

# **FOSTERING GOOD RELATIONS WITH PRIMARY CARE TEAM AND COMMUNITY PARTNERS**

# Session Outline

- Importance of building relationships with PCPs and office staff
- Case examples on CHW communication with PCP offices
- Collaboration with CBOs

# Fostering good relations with the Primary Care Team

## Key strategies

- Get buy-in from the office staff
  - Orientation for office staff on the goals of the project and roles of the CHWs
  - Invite practice staff to sit-in on the health education sessions
  - Involve the practice in recruitment: refer patients who meet the study criteria who come in for office visits
- Provide assistance to office staff that is outside the research
  - Translations of patient notices
  - Updates to patient contact information (phone number/address) or patients who have changed PCPs



# Fostering good relations with the Primary Care Team (continued)

- Facilitate appointment-keeping
  - **Ask about upcoming appointments** and encourage participants to go to them
  - **Identify patients who have not had a recent visit** and schedule them with the provider; schedule patients who are out of medication refills
  - **Schedule appointments with specialists**, and accompany patients on the visit by request

# Fostering good relations with the Primary Care Team (continued)

- Provide updates on patient participation or red flag issues
  - **Bridge communications between patient and provider:** Notify doctors immediately when they take blood pressures in a very high range, when patients report depression symptoms, convey patient concerns and provide regular updates so providers know how their patients are doing
    - Physician offices don't often have the capacity to provide referrals to social services, so CHWs fill in that role. It's important to update the office if such services are necessary for the patient.
  - The participants' doctors can be difficult to reach sometimes due to their busy schedules. Establish good connections with the medical staff to better help your participants.

# Discussion Topic: Case Example on Communicating with PCPs

*Your supervisor asked you to check in with the primary care provider (PCP) at least once per month to provide updates on your meetings with patients and to follow-up about some patient questions/concerns. You showed up at the doctor's office TWICE but they were not able to see you.*



How would you respond?



What strategies would you use to provide important updates to the doctor or to get answers to questions/concerns?



How would you update your supervisor?

# Discussion Topic: Case Example on Communicating with PCPs

## Key strategies

- How to respond
  - Remain professional and understanding, despite the challenges faced with meeting the PCP.
  - Stay persistent in attempting to establish communication the PCP. Give the staff members options for potential meeting time frames to see what works best for them.
- Aligning your communication style to what works best with the practice (in person visit, phone calls, texting, email, etc.)
  - Set a preferred method of communication with physician office to discuss patient updates, summarize interactions, and address any questions you may have for the PCP.
    - Ex: Our CHWs found in person visits and phone calls the most helpful because they networked with the office managers and physicians' families since they belonged to the same community. Do what works best for the practice.
  - Convey that it's a tailored approach based on many factors (practice size, doctors' interests, communication styles). Directly ask what doctors want to know from CHWs.
- How to update your supervisor
  - Provide regular updates to your supervisor outlining your efforts to connect with the PCP and the challenges faced in scheduling meetings.
  - Offer alternative communication methods or suggest discussing the situation with the supervisor to explore potential solutions.

# How can CHWs/Projects and Community Based Organizations (CBOS) Collaborate?

**CHWs can provide assistance to CBOs that is outside the research, such as sharing materials to disseminate to their clients/community that are translated and culturally appropriate, including:**

- Disseminating education materials/videos (Plate Planners, BP Tracking Cards, etc)
- Sharing community resources guides and information on referrals
- CHWs/research teams can help CBOs with their own data collection, needs assessments, and training with grant applications
- Supporting community health events, health fairs – eg, providing blood pressure screening, health coaching
- Some CHWs are also trained as health insurance navigators and can provide this service



# How can CHWs/Projects and Community Based Organizations (CBOs) Collaborate?

**There is a mutually beneficial relationship between CBOs and CHWs. CBOs can provide space for CHWs to:**

- Recruit participants. CBOs themselves can be referral sites for CHW participants
- Host health education workshops
- Host health promotion activities (e.g., exercise workshops, walking groups, cooking demonstrations, etc.)

