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AHRQ's Practice Facilitation Handbook: A Resource for New Facilitators and Their Trainers

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Agency for Healthcare Research and Quality**

Sponsored by the AHRQ PBRN Resource Center
November 15, 2013



Agenda

- Welcome, Introductions and Instructions for Question Submission
 - ▶ Rebecca Roper, MS, MPH, Director, AHRQ Practice-Based Research Network Initiative

- Presentation
 - ▶ Cindy Brach, MPP
 - ▶ Lyndee Knox, PhD

- Questions and Answers

- Update on Current AHRQ Work
 - ▶ Robert McNellis, MPH, PA

- Instructions for Obtaining CME Credits



AHRQ's Practice Facilitation Handbook: A Resource for New Facilitators and Their Trainers



Cindy Brach, AHRQ
Lyndee Knox, LA Net





Overview

- Introduction to Practice Facilitation
- Background and Orientation to Practice Facilitation Handbook
- Overview of Practice Facilitation Process
 - Kickoff meeting
- Core Competencies
 - Mapping and Redesigning Workflow
- Intervention-specific Competencies
 - Facilitating Panel Management



What is Practice Facilitation?

PF builds organizational capacity in practices for continuous quality improvement.

“It’s self-management support for practices instead of patients.”

Grace Floutsis

Chief Medical Officer at a

Federally Qualified Health Center



Why Practice Facilitation?

Quality improvement is elusive.

- Redesign is complex
- Change management expertise
- Tailoring
- Focus



An Old Idea with New Appeal

- Been around at least 25 years (e.g., Fullard et al. BMJ. 1984; 289:1585)
 - Growing evidence base
- Increased emphasis on improving chronic care and implementing PCMH
- Lever to implement health care reform
 - Growing number of practice facilitation programs

Practice Facilitation Locations (Partial List)





What Are Practice Facilitators?

- Specially trained individuals who work with practices to make meaningful changes designed to improve patient outcomes
 - Darren DeWalt
- PFs develop long-term relationships with practices, e.g. they “have the combo to the back door. They move in and out of a practice as the need arises.”



What Do Facilitators Do?

