

Washington Association for Community Health  
 June 2021  
[www.collaborativescreening.com](http://www.collaborativescreening.com)

### Collaborative Screening | Learning Objectives

- Consider the incentives and impacts of conducting social needs, demographic and behavior screenings for both individuals and organizations
- Discuss core design principles and skills for person-centered screening and referral
- Explore person-centered workflow and organizational design
- Practice person-centered screening and referral
- Develop next steps in creating a more person-centered approach at your health center

### Session 1 | June 21

#### Learning Objectives:

- Explore the impacts of social needs on health, value-based health care and health equity
- Share insights and perspectives about social determinants of health surfaced in 2020
- Review the purpose and spirit of Collaborative Screening
- Describe the design principles and behavioral guidance for conducting person-centered social needs screening and referral conversations
- Review the Collaborative Screening and Referral Conversation Guide

Time	Topic & Objective	Method
35 minutes	<b>Welcome &amp; Introduction</b> <ul style="list-style-type: none"> <li>• Learn about Ariel, this training and our virtual tools               <ul style="list-style-type: none"> <li>○ Zoom</li> <li>○ Mural</li> </ul> </li> <li>• Introduce Popular Education               <ul style="list-style-type: none"> <li>○ Share philosophy and goals of PE</li> <li>○ Introduce dinámicas</li> </ul> </li> <li>• Create shared expectations of the day through Group Agreements</li> <li>• Break the ice and start to learn about your peers</li> </ul>	<ul style="list-style-type: none"> <li>• Lecture</li> <li>• Group Agreement</li> <li>• Poll</li> </ul>
30 minutes	<b>Upstream Health &amp; Health System Pressures</b> <ul style="list-style-type: none"> <li>• Learn and share perspectives on:               <ul style="list-style-type: none"> <li>○ The day-to-day context and constraints of patients and professionals.</li> <li>○ The impact of social factors on health and health care</li> <li>○ Discuss big-picture drivers of health system transformation: VBPC, health equity and whole person health</li> </ul> </li> <li>• Review and discuss PRAPARE social needs screening tool</li> <li>• Discuss and acknowledge the power dynamics between patients and health care professional</li> </ul>	<ul style="list-style-type: none"> <li>• Large group discussion</li> <li>• Lecture</li> </ul>
10 minutes	<b>Tech Break</b>	
25 minutes	<b>Radio Play: Design Principles for Person-Centered Screening Conversations</b> <ul style="list-style-type: none"> <li>• Introduce Collaborative Screening</li> <li>• Learn the advice and recommendations of professionals and patients for conducting person-centered screening conversations</li> </ul>	<ul style="list-style-type: none"> <li>• Radio play</li> <li>• Group Discussion</li> </ul>

5 minutes	<b>Energizer</b>	<ul style="list-style-type: none"> <li>Dinámica</li> </ul>
15 minutes	<b>Debrief</b>	<ul style="list-style-type: none"> <li>Group Discussion</li> </ul>
40 minutes	<b>Collaborative Screening Conversation Guide</b> <ul style="list-style-type: none"> <li>Review Collaborative Screening conversation guide with an emphasis on trauma-informed and strengths-based elements</li> </ul>	<ul style="list-style-type: none"> <li>Group Discussion</li> <li>Lecture</li> </ul>
5 minutes	<b>Wrap up and prep for next time</b>	<ul style="list-style-type: none"> <li>Discussion</li> </ul>

## Session 2 | June 23

### Learning Objectives:

- Develop a connection between organizational mission and person-centered care
- Develop a connection between person-centered care and your personal strengths
- Learn and practice reflective listening to convey empathy and non-judgmental listening
- Practice Collaborative Screening and Referral

Time	Topic & Objective	Method
20 minutes	<b>Welcome Back</b>	<ul style="list-style-type: none"> <li>Dinámica</li> <li>Group Discussion</li> </ul>
30 minutes	<b>Spirit of Patient-Centered Care</b> <ul style="list-style-type: none"> <li>Find a personal and organizational connection to the heart of patient-centered care</li> <li>Share inspiration with others</li> </ul>	<ul style="list-style-type: none"> <li>Video</li> <li>Personal reflections</li> <li>Group Discussion</li> </ul>
5 minutes	<b>Energizer</b>	<ul style="list-style-type: none"> <li>Dinámica</li> </ul>
30 minutes	<b>Reflective Listening</b> <ul style="list-style-type: none"> <li>Provide instructions and examples</li> <li>Practice using Humans of New York round-robin</li> </ul>	<ul style="list-style-type: none"> <li>Lecture</li> <li>Skill-based practice: individual and popcorn-style sharing</li> </ul>
10 minutes	<b>Tech Break</b>	
15 minutes	<b>Collaborative Screening Demonstration and Instructions</b>	<ul style="list-style-type: none"> <li>Video</li> </ul>
45 minutes	<b>Collaborative Screening Practice</b>	<ul style="list-style-type: none"> <li>Conduct role-plays in breakout rooms</li> </ul>
15 minutes	<b>Debrief</b>	<ul style="list-style-type: none"> <li>Group Discussion</li> </ul>
5 minutes	<b>Wrap up and prep for next time</b>	<ul style="list-style-type: none"> <li>Discussion</li> </ul>

## Session 3 | June 25

### Learning Objectives:

- Explore the power of empathy, and the difference between empathy, sympathy and identifying
- Describe the design principles and behavioral guidance for conducting person-centered screening and referral system design
- Develop a workplan to establish or improve a person-centered approach to screening and referral at your health center

- Learn from peers about different approaches across health centers

Time	Topic & Objective	Method
20 minutes	<b>Welcome Back</b>	<ul style="list-style-type: none"> <li>• Dinámica</li> <li>• Group Discussion</li> </ul>
20 minutes	<b>Re-center Empathy</b> <ul style="list-style-type: none"> <li>• Define empathy and how it's different from sympathy</li> <li>• Discuss the power of Empathy to support connection</li> </ul>	<ul style="list-style-type: none"> <li>• Video</li> <li>• Group Discussion</li> </ul>
35 minutes	<b>Creating Person-Centered Organizational Systems</b> <ul style="list-style-type: none"> <li>• Explore design principles for person-centered system design</li> <li>• Learn about a health center's successful implementation of patient-centered workflow using Collaborative Screening</li> </ul>	<ul style="list-style-type: none"> <li>• Radio play</li> <li>• Group Discussion</li> </ul>
10 minutes	<b>Energizer</b>	<ul style="list-style-type: none"> <li>• Dinamica</li> </ul>
10 minutes	<b>Tech Break</b>	
30 minutes	<b>Planning Time</b> <ul style="list-style-type: none"> <li>• Reflect on the status of workflows at your organization</li> <li>• Brainstorm how to apply the Collaborative Screening approach to improve your current social needs and other type of screening workflows</li> </ul>	<ul style="list-style-type: none"> <li>• Small group discussion</li> </ul>
10 minutes	<b>Evaluation</b>	<ul style="list-style-type: none"> <li>• Online Survey</li> </ul>
40 minutes	<b>Report Out</b> <ul style="list-style-type: none"> <li>• Share out plans for implementation of patient-centered screening</li> </ul>	<ul style="list-style-type: none"> <li>• Round Robin</li> <li>• Large group discussion</li> </ul>
5 minutes	<b>Wrap Up</b>	<ul style="list-style-type: none"> <li>• Discussion and kudos!</li> </ul>