



# Case STUDY

 **Learning Systems**  
for Accountable Care Organizations

## Coastal Medical’s Leadership Academies: Investing in Staff Development and Collaboration

This case study describes Coastal Medical’s Leadership Academies, which are monthly discussion-oriented meetings that help to increase collaboration among staff and to cultivate their leadership skills. In recent years, Coastal Medical has been operating Leadership Academies that have facilitated the implementation of practice redesign projects, enhanced staff management skills, and promoted culture change to affect improvement in the delivery of care. Coastal Medical’s experience can be useful to other accountable care organizations that are looking to develop their staff’s leadership skills and to encourage practice redesign.

### OVERVIEW

Coastal Medical (“Coastal”) operates Leadership Academies (“Academies”), a monthly meeting series that builds staff leadership skills through discussions about applying management theory to real-world workplace situations. Each Academy targets a specific staff position or type, including practice managers, corporate and clinical managers, and practice staff below the manager level. Coastal found that the Academies helped participants to implement practice redesign, increased their skills and confidence, fostered collaboration, and led to significant positive culture change. Overall, the Leadership Academies created “a grassroots structure for positive change” in the accountable care organization (ACO) and increased staff buy-in, according to Meryl Moss, Coastal’s Chief Operating Officer (COO) and designer of the Academies. This

case study describes Coastal Medical, traces the development of the Academies, and identifies key lessons learned from the initiative.

### COASTAL MEDICAL BACKGROUND

Coastal Medical is a primary care-driven medical organization that serves about 10,000 ACO beneficiaries across Rhode Island. Coastal joined Track 1 of the Medicare Shared Savings Program in 2012 (initially in the Advance Payment Model) and moved to the Track 1+ Model in 2018. Over this period, the ACO demonstrated high quality scores and earned over \$13.5 million in shared savings payments. Coastal currently has about 20 practice locations and employs 145 practitioners, more than 90 percent of whom are primary care providers. Fostering a culture of teamwork, innovation, and shared learning is a central part of Coastal’s mission.

*“I think Coastal is such a successful ACO because everyone is involved at every level. Giving employees a voice has helped us implement changes. Having everyone involved contributes to the ACO’s success because we’ve all bought into it and believe in it. We all know this is what’s right for the patient.”*

—Leadership Academy participant

## DEVELOPMENT OF LEADERSHIP ACADEMIES

Coastal began to provide leadership training to staff who led practice redesign projects. Recognizing the beneficial impact of these trainings, the ACO expanded and formalized them to create its ongoing Leadership Academies. The first Academy was for practice managers, and it began with the primary goal of helping them to implement specific practice redesign projects. As the Coastal leadership both received positive feedback from participants and observed additional positive impacts (for example, improvements in participants’ management skills), they decided to continue the Academy for practice managers and to establish additional Academies for other staff (see the chronology in Figure 1). The following sections explain how Coastal developed its Leadership Academies to enable staff to improve care delivery and strengthen their leadership skills.

### Identifying the Value of Training

In 2016, the Coastal leadership invited staff from across the ACO to a meeting to both identify potential practice redesign projects and discuss initiatives to pilot test these projects. The projects focused mainly on improving patient experience, such as implementing phone scripting to streamline the handling of patients’ calls, centralizing and tracking referrals, developing an online system for patients’ forms and for booking appointments, and using new screening tools for behavioral health. Coastal’s

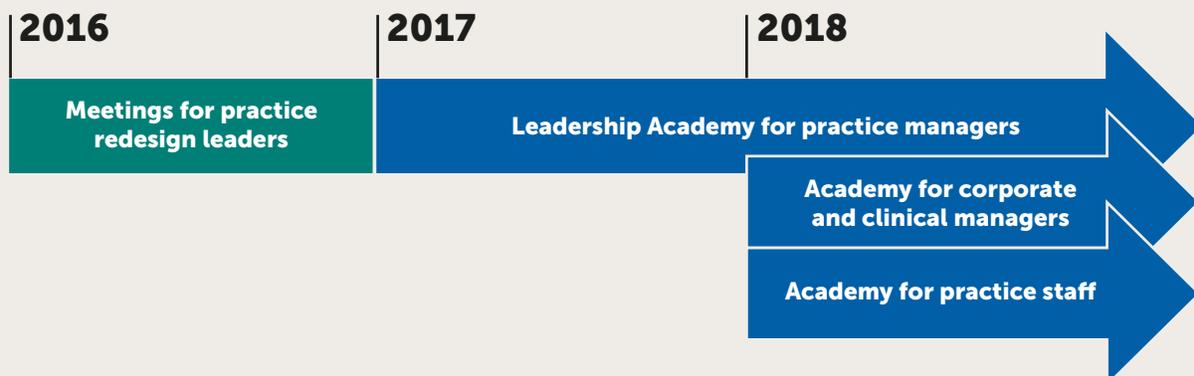
employees volunteered to lead each project and took responsibility for guiding teams of individuals from across the ACO to conceptualize and launch each project. The volunteers were highly motivated, but Coastal’s COO noticed that they faced similar challenges and would therefore benefit from training to effectively lead such complex, multi-department initiatives.