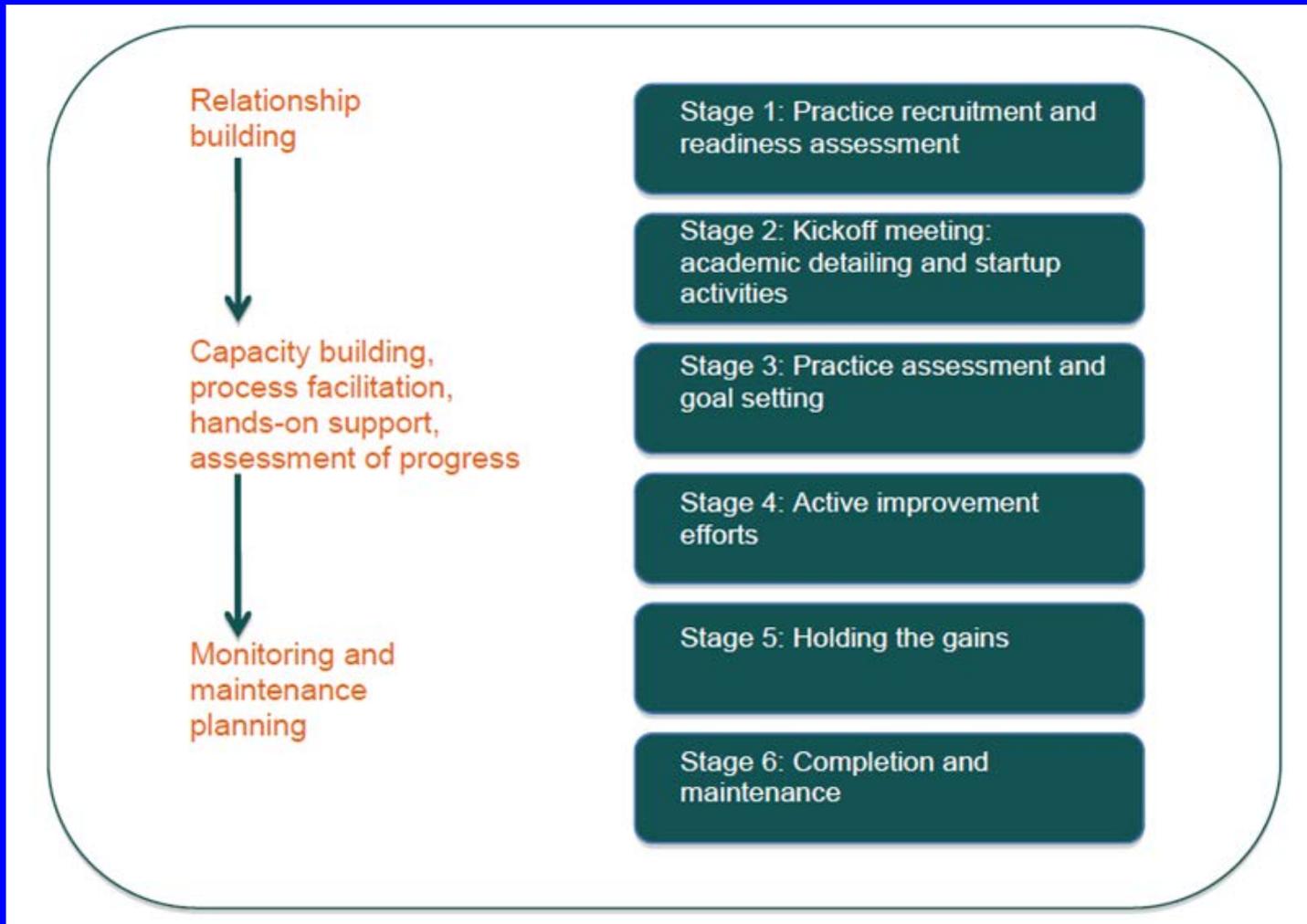
- Form and train QI teams
 - Manage improvement projects
 - Create systems for generating QI data
- Conduct practice assessments
- Facilitate meetings
- Broker and engage resources
- Executive coaching



