



THE
Help Me Grow[®]
MANUAL

Special Addendum

Training *Help Me Grow* Care Coordinators



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INTRODUCTION

Training *Help Me Grow* Care Coordinators

Well-trained Care Coordinators are a fundamental part of your *Help Me Grow* system. Without well-informed, positive, persistent, well-supported, and empathetic telephone Care Coordinators, families cannot be linked successfully to the supports and services they need!

To help affiliates provide the best possible training for their Care Coordinators, we have created this addendum to the *Help Me Grow* Manual. It includes vital insights and suggestions for effective Care Coordinator trainings, collected from affiliates across the National Network.

What You'll Find Here

- Definitions of *Help Me Grow* Care Coordination
- Differences between Information & Referral staff and *Help Me Grow* Care Coordination
- Requirements for and attributes of effective *Help Me Grow* Care Coordination
- Content knowledge and training topics for *Help Me Grow* Care Coordinators
- Tips for developing a *Help Me Grow* Care Coordination training curriculum
- *Help Me Grow* Care Coordination training resources
- Insights and experiences from *Help Me Grow* Care Coordinators

A Caveat

While we offer valuable information in this addendum, no single Care Coordinator training manual could meet the varied needs of all *Help Me Grow* affiliates. For example, *Help Me Grow* telephone Care Coordination occurs in many different kinds of organizations across the National Network, such as 2-1-1 agencies, private non-profits, and state agencies.

These host or home organizations likely already provide training on elements of care coordination. Therefore, this addendum focuses on the training of a *Help Me Grow* Care Coordinator. Consider it a supplement to the training already provided by your home organization.



NAVIGATE

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DEFINE

Help Me Grow Care Coordinator

A *Help Me Grow* Care Coordinator (*HMG CC*) is a staff member at a centralized access point. She or he links children and their families to community-based services and programs.

The *HMG CC* helps families overcome barriers to services and follows up with them to make sure linkages are successful. Typically, an *HMG CC* has a lower caseload than a general call center staffer, but with an increase in intensity and scope.

Care Coordination beyond The Telephone

We also want to note that the understanding of care coordination is evolving beyond the telephone. Care coordination in general involves active engagement of families and others involved with the family. The specific activities used to engage families to assess needs, research and link families to appropriate resources, and follow-up with families are varied.

Over time, the methods of delivering care coordination have grown to include email, secure video conferencing, telehealth, and more. Thus, while the primary mode of communication for a *Help Me Grow* CC is the telephone, we recognize that many activities and ways of connecting with the family are part of “care coordination.”

Listed in the ‘*Help Me Grow* Care Coordination’ section below are the many duties that are considered typical activities of the *HMG CC*. You’ll see that these duties often extend beyond providing information, connection to resources, and follow-up on referrals. Care coordination activities also include providing information and education to families, as well as administering developmental screenings.

SPOTLIGHT ON CARE COORDINATION



As *Help Me Grow* Care Coordinators, we work with families and help them plan what THEY want to do. We figure out how we can support them in that plan, and we connect them into the resources to execute the plan.

Rebekah Tucker, *Help Me Grow* Utah Care Coordinator

Typical Duties of an *HMG* CC

- **Provide care coordination for families:** research most appropriate resources, provide education and information on development, behavior management and services, and provide advocacy and follow-up as needed. With client permission, loop client information back to client medical home or social service providers, child welfare workers, childcare and/or early education providers.
- **Assess caller/client situation and enter accurate data** on all calls into the data system.
- **Work closely** with primary care providers, Early Intervention staff, *Help Me Grow* staff, Early Childhood Special Education staff, Maternal Child Health, Department of Public Health staff, and other community agencies or community providers to ensure a smooth referral process for families.
- **Assist in identifying gaps and barriers** to services, as well as system issue trends that families experience in using services.
- **Assist with developmental screening-related activities**, including administration, scoring, sharing results, and linking families to appropriate services

COMPARE / CONTRAST

Information & Referral and *HMG* CC

In a nutshell, Information & Referral (I&R) staff provide information about, and referral to, programs and services. I&Rs are typically high volume services responsible for knowing about and referring to a broad range of services, systems, and resources for residents of all ages within the geographic area covered. Therefore, due to the high volume and scope of work, they do not call families back, loop information back to a client's medical home, or stay connected to families.