Acting on this observation, Coastal organized a monthly group meeting of all the leads of the redesign projects in order to discuss challenges and to provide training in leadership and management skills. The meetings addressed topics such as how to build and engage high-functioning teams and how to effectively facilitate meetings. Coastal found that the meetings supported the implementation of the redesign projects, increased the skills and confidence of the project leads, and built valuable connections between participating staff. A few project leads who also served as practice managers observed that similar meetings would be useful to other practice managers, who were supporting the redesign projects in their practices. Coastal then decided to expand the leadership training to all practice managers.

### What are Coastal Medical’s Leadership Academies?

- Include series of monthly, hour-long meetings that are discussion-oriented and collaborative, and that address workplace management challenges
- Target employees playing similar roles within the ACO
- Led by the COO, with facilitation support from the Director of Practice Management and the Director of Human Resources
- Focus on discussing leadership skills and staff development, often centering on specific and real-life examples faced by participants
- Formally recognize participants for completing a meeting series

**Figure 1**  
**Development of Coastal Medical’s Leadership Academies**



## Implementing Leadership Academies

Coastal formalized the meetings with the practice redesign leads to create an ongoing leadership training program called the Leadership Academies. Although the Academies were initially for practice managers only, the ACO soon offered additional Academies to provide training meetings for corporate and clinical managers, as well as practice staff below the manager level. The monthly meetings focus on discussion-based learning and applying management theory to the participants' real-world situations and challenges. The COO chooses topics for a meeting based on current issues that participants are encountering, and encourages the participants to share their experiences and learn from each other (for examples of topics, see Figure 2 on the following page). Coastal formally recognizes the staff for participating in the Academy, giving them certificates, for instance, for attending a certain number of meetings and by acknowledging their participation at broader staff meetings.

*“At first, our Leadership Academy goals were very concrete—we wanted to accomplish our redesign projects in ways that supported the inclusive culture of the organization. Now it’s really about complete engagement with our staff.”*

—Meryl Moss, COO of Coastal Medical

## Current Leadership Academies

Coastal currently operates the three Leadership Academies described below. Each one consists of monthly in-person, one-hour meetings, which are led by the COO, with facilitation support from the Director of Practice Management and the Director of Human Resources.

- Practice Manager Leadership Academy.** This Academy initially provided training in the skills necessary for practice managers to implement the redesign projects in their practices. The participants responded positively to the Academy, remaining engaged in the discussions and attending meetings regularly. Coastal continued the Academy after implementing its practice redesign projects, offering trainings to practice managers on a variety of management theories and techniques. Instead of focusing on implementing specific projects, Coastal expanded the meetings' scope to focus on building staff confidence and leadership skills. The meetings also develop support networks among practice managers, which allow them to learn from each other's experiences between meetings.

- Corporate and Clinical Managers Leadership Academy.** Coastal created this Academy for corporate and clinical

managers as a way to facilitate their growth from their roles as subject matter experts (such as pharmacist or information technology professional) to effective leaders. Many of them began to shift to their new roles without the benefit of a deep understanding of team management strategies. The Academy helps to elevate these staff to management positions by training them to effectively lead teams and programs.

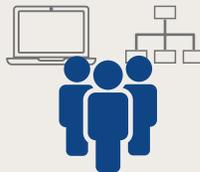
- Practice Staff Leadership Academy.** Practice-based support staff observed the benefits of the Practice Manager Leadership Academy and requested their own training meetings. Coastal responded by offering the Practice Staff Leadership Academy to train these staff in strategies for effectively contributing to their teams. Discussion topics include setting personal goals, becoming a problem solver, and developing leadership skills to progress within the ACO. Although the other Academies occur during business hours, the Practice Staff Leadership Academy takes place during the late afternoon or early morning, which averts any coverage issues that might otherwise arise during Academy time.

### Academy Participants' Roles at Coastal



#### Practice managers

- Direct each of Coastal's approximately 20 practices
- Have varied professional backgrounds (for example, some of them are registered nurses)



#### Corporate and clinical managers

- Are in charge of various programs or departments at Coastal
- Examples of corporate managers are Coastal's data manager, information technology manager, and human resources manager
- Examples of clinical managers are those who direct the diabetes, pharmacy, and transitions of care programs



#### Practice staff

- Are medical assistants and clerical staff
- Support operations at each of Coastal's practices

**Figure 2**  
**Examples of Topics in the Leadership Academies**

-  **Setting goals and framing problems**
-  **Organizing work effectively so that others have concrete guidance and direction**
-  **Conducting performance reviews**
-  **Having difficult conversations with staff and physicians**
-  **Creating and being a part of high-functioning teams**
-  **Facilitating meetings**
-  **Resolving conflicts**
-  **Increasing collaboration between practices and departments**

## STRATEGIES AND LESSONS LEARNED

The Coastal leaders who organize the Academies identified several lessons learned from facilitating the meetings. They highlighted the importance of creating a safe environment in which staff can freely discuss with ACO leadership the challenges they face without having to fear for their own careers. **Academy organizers encourage participants to share their experiences and strategies in relation to real-life challenges.** In addition, Academy organizers emphasize the importance of listening openly and without expressing criticism to brainstormed ideas in order to build trust and make conversations more fruitful. As participants candidly engage in discussion, Academy organizers have also solicited their feedback about potential improvement opportunities across the ACO.