More Facilitator Activities

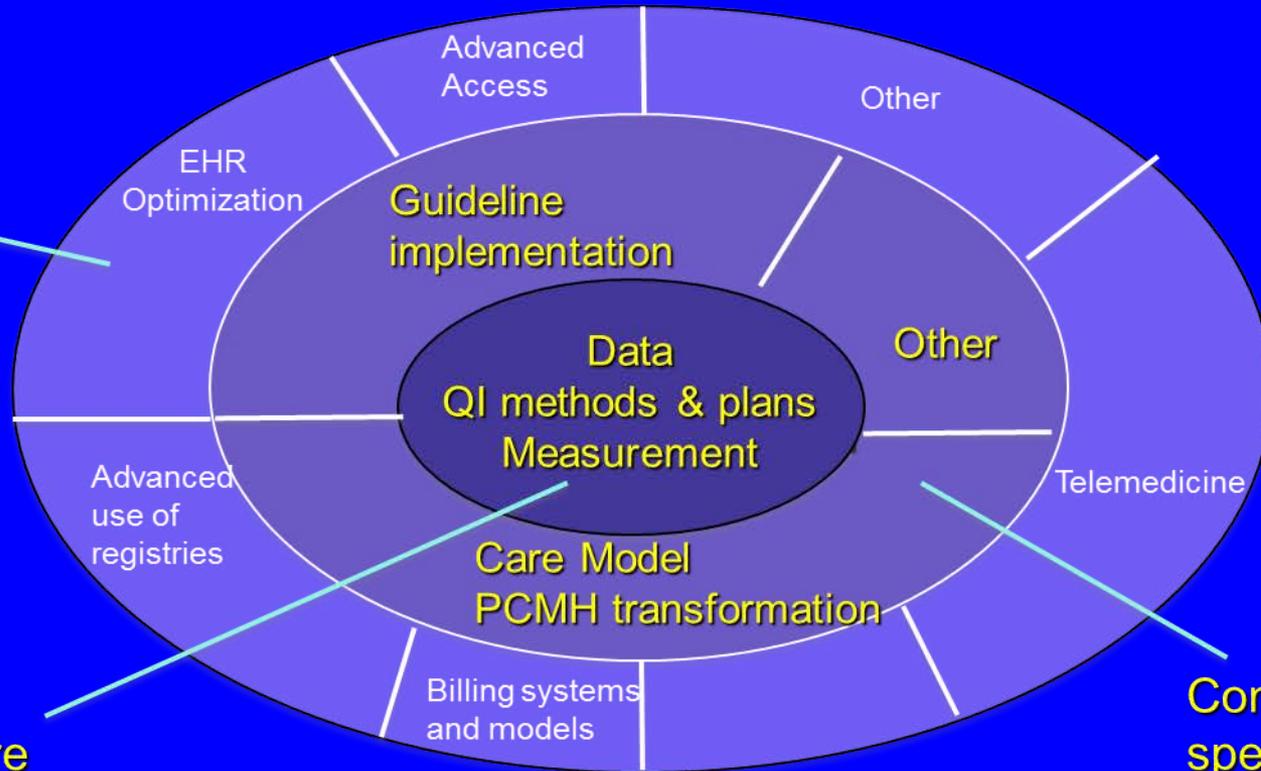
- Optimize health IT systems for QI and population management
- Deep TA in implementing key elements of the PCMH
 - Team-based care
 - Panel management
 - Care coordination (etc.)
- Integrate across change efforts
- Research assistance
- Identify and spread “best practices”

Phases of Practice Facilitation



Practice Facilitator Competencies

Highly specialized processes



Core competencies

Competencies specific to a particular intervention



How Are Facilitators Currently Trained?

- No standardized approach
 - 2-day workshops to multi-year professional development courses
- Scattered resources
- Informal information exchanges

Practice Facilitation Handbook

The Practice Facilitation Handbook

Training Modules for New Facilitators and Their Trainers



- Textbook and Trainer's Guide
- Uses adult education methods
- Based on training developed for PF's implementing the chronic care model in CHCs
- Builds on and "curates" the best of existing PF resources



Genesis of Practice Facilitation Handbook

- Content developed based on AHRQ Consensus Meeting



Consensus Panel Members

Veenu Aulakh, MPH

Michael Barr, MD

Tom Bodenheimer, MD

Adrienne Bowes, RN

Cindy Brach, MPP

Cathy Catrambone, PhD

Sophia Chang, MD

Ellen Christiansen, FNP

Katie Coleman, MSPH

Darren DeWalt, MD

Cindy Dickinson, FNP

Perry Dickinson, MD

Douglas Eby, MD

Grace Floutsis, MD

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June Levine, RN, MSN

Lisa M Letourneau, MD

Clare Liddy, MD

James Mold, MD

Trish O'Brien

Roland Palencia

Kevin Peterson, MD

Kelly Pfeifer, MD

Mary Ruhe, RN

Richard Seidman, MD

Corey Sevin, RN

Leif Solberg, MD

Neil Soloman, MD

Carolyn Shepherd, MD

Katy D. Smith, M

Elizabeth Stewart, PhD



Genesis of Practice Facilitation Handbook

- Content developed based on AHRQ Consensus Meeting
- Supplemented by “lived experience” of PF demonstration to implement Care Model in CHCs using AHRQ toolkit/resources



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Purpose of Handbook

- Practice Facilitation101
 - For new PFs
- Provide resource to help organizations start a PF workforce
- To “curate” some of best resources for training PFs