**CBOs can get the word out to communities and to the media about project-related opportunities and events:**

- Community forums about a particular health topic, physician-led health 101 talks, or reports on research findings in the community
- Update the CBOs about our projects/research so they can spread the word

# Discussion Topic: Case Example on Outreach to a New Community Organization



*You are asked to reach out to a community-based organization (CBO) that provides services to the community members/patients you work with. You have never worked with them before, and you don't have any contacts directly at the organization.*

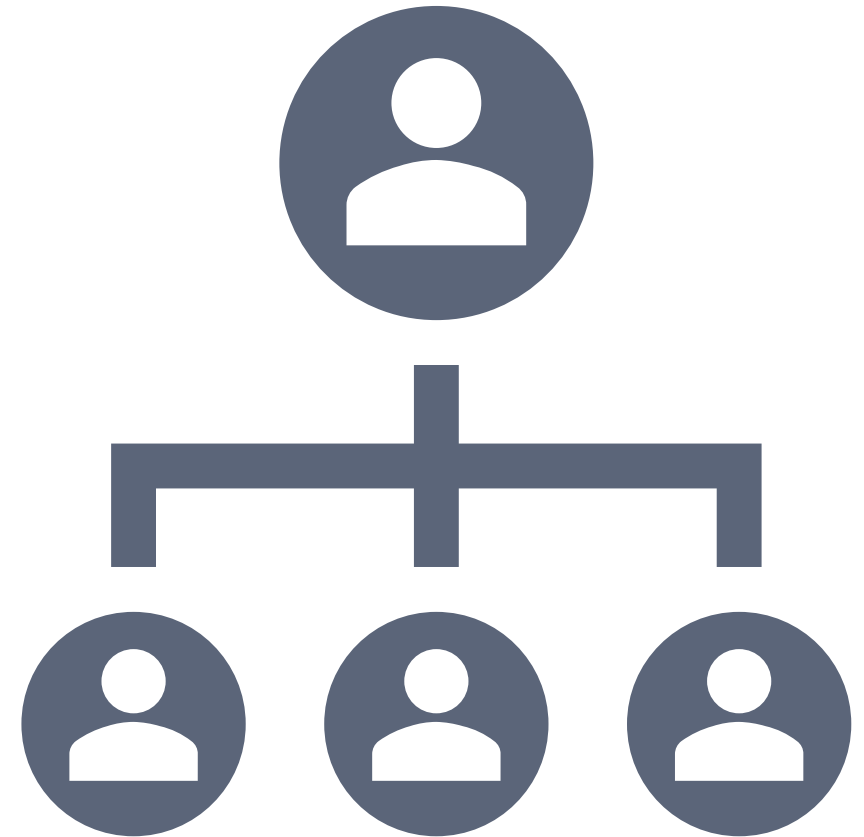


*What are some ways to engage this organization and identify potential ways to collaborate?*

# Discussion Topic: Case Example on Outreach to a New Community Organization

## Facilitation Strategies

- Get details about the organization (contact info, leaders, etc) from the community members you work with since they will most likely be connected to the CBOs serving them
- Attend CBO meetings and events
  - This is a great opportunity to distribute flyers and talk about the work you do as a CHW
- Once you contact someone from the CBO, explain why it's important to build a partnership, and the benefits for the community members



# Reaching out to Media

- Reaching out to media can be a great way to raise awareness about your program and to disseminate results to the public
- For past DREAM projects, we have reached out to media outlets in the following situations:
  - To raise awareness of during our recruitment phase
  - To better inform the public about the role of CHWs
  - To advertise community health forums and disseminate results
  - To raise awareness on various health initiatives

# Best Practices for Reaching Out to Media

## Reaching out and creating new media contacts

- Research and Prepare: Understand the media outlets relevant to your community. Research their focus, target audience, and recent coverage.
- Networking: Find your media contacts through personal relationships, friends, and previous organizations you worked with:
  - Ex: Our CHWs personally knew the editors of local community newspaper.
  - Attend local community events, health fairs, and seminars to connect with media professionals serving your target population.
- Follow and engage with local media outlets on social media platforms to build relationships.

## Strategies to Overcome Barriers

- Time Constraints: Plan ahead to ensure you have adequate time to prepare your materials for the media
- Lack of Response: If media outlets don't respond, follow up politely to reiterate your program's value for the community
- Limited Media Interest: Frame your pitch to align with current trends or public health concerns to increase its value