HMG CCs do perform those comprehensive tasks. Their work usually takes more time than a typical I&R position.

In 2014, the Centers for Medicare & Medicaid Services released [definitions of both I&R and care coordination](#). You may find this resource useful if you are exploring reimbursement for care coordination services through Medicaid.

HMG CCs develop relationships with families, as they spend time learning about the family's specific circumstances— their needs, where they live, if they have transportation.

Similarly, the linkage process can be lengthy, as the *HMG* CC researches available resources, calls the family back, offers available options, arranges for the family to call the resources, or have resources call them, or provides a conference call.

In addition, *HMG* CCs will seek the family's permission for follow-up to determine the outcome of linkage to recommended resources. The *HMG* CC will also, with permission, loop information back to the referring body, or seek permission to loop child/family information to the primary care provider.

SPOTLIGHT ON CARE COORDINATION



The follow-up piece sets *HMG* CCs apart from a typical I&R hotline. After we find the resources, we call the family back. The follow-up may involve troubleshooting barriers to resources, or empowering a family to advocate for themselves. Sometimes we will advocate on behalf of them if there are significant barriers to the resources.

DESCRIBE

HMG CC Attributes & Skills

These *HMG* CC Attributes were created by members of the *HMG* National Network affiliates. You may find that you need to modify them to meet the needs of your *HMG* system.

Education

- Typically, *HMG* CCs have a Bachelor's degree from an accredited 4-year college or university in social work, early childhood development, special education, or related health or human service field and experience working with children and/or families OR an Associate's degree in early child development or related health or human services field and 3 years of experience working with children and/or families.

Communication Skills

- The ability to listen and speak with empathy and without judgment
- The ability to ask questions and redirect conversation in order to draw out relevant information
- The ability to convey trustworthiness, expertise, and genuine concern
- The ability to adjust language and approach to meet families where they are at
- The ability to convey information clearly, compellingly, and without judgment to families in a range of circumstances

SUGGESTED TRAINING TOPICS: REFLECTIVE LISTENING, MOTIVATIONAL INTERVIEWING, THE FAMILY DEVELOPMENTAL CREDENTIAL

SPOTLIGHT ON CARE COORDINATION



Motivational interviewing includes techniques, such as affirmations, to draw out what somebody is looking for and how they want to improve their life. Affirmations are especially helpful because it's easy to forget that we can be another person praising what families are doing well, not just focusing on what's going wrong.

Maggie Kizer, *Help Me Grow* Washington Bilingual Child Development Specialist

Technology skill and savvy

- *HMG* CCs need to be comfortable and adept at working in databases, navigating the Internet, using a headset, performing online research, and using common technologies such as apps, project management software, and Office products.

Critical reasoning and learning

- The ability to...
 - comprehend, analyze, respond to complex situations to connect families to resources
 - evaluate both family situations and available resources to make successful linkages
 - think creatively and critically to overcome obstacles in linking families to resources
 - learn new content knowledge and new approaches to care coordination

Organization and time management

- The ability to juggle and prioritize a number of tasks
- The ability to balance time taking calls and time for resource research

Teamwork and ability to be coached

- All *HMG* CCs work in collaborative environments. *HMG* CCs share case studies, ask for help, and listen in on each other's calls as needed. Indeed, supervisors listening to a CC handle a call, whether live or taped, is a vital part of training. Note that some I&R centers may not sanction taping calls for training purposes.

No *HMG* CC is ever completely trained; they must be open to supervision and to learning from others and from difficult cases, and growing from those experiences to better link families to services.

SPOTLIGHT ON CARE COORDINATION



As part of the training, new *HMG* CCs listen in on full conversations between families and experienced Care Coordinators. They get to hear how the conversation flows and how to ask probing questions during the intake process. The CC will also participate in mock calls and receive immediate feedback and suggestions from seasoned team members. Once a new CC starts taking calls, all cases are reviewed to ensure quality referral and consistency in our database tracking system.

Cultural awareness

- The ability to receive and convey information clearly, compellingly, and without judgment to families from different backgrounds and in a range of circumstances.