Handbook Content

21 training modules (40-120 mins each)

- Part 1: Introduction
- Part 2: Core Competencies
- Part 3: In the Practice
- Part 4: Care Model and PCMH



Structure of Handbook

- Flexible. Can be used:
 - Self-study
 - In stand-and-deliver classroom setting
 - Virtual classroom
 - To supplement existing training program
- Organization
 - Trainer's Guide
 - Topic synopsis

Trainer's Guides

Module 3 Trainer's Guide: An Overview of the Facilitation Process

Time

- Pre-session preparation for learners: 15 minutes
- Session: 60 minutes

Materials Checklist

- Computer with Internet access, projector, or other video capacity
- Online access to:
 - Hindmarsh M. Using self-management support in your coaching approach. QIIP Practice Facilitator Training; 2008 May 12-13; Toronto, ON. See Appendix.

Objectives

Learners will be able to:

- List the stages in a typical facilitation process and describe their purpose and content.
- Name and describe three characteristics of effective facilitation.
- Identify at least three frequently encountered challenges to improvement.

Exercises and Activities To Complete Before and During the Session

Pre-session Preparation

Read (15 minutes)

1. Module 3.

During the Session

Present/review (30 minutes)

1. Module 3.
2. Hindmarsh M. Using self-management support in your coaching approach. QIIP Practice Facilitator Training; 2008 May 12-13; Toronto, ON. See Appendix.

Discuss (30 minutes)

1. What are the different stages of a facilitation intervention?
2. What challenges might you experience during the different stages of the facilitation process? Which stage do you expect will be easiest for you? The most difficult?
3. Discuss the Hindmarsh slide deck. Ask learners the following questions:
 - In what ways are the 5 A's for self-management support applicable to practice facilitation?
 - How does this change (or not change) your understanding of facilitation and the work you will be doing with practices?

- Time and materials requirements
- Objectives
- Exercises and activities before and during session
- Presentation ideas
- Discussion questions

Workforce Start-up for LA Net



- New PF training for LA Net
 - Weekly in-person trainings at LA Net office, supplemented with:
 - Outside faculty (Jim Mold)
 - Best-practice spread sessions





Workforce Cross-Training at VA



- Start-up of PF program at Greater LA VA
 - 7 new PFs, with other duties in the 9 sites
 - Virtual sessions using video-conferencing & phone, recorded & archived
 - Handbook used to supplement existing training materials within VA
 - What is PF
 - Workflow mapping
 - Helping teamlets Huddle

To start a PF Certificate program at a University*



- Millard Fillmore, SUNY Buffalo
 - Efficient for university to implement (Handbook=curriculum)
 - Delivered easily in 12-week virtual classroom
 - Open to their students and anyone else across country
 - Workforce development for area
- Universities in other areas of country considering partnering

* Project of CoCoNet2



Part 2: Core Competencies

- 4: Approaches to Quality Improvement
- 5: Mapping and Redesigning Workflow
- 6: Assessing Practices
- 7: Measuring and Benchmarking Clinical Performance
- 8: Collecting Data with Chart Audits
- 9: Preparing and Presenting Data
- 10: Academic Detailing as a QI Tool