Coastal identified several strategies that helped Academy participants to use the skills they learned in the Academies in their day-to-day work. **The ACO found that, instead of**

**discussing management theory in the abstract, practical discussions through which the staff can learn to apply their skills to their everyday challenges were impactful.** Providing assignments to be completed between meetings also encouraged staff to apply the lessons they learned. For example, after one meeting, Coastal asked staff to have a difficult conversation with another staff member, which they then discussed at the next Academy meeting.

Academy organizers acknowledged that planning and holding multiple monthly hour-long meetings is time intensive, but they view this time as an important investment in staff development and beneficial to the success of quality improvement initiatives across the organization. Although Coastal’s relatively small size and coverage area support frequent in-person meetings, the Academy organizers were confident that the lessons they learned apply to ACOs that are contending with different geography (and might be therefore able to conduct virtual, regional, and/or less frequent meetings).

*“When I talk to people from other organizations about our Leadership Academies, some say, ‘We can’t do that. That’s just too much work.’ But it actually has been less work because the Academies are what have enabled us to implement our practice redesign efforts and new initiatives.”*

—Meryl Moss, COO of Coastal Medical

Overall, although Coastal tailored the content of each Leadership Academy to the needs of the different roles of participating staff, the ACO found that emphasizing collaboration, cultivating staff leadership skills, and building a culture of learning and improvement were applicable across all Academies.

## IMPACT OF LEADERSHIP ACADEMIES

Coastal Medical found that the Leadership Academies encouraged a culture of collaboration and supported the ACO’s transition to value-based care by shifting away from top-down improvement processes. The ACO pointed to the Academies as key not only to successful implementation of the practice redesign projects begun in 2016 but also to getting the staff excited about continued improvement efforts. As Marilyn Boichat, Coastal’s Director of Practice Management, noted, “It’s now easier for us to implement new initiatives. People have become very willing to try making changes—including, for example, using new technology. The Academies created an environment in which learning is expected.”

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*“The Academies changed the landscape of the organization, as decisions aren’t made top-down. They’re made with employees, so you’re part of the change that’s happening. You’re not being told there’s a change. You’re implementing and supporting it. We work through changes together and implement them as a group.”*

—Leadership Academy participant

Coastal also observed that the Academies changed the dynamic between the ACO leadership and practice-level staff. Participants recognized that the ACO leadership is invested in building their skills and values their input. Coastal described suggestions received from staff during the Academies that led to organizational changes geared to improving employee experiences and retention. For example, the ACO asked participants in the Practice Staff Leadership Academy to candidly suggest ways that the ACO could improve employee satisfaction. Coastal then explored their suggestions with additional staff and ultimately implemented several changes to its human resources policies, such as employee cost-sharing for health insurance.

Academy participants, as well as the physicians that they support, reported that the Academies empowered participants

to take leadership roles on teams that are implementing projects and collaborate with their peers to identify improvement opportunities. Participants also reported that, beyond the meetings, the Academies created strong mentoring relationships and camaraderie among staff. As one participant noted, the Academy provided “hands-on learning experience about how to implement change in a practice” and created a network of colleagues with whom participants could discuss challenges during and between meetings. A participant in the Practice Manager Leadership Academy observed, “Now, it’s not uncommon for staff to say, ‘It seems like there might be another way we could do this.’ While that used to be scary to a lot of people, it’s now exciting. The Academies created such a comfort level with change. . . . It’s part of the work.”

## NEXT STEPS

Coastal leadership continues to view the Academies as foundational to its ongoing efforts to collaborate with staff, build staff skills, and elicit input about improvements for the ACO to consider. Coastal plans to continue the monthly meetings of its three Leadership Academies, given their positive impacts on the ACO culture and the participants’ strong interest in additional meetings. It has also just begun a fourth Academy for billing staff. In addition, Coastal is expanding the Practice Staff Leadership Academy by holding a second monthly session to accommodate schedules of additional practice staff interested in participating.

### About the ACO Learning Systems project

This case study was prepared on behalf of CMS’s Innovation Center by Rivka Weiser and Julia Embry of Mathematica Policy Research under the Learning Systems for ACOs contract (HHSM-500-2014-000341/ HHSM-500-T0006). CMS released this case study in March 2019. We are tremendously grateful to the many staff from Coastal Medical ACO for participating in this case study.

**For more information, contact the ACO Learning System at [ACOLearningActivities@mathematica-mpr.com](mailto:ACOLearningActivities@mathematica-mpr.com).**