Independence & maturity

- *HMG* CCs work with families who need help. Sometimes the circumstances of their lives are difficult. Sometimes linking families to services takes considerable effort. *HMG* CCs need to be able to handle the emotional and intellectual requirements of the work so that they can best help families. Sometimes that includes knowing when to ask for help from your team.

Deep, ever-growing content knowledge on child development and community resources

- *HMG* CCs develop in-depth knowledge of services, supports, and systems for young children and their families (i.e., eligibility, referral/application processes, due process information, and related support services).

Care coordination case management experience

- Experience gathering information from/finding resources for multiple populations.

SPOTLIGHT ON CARE COORDINATION



As a Care Coordinator, you may encounter very intense family situations. Maybe the resources aren't working out, or the family has personal roadblocks. You just want to fix the problem – but your support has limits. You can connect them to resources, follow up every day if necessary, but you can't fix things. It has to come from them. Your maturity level can help you handle the difficult emotions, and help you discern how you can best support that family.

Rebekah Tucker, *Help Me Grow* Utah Care Coordinator

DESCRIBE

HMG CC Content Knowledge

Help Me Grow systems across the National Network have found the following topics essential to training *HMG* Care Coordinators.

Child development

- Including typical and atypical development
 - o Behavior
 - o Language
 - o Children with special health care needs
 - o Developmental milestones
 - o Developmental concerns

Information on programs and service delivery systems that touch young children and their families, such as

- Early Intervention (Part C)
- Preschool Special Education (Part B)
- Early care and education programs
- Primary health care providers
- Mental health
- Local community-based agencies
- Parent education and support groups
- Health care
- Access to care
- Medicaid/CHIP/insurance coverage
 - o State agency that administers Medicaid/CHIP
- Child welfare agency
- Department of Developmental Services
- Department of Mental Health
- State agency's resources and services (other than the ones listed above)
- Advocacy groups/legal rights organizations

State information

- Criteria for eligibility for programs
- Inclusion/exclusion policies
- Confidentiality

Internal and external referral protocols

- How cases are transferred and/or jointly handled between the comprehensive I&R service and the *HMG* call center (internal) and how to handle all aspects of a family's needs (external)

Strengthening Families Protective Factors Framework

- What they are and how to apply them in work with families

SUGGESTED TRAINING RESOURCE:

CONNECTING VULNERABLE CHILDREN AND FAMILIES TO COMMUNITY-BASED PROGRAMS STRENGTHENS PARENTS' PERCEPTIONS OF PROTECTIVE FACTORS

[INFANTS & YOUNG CHILDREN, VOL. 29, NO. 2](#)

Providing Trauma Informed Care

- Why and what *HMG* CCs should know about toxic stress, psychological trauma and Adverse Childhood Experiences (ACES)

SUGGESTED TRAINING RESOURCE:

RESOURCES FOR CARE COORDINATORS:

PROTECTIVE FACTORS & TRAUMA INFORMED CARE

[6TH ANNUAL HELP ME GROW NATIONAL FORUM, BREAKOUT SESSION 2:3](#)

SPOTLIGHT ON CARE COORDINATION



We constantly connect with our communities through outreach events, site visits, and quarterly lunch-and-learns. It helps our staff to have face time with the people at the resources and to see where the facilities are – to know, literally, where the front door is. We are much more able to link people to resources with a warm hand-off when we make these connections.

Hannah Rivas, 1st Five Iowa Care Coordinator

TRAINING TOPICS FOR CARE COORDINATORS		
Topics	Orientation	Ongoing
Job description, role & responsibilities, and the support/resources available	X	
Skills needed for handling a <i>Help Me Grow</i> call: <ul style="list-style-type: none"> • active listening skills • interviewing techniques • being non-judgemental 	X	X
The questions to ask and how to ask them	X	X
Overview of relevant state-level systems and formal relationships with these systems, in any	X	X
Cultural competence and sensitivity	X	X
Child development & Developmental Screening	X	X
Medical information privacy regulations (HIPAA)	X	X
Chronic health conditions and behavioral health issues of young children	X	X
How to handle difficult callers	X	X
Protocols for handling crisis calls	X	X
Using the resource directory	X	X
How to code cases in the automated client-tracking system	X	X

SPOTLIGHT ON CARE COORDINATION



Our ongoing training includes cultural competency and trauma-informed care. This helps us talk with families in the effective, engaging ways. We often find free cultural competency trainings in the community, and attend an annual conference on trauma-informed care.