Module 5: Mapping and Redesigning Workflow

■ Goals

- Improving performance
- Increasing efficiency

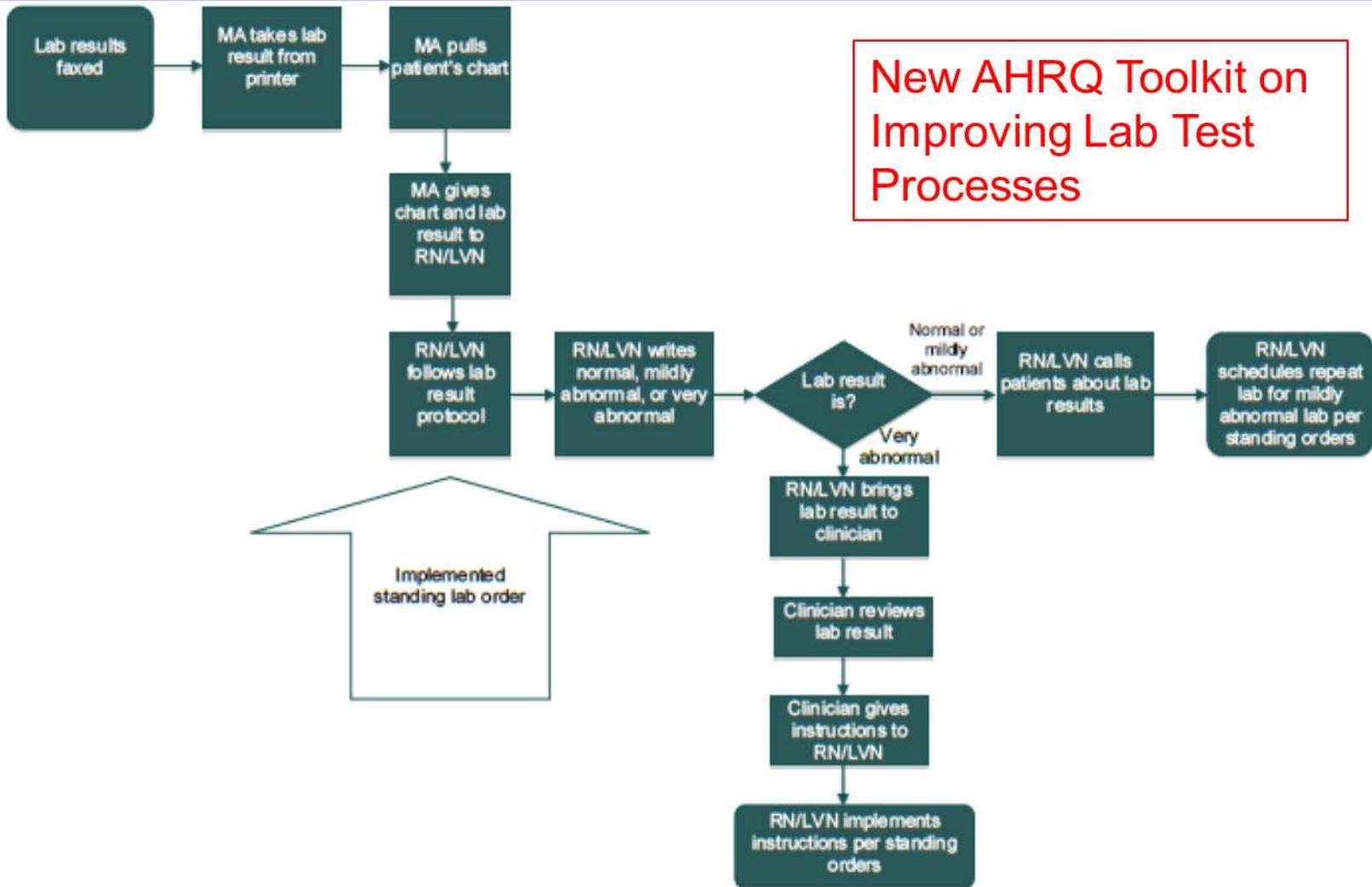
■ Identify important activities to map

■ Redesign reflection questions to:

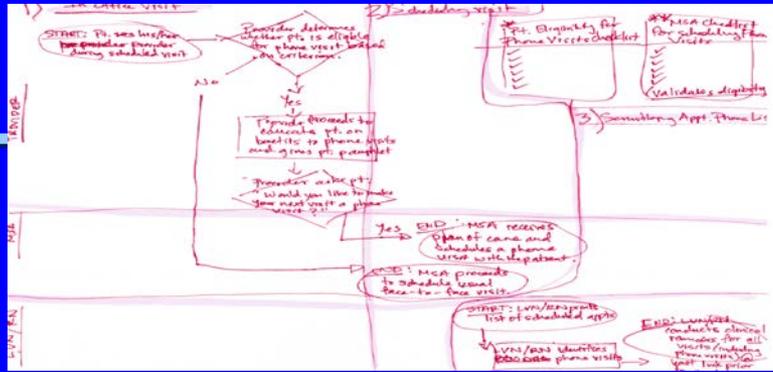
- Distinguish perceived process v. reality
- Identify ideal process

