Practice Facilitation as a Means of Redesigning and Strengthening Primary Care

February 2, 2012

Michael Parchman, AHRQ
Lyndee Knox, LA Net
Erin Fries Taylor, Mathematica Policy Research
ATTENDEES: SUBMITTING A QUESTION TO Q&A

• In the Q&A panel, please click on the dropdown menu arrow
• A dropdown list of the panelists and an All Panelists selection will appear

• Select “All Panelists”
• Then type in your question in the field below the dropdown menu.
• Hit “Send.”
• The question will then be sent to all panelists.

Type in question

Hit “Send”
Acknowledgments

- This work is supported by the Agency for Healthcare Research and Quality (Contract No. HHSA290200900019I).
- Project team included:
  - AHRQ – Michael Parchman, Janice Genevro, David Meyers
  - LA Net – Lyndee Knox
The Context for Practice Facilitation
(Michael Parchman)
What are Practice Facilitators?

“Practice facilitators are specially trained individuals who work with primary care practices to make meaningful changes designed to improve patients’ outcomes.

[They] help physicians and improvement teams develop the skills they need to adapt clinical evidence to the specific circumstance of their practice environment.

--DeWalt, Powell, Mainwaring, et al. 2010
Advancing Excellence in Health Care

Zoe-Anne Fitzhugh, RN, MS, CCRN, CHES
June Levine, RN
Aminah Ofumbi, MSW
Vanessa Nguyen, MPH
Diana Traje, MPH
Christine Edwards, PhD
What do facilitators do?

- Assess practice (admin, finance, clinical, HR, etc.)
- Train QI teams
- Facilitate meetings
- Manage improvement projects
- Executive coaching
- “Curate” resources for practice
- Post-implementation HIT optimization
  - Attain meaningful use
  - Get data to door for QI
  - Set-up registries
  - IT support for panel management
Help practices implement new processes (PCMH, Care Model, other):

- Implement/optimize care teams
- Attain meaningful use
- Train panel managers/implement panel management
- Empanel
- Improve self-management support
- Implement practice guidelines
- Identify & learn from exemplars
- Form learning communities
- Spread good ideas
Who do they facilitate? One model for allocating a scarce resource
Evidence Base for Practice Facilitation

- 2012 Meta-analysis of research on PF
  - Facilitated practices are **3 times more likely to adopt evidence-based guidelines** than non-facilitated practices


PF Cost Analysis

- Cost-consequence analysis of PF in Canadian context
  - ROI on intervention: 40%
  - Savings: $3600/MD, $63,000/PF

Is Practice Facilitation THE answer?

“Necessary but not sufficient”

PF is ONE resource that complements a range of other improvement resources:
- academic detailing
- benchmarking
- learning collaboratives
- payment reform

But PF is also UNIQUE among these resources
- helps marshal and coordinate across resources
- supports SCALE UP AND SPREAD
- pay-off it not just the immediate – it’s the long-term presence & availability of the facilitator
Proposed Effects of QI Interventions on Change Elements

Priority
- Performance Feedback

Change Capacity
- Academic Detailing
- Practice Facilitation

Change Process
- Local Learning Collaboratives

Content
- Health IT Support

Source: Jim Mold
Advancing Excellence in Health Care Requires DEEPLY SKILLED workforce

“Facilitative” interpersonal skills

Health IT optimization

Data & use to drive improvement

QI & change management methods

PLUS: Expertise in specific content of intervention (PCMH, etc.)
Facilitation ALSO Requires

- Intervention with CLEARLY defined KEY-DRIVER model to guide PF work with practices and keep them focused and "out of the poppies"
  - Choice within structure

- ROBUST TRAINING and SUPERVISION for facilitators

- SYSTEMS for MONITORING PROGRESS & PERFORMANCE: “Practice Registries” for facilitators, feedback on PF and practice performance

- LONG-TERM COMMITMENT: the “magic is in the permanence not the immediate." PCMH is just the beginning....
What types of organizations are setting up PF programs?
Practice-Based Research Networks (PBRNs)

Examples: Oklahoma (OKPRN), New York (UNYNET), Los Angeles (LA Net), Oregon (ORPRN), etc.

