Association (2023). Inclusive language guide (2nd ed) https://www.apa.org/about/apa/equity-diversity-inclusion/language-guide.pdf
- Carter, R. and Johnson, N. (2022). To sustain DEI momentum, companies must invest in 3 areas; *Harvard Business Review*, November 4, 2022; Retrieved from https://hbr.org/2022/11/to-sustain-dei-momentum-companies-must-invest-in-3-areas
- CCMC (2023). Code of Professional Conduct; Mt. Laurel, NJ
- CDMS (2023). Code of Professional Conduct; Mt. Laurel, NJ
- CMSA (2022). Standards of Practice for Case Management; Brentwood, TN
- CMS (2023). Framework for Health Equity, Retrieved from https://www.cms.gov/priorities/health-equity/minority-health/equity-programs/framework
- CSWE (2022). Education Policy and Accreditation Standards (EPAS): Author, Alexandria, VA
- Downs, P. (2016, September 10). The 7 Pillars of Inclusion. The Inclusion Club; Retrieved March 3, 2023 from http://theinclusionclub.com/the-7-pillars-of-inclusion/

IRS Supervision Strategies, LLC 2025 ©

78

REFERENCES

- Duckworth, S. (n.d.). Wheel of Privilege and Power Graphic; Permissions provided March 2, 2023; Graphic Retrieved March 2, 2023 from https://www.instagram.com/sylviaduckworth/?hl=en or https://linktr.ee/sylviaduckworth
- eLaws (2024a). Maryland Rules, Title 10. Maryland department of health, Part 4., Subtitle 27. Board of Nursing, Chapter 10.27.19. Code of Ethics.
- /S0140-6736(23)00344-6
- eLaws(2024b). Title 10, Maryland Department of Health, Subtitle 42 Board of Social Work Examiners, 10.42.03. Code of Ethics.
- Fink-Samnick E. (2024). Diversity, Equity, and Inclusion Start From Within. *Professional case management*, *29*(1), 1–3. https://doi.org/10.1097/NCM.0000000000000698
- Fink-Samnick, E. & Garrett, M. (2023) Chapter 5, Diversity, Equity, Inclusion, and Justice in The Ethical Case Manager: Tools and Tactics, HCP2HCP/Blue Bayou Press.
- Fukami T. (2023). Shared decision making with psychological safety. *Lancet (London, England)*, *401*(10383), 1153–1154. https://doi.org/10.1016 Harris, M., & Fallot, R. D. (2001). Envisioning a Trauma-Informed Service System: A Vital Paradigm Shift. New Directions for Mental Health Services, 89, 3-22. https://doi.org/10.1002/yd.23320018903

79

REFERENCES

- Harris, M., & Fallot, R. D. (Eds.). (2001). *Using trauma theory to design service systems.* Jossey-Bass/Wiley.
- HHS (2024). Fact Sheet: Rights of Conscience Protections, https://www.hhs.gov/conscience/conscience-protections/fact-sheet-safeguarding-rights-conscience-protected-federal-statutes/index.html
- Just Capital (2021). Survey analysis: companies commit to DEI: https://justcapital.com/reports/companies-are-committing-to-diversity-equity-and-inclusion-but-need-to-increase-accountability-and-action/
- Knight, R. (2020). You've been called out for a microaggression: what do you do? *Harvard Business Review*. Retrieved March 3, 2023 from https://hbr.org/2020/07/youve-been-called-out-for-a-microaggression-what-do-you-do
- Merriam-Webster (2024). Definitions
- My Pronouns.org (n.d.) MyPronouns.org Retrieved March 2, 2023 from https://pronouns.org
- National Association of Social Workers (NASW). (2021). Code of Ethics for Social Work; Washington, DC
- Nelson, L. A., Pennings, J. S., Sommer, E. C., Popescu, F., & Barkin, S. L. (2022). A 3-Item Measure of Digital Health Care Literacy: Development and Validation Study. *JMIR formative research*, *6*(4), e36043. https://doi.org/10.2196/36043

80

REFERENCES

- Nundy, S., Cooper, L. A., & Mate, K. S. (2022). The Quintuple Aim for Health Care Improvement: A New Imperative to Advance Health Equity. *JAMA*, *327*(6), 521–522. https://doi.org/10.1001/jama.2021.25181
- Oral, R., Coohey, C., Zarei, K., Conrad, A., Nielsen, A., Wibbenmeyer, L., Segal, R., Wojciak, A. S., Jennissen, C., & Peek-Asa, C. (2020). Nationwide efforts for trauma-informed care implementation and workforce development in healthcare and related fields: a systematic review. *The Turkish journal of pediatrics*, *62*(6), 906–920. https://doi.org/10.24953/turkjped.2020.06.002
- Baker, J. (2023). How diversity, equity, and inclusion can influence healthcare; RELIAS: https://www.relias.com/blog/how-diversity-equity-inclusion-influence-healthcare
- Tervalon, M., & Murray-García, J. (1998). Cultural humility versus cultural competence: a critical distinction in defining physician training outcomes in multicultural education. *Journal of health care for the poor and underserved*, *9*(2), 117–125. https://doi.org/10.1353/hpu.2010.0233
- U.S. Equal Employment and Opportunity Commission (EEOC). (2024). Enforcement guidance on harassment in the workplace: EEOC Notice, Number 915.064. Date: 4/29/24; Retrieved July 1, 2024 from https://www.eeoc.gov/laws/guidance/enforcement-guidance-harassment-workplace
- Zheng, L. (2022). Reconstructing DEI: A practitioner's workbook; Berrett-Koehler Publishers; Oakland, CA
- Zheng, L. (2023). DEI deconstructed; Berrett-Koehler Publishers; Oakland, CA

81

Q & A

Dr. Ellen Fink-Samnick
DBH, MSW, LCSW, ACSW, CCM, CCTP, CRP, FCM
Wholistic Health Equity Strategist
www.efssupervisionstrategies.com
efssupervision@me.com

LinkedIn: Ellen's Ethical Lens
Twitter: @profcsw.com
Blog: Ellen's Interprofessional Insights





Thank you!

EFS Supervision Strategies, LLC 2025 ©

82

HAPPY CASE MANAGEMENT WEEK!

CASE MANAGERS
Powering the Future of Healthcare

EFS Supervision Strategies, LLC 2025 ©

83