Hannah Rivas, 1st Five Iowa Care Coordinator

DEVELOP

HMG CC Training Curriculum

There are two levels of Care Coordinator training:

- Orientation for newly hired staff
- Ongoing training

Vehicles for training Care Coordinators

There are a range of vehicles for training Care Coordinators, such as:

- Reading material
- Staff meetings and in-service days
- Pre/post tests
- Conferences
- Online courses
- Webinars
- Role-playing
- Case studies
- Job shadowing
- Peer-to-peer mentoring
- Call listening
- Case discussion
- Meetings with collaborators
- [Eco-maps](#)

Ideas for Identifying and recruiting trainers

- *Help Me Grow* call center supervisors
- Seasoned care coordinators from both the *Help Me Grow* call center and the call center in which it is embedded (or with whom there is a formal relationship)
- Staff with expertise from direct service agencies, universities, parent and advocacy organizations
- Physician champion
- Representatives from relevant state systems, such as Early Intervention; Preschool Special Education; Early Childhood Comprehensive Systems (ECCS) grant; home visiting programs, including the federal Maternal, Infant and Early Childhood Home Visiting (MIECHV) program; Project LAUNCH; Race to the Top
- AIRS online courses



SUPPORT

National Network Training Manuals

These Care Coordinator training manuals and tools can be used as templates for your *HMG* CC training. Thank you to the affiliate states listed for sharing their training materials so generously!



***Help Me Grow* National Center**

[Training of *HMG* Call Center Care Coordinators: A Comprehensive List of Training Topics](#)

The topics in this list include:

- › Internal office policy/procedures
- › Introduction to the *Help Me Grow* system
- › The basics of telephone care coordination
- › Protocols (both internal and external)
- › Substantive topics
- › Understanding systems that serve children and their families
- › Other issues



***Help Me Grow* Vermont**

[HMG Vermont Child Development Specialist Training Overview](#)

This manual outlines the comprehensive Care Coordinator training developed by *HMG* VT. It covers:

- › The mechanics of the job
- › Information & Referral training
- › *HMG* VT's training materials storage system (trainings, webinars, PowerPoints, *HMG* National resources, customized "help sheets")
- › Orientation and daily checklists for new *HMG* CCs
- › Sample resource directory items
- › Sample printable documents for Parents and Caregivers
- › Sample *HMG* caller intake process and script



Help Me Grow Utah

[Help Me Grow Care Coordination Manual](#)

This 50-page manual covers the high-level concepts behind *HMG* Care Coordination as well as the nuts-and-bolts of the job. Comprehensive sections include:

- › The “why” of Care Coordination
- › Family Database overview
- › Resources and referrals
- › Developmental monitoring
- › Protocols and record-keeping



Help Me Grow Washington

[WithinReach ASQ Training Resources & CC Training Topics](#)

These resources provide information on and grounding in the essential concepts and processes of *HMG WA* Care Coordination. *HMG WA* is housed at *WithinReach*, an organization that connects Washington families to essential food and health resources through programs, coalitions, and tools for individuals and health professionals alike.

Resource items include:

- › WithinReach Training Topics
- › WithinReach ASQ Toolkit
- › WithinReach ASQ Handout for Parents
- › WithinReach ASQ Welcome Email Template
- › WithinReach ASQ Subsequent Email Template
- › WithinReach ASQ Results Call Script – On Track Calls
- › WithinReach ASQ Results Call Script – Monitor or Refer
- › WithinReach ASQ Sample Results Refer
- › [Resource Finder](#) on www.parenthelp123.org,
WithinRead family-facing website



Help Me Grow Orange County

Topics for Child Development Care Coordinator Training

This summary of training topics for new CCs includes:

- › Understanding child development & variations in child development
- › Searching the resource inventory & making accurate referrals
- › Utilizing the System for Tracking Access to Resources (STAR)
- › Communicating via phone & preparing for the initial call

Additional Resources

Strengthening Families Protective Factors

Making the Link: Strengthening Families and *Help Me Grow*

This paper explores how the *HMG* philosophy and model align well with the Strengthening Families mission and Protective Factors.