What?
Support QI
Evidence translation
Practice based research

Where?
Rural to Urban
Small to Large
Safety net to affluent
Local to State-wide

Jim Mold will talk about OKPRN’s program
Area Health Education Center (AHECs)

Example: North Carolina

QI Coaches

**What?**
Support QI, PCMH transformation
Health IT implementation

**Where?**
Statewide

*Ann Lefebvre will talk today*
Quality Improvement Organization (QIOs)

Example: Qualis Health et al. (Safety Net Medical Home Initiative)
QI coaches + collaboratives

**What?**
- PCMH Transformation
- Empanelment
- Team-based care
- Patient-centered interactions
- Enhanced access
- Care coordination
- Evidence-based care

**Where?**
- 5 states
Member Associations

Example: Washington Academy of Family Physicians

QI coaches

What?
Medical Home Transformation
Diabetes care improvement

Where?
Members statewide

Kimbra Wells Metz will talk today
Examples: Oklahoma Health Authority, Vermont, Maine, Massachusetts, New York City

**PF** plus collaboratives, payment reform, etc.

**What?**
- PCMH transformation
- Implement care coordination
- Improve quality in practices serving high proportion of complex/high-risk patients

**Where?**
- Statewide
- Citywide
Two stories ...
FQHC, 2 sites, 50,000 visits/year

PF there for 10 months

QI infrastructure:

- **Then:** CMO with excel sheet

- **Now:** Performance reporting by provider, QI team with diverse membership, plan, process and data
Chronic Kidney Disease (CKD) Guideline Implementation

6 FQHCs, 1 CHC, 1 private practice

Registry:
  Then: None
  Now: CKD registry
  Soon: Trained population manager

Lab data/decision support:
  Then: eGFRs could not be included in registry (lab issue); could not generate trend lines
  Now: Vendor change system to contain eGFR data and produce trend line
Once upon a time…

Developing and Running a Primary Care Practice Facilitation Program: A How-to Guide
How the Manual Came Together

- How it was developed
  - Invited 30 experts
  - Facilitated calls to identify critical topic areas
  - Divided into working group based on experience and interest
  - Gathered tools and resources

- Tension to tell the story about “how to facilitate” rather than “how to start and run a program”
Thanks to the PF Expert Working Group

- Manual reflects collective knowledge and experience of more than 30 experts in the field

Carolyn Allshouse  Elizabeth Foley
Cheryl Aspy  Brenda Fraser
Thomas Bodenheimer  Allyson Gottsman
Bonni Brownlee  Joanne Gutowsky
Caroline Carter  William Hogg
Katie Coleman  Craig Jones
Allen Dietrich  Ann Lefebvre
Darren DeWalt  Clare Liddy
Perry Dickinson  Jeanne McAllister
PF Expert Working Group - continued

Marly McMillen
Gail McNutt
James Mold
Regina Neal
Amanda Parsons
Joan Pernice

Diane Powers
Mary Ruhe
Constance Sixta
Jenney Samuelson
Lisa Watkins
PF Manual’s Intended Audiences

- For future and existing directors of PF programs
- Target audience is any organization interested in developing a facilitation workforce to improve or transform primary care:
  - State or local departments of health
  - Quality Improvement Organizations (QIOs)
  - Area Health Education Centers (AHECs)
  - HITECH Regional Extension Centers (RECs)
  - Practice-based research networks (PBRNs)
  - Primary care associations (PCAs)
  - Accountable care organizations (ACOs)
  - Chartered value exchanges (CVEs)
  - Large health care systems
## Chapters and Key Topics

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<td>• PF in the current policy environment</td>
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<td>2. Creating an administrative home</td>
<td>• Selecting an organizational home</td>
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<td>3. Funding your PF program</td>
<td>• Creating a business plan</td>
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<td>• Identifying potential funding sources</td>
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<td>• Marketing your program to funders</td>
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<td>4. Developing your PF approach</td>
<td>• Creating a key driver model</td>
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<td>• Identifying your PF team</td>
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<td>• Stages and key activities</td>
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<td>• Defining facilitator roles and activities</td>
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<td>6. Training your practice facilitators</td>
<td>• Assessing and leveraging existing training resources</td>
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<td>• Creating a curriculum</td>
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<td>• Selecting your educational approach and strategies</td>
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<td>7. Supervising and supporting your facilitators</td>
<td>• Selecting a supervisor for your facilitators</td>
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<td>• Deciding on individual versus group supervision</td>
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<td>• Ways to create a learning community</td>
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<td>8. Evaluating the quality and outcomes of your PF program</td>
<td>• Creating an internal QI program</td>
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<td>• Identifying metrics for your QI process</td>
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<td>• Evaluating the outcomes</td>
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How do you view the role of practice facilitation in the overall quality improvement context?