Workflow Map

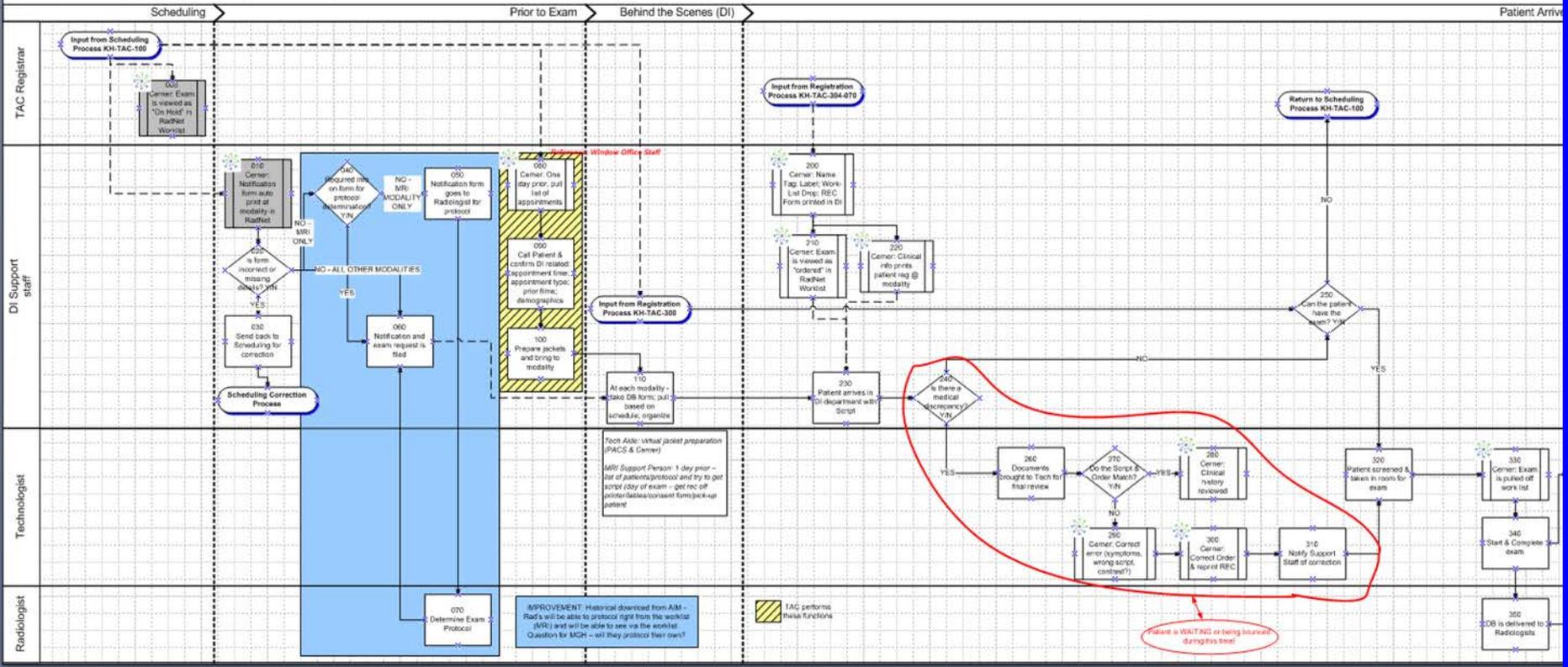
New AHRQ Toolkit on Improving Lab Test Processes



