

# Primary Care Practice Facilitation Curriculum

Module 17: Introducing a Practice to Facilitation



Agency for Healthcare Research and Quality

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## **Module 17. Introducing a Practice to Facilitation**

### **Prepared for:**

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**Contract No.** HHS A2902009000191-Task Order No.6

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### **Suggested Citation**

Knox L, Brach C. Primary Care Practice Facilitation Curriculum (Module 17). AHRQ Publication No. 15-0060-EF, Rockville, MD: Agency for Healthcare Research and Quality; September 2015.

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# Module 17. Introducing a Practice to Facilitation

## Instructor's Guide

Practice facilitator (PF) competencies addressed in this module:

- Knowledge of practice facilitation
- Cultural competency for communicating effectively at all levels
- Professional competency in transparency

### Time

- Pre-session preparation for learners: 75 minutes
- Session: 60 minutes

### Objectives

After completing this module, learners will be able to:

1. Give a succinct description or “elevator speech” that explains practice facilitation.
2. Tell two stories that illustrate the activities of facilitators in practices.

### Exercises and Activities To Complete Before and During the Session

**Pre-session preparation.** Ask the learners to review information in items 1 and 3 and complete the activity in item 2 (75 minutes)

1. The content of the module.
2. Have learners draft two short stories illustrating facilitator activities in practices that are appropriate for use in explaining facilitation to practices and be prepared to share with others during the session.
3. Video on practice enhancement assistants (practice facilitators) at <https://www.youtube.com/watch?v=k5hDkEYm2XI>

**During the session.** Presentation (30 minutes)

1. Present key concepts from the module.
2. Ask learners to develop a two- to four-minute “elevator speech” that describes what practice facilitation is for use with their practices. In pairs, have learners role-play their elevator speeches and stories with each other.

**Discussion.** Ask questions and explore answers with learners (30 minutes)

1. What did you learn from this exercise?
2. How will you use this information with your practices?

**After the session.** Review the resources at the end of the module for additional information on practice facilitation (optional)



## Module 17.

A very important early step in starting a facilitation intervention is teaching your practice how to work effectively with you. Practices sometimes comment, “I wish I had understood sooner how to use the practice facilitator.” The practice facilitator can help with many things, but often it is only toward the end of facilitation that practices really understand what a practice facilitator does or is. As best as possible, you should try to make sure that the practice has a good understanding of the purpose and functions of a practice facilitator.

“I wish I had understood sooner how to use the practice facilitator.”

—Community Health  
Center in Southern  
California

### Understand Facilitation Versus Consultation

Most practices are used to working with consultants who are brought in to solve a specific problem or provide expertise in a very focused area. Practice facilitators are different from consultants. You provide more generalized support to a practice, aimed at building the practice’s overall capacity for change. This is not to say that you are not also providing specialized support to introduce new processes of care associated with a specific project. But the range of support is much broader than a typical consultant.

For example, you might help a practice develop workflows to support team-based care or help optimize health information systems after they have been implemented to support population management. Or you might help a practice find another practice that is using group visits and set up a site visit with them or train the quality improvement (QI) team in workflow analysis and performance reporting.

Unlike consultants, practice facilitators expect to form a long-term relationship with a practice and support ongoing QI work at the practice. Also unlike consultants, practice facilitators focus on introducing a culture of continuous QI and learning in the practice. They also help build the internal capacity of the staff to develop positive attitudes toward ongoing and sustainable changes.

### Teach the Practice How To Work With You

The practice is unlikely to know how to use or work with you unless you teach them. Several strategies are effective for helping practices understand how to work with you:

- Ask about their understanding of what facilitators do and prior experience with facilitators.
- Provide fact sheets on your practice facilitation services.
- Tell stories about the work you’ve done with other practices.
- Describe the skill sets of other facilitators on your team who could be brought in to help.
- Have an academic detailer talk about how to work effectively with a practice facilitator.

## Keep Leadership Aware of Your Work

Practice leadership can be influential in making sure the practice is getting the most of out of facilitation, but to wield their influence they have to remain engaged. Clinical and administrative directors are extremely busy. You may think they remember what you are doing and are aware of any progress that is being made, but often they will have forgotten. It is essential that you check in with leadership regularly and often.

You cannot rely on members of the QI team to keep leadership informed. This is not the time to be shy. These checks-ins can be in person, by phone, or electronic. A combination of in-person and email updates, such as a weekly email and a monthly in-person meeting, is effective. Emails should be short and to the point and draw attention to any items that require action. In-person meetings are essential to allow practice leadership to respond to the improvement and request changes.

Keep people at multiple levels of the practice informed and engaged.

A short progress report each month in the form of a performance data display can be a useful way to keep key players in the loop. Another good way to keep people at multiple levels of the practice informed and engaged is through project management software. This software is available through subscription and can be used to update the practice QI team, practice leadership, and facilitation team. The software can generate many kinds of output such as reports and notifications on pending and completed tasks.

A critical part of any change or transformation is the “narrative” that people develop around the project. This narrative—that is, the stories people tell about the work that is going on—is what they will eventually use to judge the success of the effort. Your communications with the practice should help develop a “story” about the improvement work at the practice and your role in it, continually reminding the practice about the ways you can help them move forward.

Note: this module is based on Module 11 of the Practice Facilitation Handbook. Available at <http://www.ahrq.gov/professionals/prevention-chronic-care/improve/system/pfhandbook/>

## Resources

Geonnotti K, Taylor EF, Peikes D, Schottenfeld L, Burak H, McNellis R, Genevro J. Engaging Primary Care Practices in Quality Improvement: Strategies for Practice Facilitators. AHRQ Publication No. 15-0015-EF. Rockville, MD: Agency for Healthcare Research and Quality. March 2015. Available at <http://www.pcmh.ahrq.gov/page/engaging-primary-care-practices-quality-improvement-strategies-practice-facilitators>

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