James Mold, University of Oklahoma and Director, Oklahoma Physicians Resource/Research Network

Ann Lefebvre, University of North Carolina and Associate Director of NC AHEC Program
Effective Implementation of Innovations in Primary Care

- Performance Feedback
- Academic Detailing
- Facilitation
- IT Support
- Local Learning Collaboratives
What do you wish you’d known when you were developing your PF program?

James Mold, University of Oklahoma and Director, Oklahoma Physicians Resource/Research Network

Ann Lefebvre, University of North Carolina and Associate Director of NC AHEC Program
Practice-Based Services Provided by NC AHEC

Paper Charts
- Learn how to:
  - Assess the needs of your practice in an EHR system.
  - Redesign your paper practice to ready for an EHR.

Electronic Health Records
- Learn how to:
  - Select a certified EHR that meets your needs
  - Implement an EHR for optimal use in your practice

Meaningful use of HIT
- Learn how to:
  - Use your EHR to meet the federal requirements for the HITECH Act
  - Meaningful Use Incentive Payments from Medicare or Medicaid

Improved Clinical Outcomes
- Learn how to:
  - Produce population-based reporting to test the efficacy of your care
  - Use proven methods and techniques to improve the outcomes of your patients

PCMH
- Learn how to:
  - Meet the requirements of the NCQA Recognition program for PCMH
  - Approach the PCMH application process with improvement techniques
Future Practice Needs – NC AHEC

Year 2012  Year 2013  Year 2014  Year 2015

- MU Stage 2
- PCMH Initiatives
- Payer Initiatives
- Gov. Pymt Programs
- ACOs
- Payer Profiling
- ICD 10

System Implementation  System Improvements
Advancing Excellence in Health Care

Perspectives on Using the Manual

WAFP Practice Transformation Coaching

Kimbra Wells Metz, Director of Practice Transformation, Washington Academy of Family Physicians
WAFP History

• Supporter of WA State Collaboratives since 1999
• Piloted the AAFP Practice Enhancement Program, 2005
• Recipient of American Board of Medical Specialties (RWJF) grant Improving Performance In Practice (IPIP), 2008
# Practice Transformation Coaching – WAFP’s Service Offerings

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<tr>
<th>Triage: Assessment</th>
<th>Evaluate Your Current Preparedness for PCMH or Other Key Performance Measures</th>
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<tbody>
<tr>
<td>□ PCMH Medical Home Index</td>
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<tr>
<td>□ Use your quality &amp; key performance measures</td>
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<tr>
<td>□ Other designated assessment tool</td>
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<tr>
<th>Transformation Support</th>
<th>Provide Education and Resources</th>
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<tr>
<td>□ In-person and virtual learning sessions</td>
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<tr>
<td>□ Coach supported and self study options</td>
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<tr>
<td>□ Train the trainer</td>
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<tr>
<th>Transformation Coaching</th>
<th>Customized Practice Transformation Coaching</th>
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<td>Work with your team to:</td>
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<tr>
<td>□ Identify solutions for QI opportunities.</td>
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<td>□ Re-design work flow processes</td>
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<tr>
<td>□ Test rapid process improvement solutions</td>
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<tr>
<td>□ Apply education and resources</td>
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<th>Transformation Maintenance</th>
<th>Sustain and Spread the Gains</th>
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<tr>
<td>□ Tools and resources</td>
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<td>□ Maintenance coaching</td>
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<tr>
<th>Learning Network</th>
<th>Ongoing Learning and Teaching Opportunities</th>
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<tbody>
<tr>
<td>□ Stay connected and share best practices</td>
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<tr>
<td>□ Mentor a clinic/organization</td>
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<tr>
<td>□ Learn from other organizations</td>
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Q&A

Please submit questions via the question panel on the right.
Next Steps

- Please respond to the survey *immediately* following this webinar
- Visit [http://www.pcmh.ahrq.gov](http://www.pcmh.ahrq.gov)
  - Note the Practice Facilitation webpage
- Join an upcoming active learning community to learn more about PF
  - Series of webinars
  - Inventory of resources/tools for sharing
  - Development of briefs, FAQs, etc.
- Sign up for the PF listserv in the near future!