- Veteran Affairs PFs (N=7)
- In-person
 - Reviewed Handbook w/ PF
 - Heavy emphasis on experiential learning
 - Mapped common activity (cell phone call)
 - Taught key concepts of mapping for redesign
 - Observation over memory
 - Map what is, not what should be
 - Mapped complex process
 - Taught Swim lane mapping



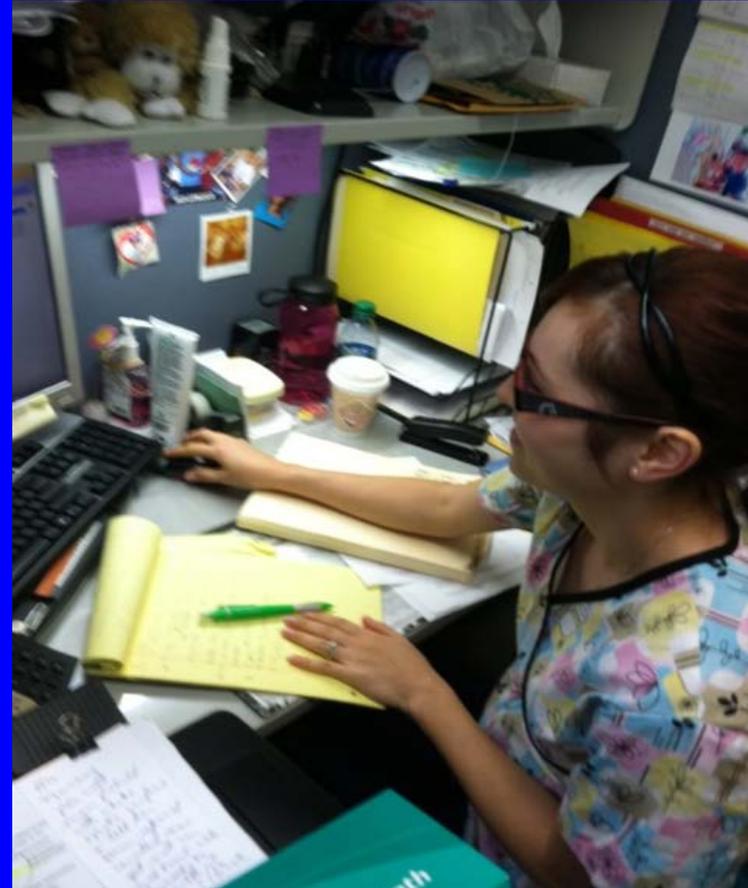
Hospital: KH-DI-102 – Out-Patient DI Patient Process
 Current (as of January 19, 2007); excluding ED; excluding walk-ins



How LA Net Used It



- Taught EHR “click” Mapping
- PFs took training module and used to train teamlets (capacity building)





Part 3: In the Practice

- 11: Introducing a Practice to Facilitation
- 12: Assess Practice Readiness for Change
- 13: Conducting a Kickoff Meeting
- 14: Creating QI Teams and QI Plans
- 15: Documenting Your Work with Practices



Module 13: Conducting a Kickoff Meeting

- Preparation
- Goals
- Logistics
- Agenda
- Practice: mock kick-off meeting



Training LA Net PFs to Conduct Kickoffs



- Reviewed module content
- Modeled kick-off session w/ practice team (in vivo)
 - Orienting to what PFs can and cannot do
 - Creating MOU or agreement outlining expectations
 - Initial goal setting for PF work
 - Practice priorities
 - Funder priorities
 - Mapping the two together





Part 4 : Implementing the Care Model and PCMH

- 16: Introduction to Care Model/PCMH
- 17: Electronic Health Records and Meaningful Use
- 18: Using the AHRQ Care Model Toolkit with Practices
- 19: Implementing Care Teams
- 20: Facilitating Panel Management
- 21: Improving Self-Management Support