WWW.STRENGTHENINGFAMILIES.NET

This website offers a rich library of resources to learn about and support implementation of the Strengthening Families Protective Factors Framework

Motivational Interviewing

WWW.CENTERFOREBP.CASE.EDU/PRACTICES/MI

This website thoroughly describes the evidence-based practice of motivational interviewing and offers resources for training.

Reflective Supervision

ZERO TO THREE's 3 Building Blocks of Reflective Supervision

This website outlines the core principles of reflective supervision: reflection, collaboration, and regularity.

FIRST 3 YEARS TX Guidelines for Reflective Supervision

This website offers guidelines to assure that those providing reflective supervision are appropriately trained.

Family Development Credential

National Family Development Credential Program

This program collaborates with agencies to teach family workers how to coach families to set and reach their goals for healthy self-reliance.

USE

Tools of the Trade

Several *Help Me Grow* affiliates have found the following tools especially helpful in developing their Care Coordinator training.

Client Databases

ReferNET This system includes comprehensive Call/Contact, client tracking, call data reporting, resource maintenance, and directory publication modules. *HMG VT* and *HMG OR* use **Refer**, among other affiliates.

STAR *HMG Orange County* developed this web-based comprehensive client database in order to gather information about the children and families served, the referrals and care coordination provided, the communication with primary health care providers, and whether children were connected to services as a result of the referrals. STAR is available to other states in the National Network for an annual subscription and a one-time set-up and customization fee. In 2016, eight *HMG Affiliates* are utilizing STAR to collect and analyze data and to complete the *HMG National Data Indicators* annual report.

Family Database *HMG Utah* developed this database that contains all the information gathered for anyone who connects with *Help Me Grow*. It is available for purchase and modification for other states in the National Network.

Training Systems & Resources

Skyprep *Help Me Grow Utah* uses this online training platform, designed for businesses, and knowledge providers that want to train, test, and manage their employees or clients.

AIRS Online Training *Help Me Grow VT* uses this low-cost resource to train CCs in essential Information & Referral skills transferable to *HMG Care Coordination*.

SPOTLIGHT ON CARE COORDINATION



I highly recommend the AIRS online training for Information & Referral topics. These affordable courses (\$10-\$30 each) cover the the foundation of telephone care coordination. *HMG CC* and *I&R* are not the same thing, but there is overlap in the skills needed to do each job well.

Cathy Nellis, Resource Manager and Trainer, *Help Me Grow Vermont/2-1-1 Vermont*

MEET

6 Help Me Grow Care Coordinators

Thank you to the following HMG Care Coordinators for sharing their time, talent, and experience!



Claudia Estrada
Community Outreach Liaison
(former Care Coordinator)
[HMG Orange County](#)

“An essential skill is knowing how to converse with parents over the phone. It’s also important to gain expertise in child development so you can speak with knowledge to those questions.”



Cathy Nellis
Resource Manager & Trainer,
[HMG Vermont/2-1-1 Vermont](#)

“Knowing how to talk to people is a critical skill. How do you overcome barriers in the conversation? How do you identify emotional or physical barriers? That piece is vital to Care Coordination.”



Hannah Rivas
1st Five Coordinator,
[1st Five Iowa](#)

“We make sure new CCs are trained in motivational interviewing, so they can really meet and support families where they are at.”



Rebekah Tucker
Help Me Grow Care Coordinator
[HMG Utah](#)

“On our team, we are very open to working with each other. We ask for help; we teach each other. The shadowing and mentoring and team meeting that we do really helps.”



Maggie Kizer
Child Development Specialist
[HMG Washington](#)

“It’s powerful to affirm a parent, to say, *Wow, it really sounds like you’re advocating well for your child. You’ve done a lot to support your child’s development. Let’s see what else is out there to help you.*”



Kerry Wels
Parent Educator
[HMG Oregon/211Info](#)

“The bigger 211Info training has been very beneficial to me as a Parent Educator. I can address the many needs a family may have without having to transfer them around the call center.”



Help Me Grow[®]
National Center

Advancing **Developmental Promotion,
Early Detection & Linkage to Services**

www.helpmegrownational.org