Module 20: Facilitating Panel Management

- Size
- Assignment
- Policies & Procedures
- Monitoring
- Empanelment Exercise



LA Net Panel Management Training



- Train PF in exemplar practice (vision)
 - “10 case examples
- In vivo, scripted training for clinician staffs on empanelment, panel management process
 - Tom Bodenheimer/UCSF
- PFs role play in training(MA, MD, RN, PF, Observer)
 - Assign “patients” to panels
 - Create simple “registry”
 - Create point of care report, outreach report



LA Net Panel Management Training



- PFs train practices using same materials
 - Exemplars – create the vision
 - Skills – “how to”
- Leave behind module for practice for:
 - new staff orientation
 - staff cross-training

The Practice Facilitation Handbook

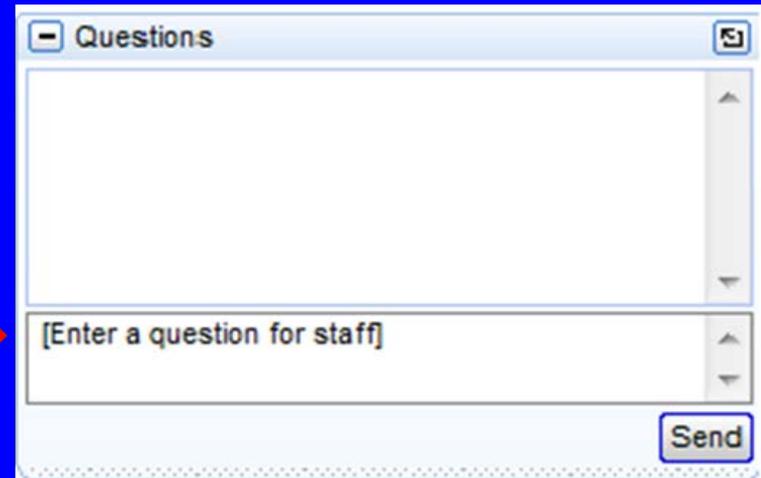
Training Modules for New Facilitators
and Their Trainers



<http://www.ahrq.gov/professionals/prevention-chronic-care/improve/system/pfhandbook/index.html#>

Q & A

- To submit a question, type your question into the “Questions” section of your GoToWebinar control panel.
- Select “Send” to submit your question to the moderator.
- Questions will be read aloud by the moderator.



Questions

[Enter a question for staff]

Send

The screenshot shows a window titled "Questions" with a large empty text area for input. Below the input area is a smaller text field containing the placeholder text "[Enter a question for staff]". A "Send" button is located at the bottom right of the window.



More from AHRQ on Practice Facilitation

- AHRQ's PCMH website: <http://pcmh.ahrq.gov>
 - Practice Facilitation Case Studies
 - A How-To Guide on Developing and Running a Practice Facilitation Program
- AHRQ's PF listserv: email PracticeFacilitation@mathematica-mpr.com & include "subscribe" in the subject line
- Integrating Chronic Care and Business Strategies in the Safety Net Toolkit
<http://www.ahrq.gov/professionals/systems/primary-care/businessstrategies/index.html>



Obtaining CME Credit

This Live activity, AHRQ's Practice Facilitation Handbook: A Resource for New Facilitators and Their Trainers, with a beginning date of 11/15/2013, has been reviewed and is acceptable for up to **1.25 Elective credit(s)** by the American Academy of Family Physicians. Physicians should claim only the credit commensurate with the extent of their participation in the activity.

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Upcoming PBRN Webinars

Why should PBRNs and their members pay attention to theories underlying behavioral change?

December 11, 2013, 1:00pm – 2:30pm ET

Presenter: France Légaré, MD, PhD, CCFP, FCFP, Department of Family Medicine, Laval University

Visit <http://pbrn.ahrq.gov/events> for more information on this and other upcoming PBRN events

What other webinar topics would you be interested in?

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