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# Hiring and Training Practice Facilitators

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**April 11, 2012**

**David Meyers, AHRQ**

**Lyndee Knox, LA Net**

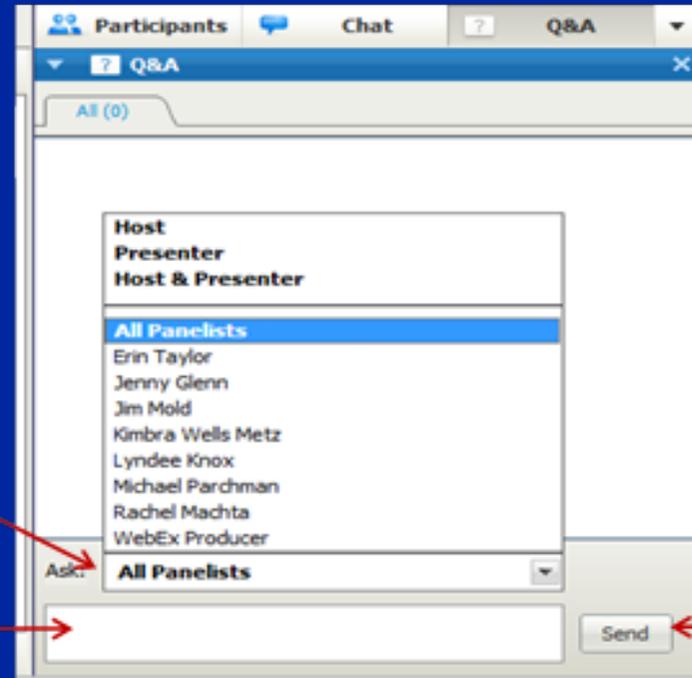
**Erin Fries Taylor, Mathematica Policy Research**

## 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”

# Introduction

**David Meyers, AHRQ**

For more information please visit:

[www.pcmh.ahrq.gov](http://www.pcmh.ahrq.gov)

# Acknowledgments

- **This work is supported by the Agency for Healthcare Research and Quality (Contract No. HHS A290200900019I).**
- **Project team included:**
  - **AHRQ – David Meyers, Janice Genevro**
  - **LA Net – Lyndee Knox, Rose Vazquez**
  - **Mathematica – Erin Taylor, Kristin Geonnotti, Rachel Machta, Eugene Rich, Jung Kim, Jessica Nysenbaum, Debbie Peikes**

# Some Background on Facilitation and the How-To Manual

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**Erin Taylor, Mathematica Policy Research**

## What do facilitators do?

- Assess practice (admin, finance, clinical, etc.)
- Train practice staff in quality improvement methods and concepts
- Support clinicians and staff in implementing new approaches to care (for example, team-based care, open access)
- Facilitate meetings
- “Curate” resources for practice
- Help practices optimize health IT tools (for example, meaningful use of electronic health records)
- Form learning communities



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# Developing and Running a Primary Care Practice Facilitation Program: A How-to Guide



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# Thanks to the PF Expert Working Group

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

**Carolyn Allshouse**

**Cheryl Aspy**

**Thomas Bodenheimer**

**Bonni Brownlee**

**Caroline Carter**

**Katie Coleman**

**Allen Dietrich**

**Darren DeWalt**

**Perry Dickinson**

**Elizabeth Foley**

**Brenda Fraser**

**Allyson Gottsman**

**Joanne Gutowsky**

**William Hogg**

**Craig Jones**

**Ann Lefebvre**

**Clare Liddy**

**Jeanne McAllister**

**Marly McMillen**

**Gail McNutt**

**James Mold**

**Regina Neal**

**Amanda Parsons**

**Joan Pernice**

**Diane Powers**

**Mary Ruhe**

**Constance Sixta**

**Jenney Samuelson**

**Lisa Watkins**

# Chapters and Key Topics

Chapter	Selected Key Topics
1. Background and existing evidence for PF	<ul style="list-style-type: none"> <li>• History of PF</li> <li>• Evidence for PF's effectiveness</li> <li>• PF in the current policy environment</li> </ul>
2. Creating an administrative home	<ul style="list-style-type: none"> <li>• Selecting an organizational home</li> <li>• Defining your mission and goals</li> <li>• Staffing</li> </ul>
3. Funding your PF program	<ul style="list-style-type: none"> <li>• Creating a business plan</li> <li>• Identifying potential funding sources</li> <li>• Marketing your program to funders</li> </ul>
4. Developing your PF approach	<ul style="list-style-type: none"> <li>• Creating a key driver model</li> <li>• Identifying your PF team</li> <li>• Stages and key activities</li> <li>• Defining facilitator roles and activities</li> </ul>

# Chapters and Key Topics - *continued*

Chapter	Selected Key Topics
5. Hiring your practice facilitators 	<ul style="list-style-type: none"> <li>• Core competencies needed</li> <li>• Deciding who to hire</li> <li>• Staffing models</li> </ul>
6. Training your practice facilitators 	<ul style="list-style-type: none"> <li>• Assessing and leveraging existing training resources</li> <li>• Creating a curriculum</li> <li>• Selecting your educational approach and strategies</li> </ul>
7. Supervising and supporting your facilitators	<ul style="list-style-type: none"> <li>• Selecting a supervisor for your facilitators</li> <li>• Deciding on individual versus group supervision</li> <li>• Ways to create a learning community</li> </ul>
8. Evaluating the quality and outcomes of your PF program	<ul style="list-style-type: none"> <li>• Creating an internal QI program</li> <li>• Identifying metrics for your QI process</li> <li>• Evaluating the outcomes</li> </ul>



Lyndee Knox, PhD  
Chief Executive Officer  
L.A. Net, Community Health Resource Network

# Core Competencies: Requires Deeply Skilled Workforce



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

# What experts say on who to hire:

- **Skilled facilitators can come from a variety of backgrounds:**
  - **Clinical background can be useful but is not essential**
    - MD
    - RN
    - Social Work
    - Psychology
  - **Public Health (MPH)**
  - **Administration (MHA)**
  - **Business (MBA)**
  - **Lay persons with passion**
    - Parents of pediatric patients
    - Community advocates
    - Community leaders

## Experts' thoughts on who to hire:

- **Characteristics that make a good facilitator include:**
  - **Able to work autonomously**
  - **Satisfied with long-term goals, since pay off and progress is usually not immediate**
  - **Resilient and flexible**
  - **Empowerment orientation (interested in building capacity versus being “needed”)**
  - **Good teachers**
  - **Excellent data skills**
  - **Like working with people and dealing with conflicts - strong facilitative interpersonal skills**

## Key elements of training programs

- **Based on program's key-driver model/change goals**
- **Tailored to the learning needs of each facilitator**
  - **Backgrounds will vary, so design training to meet each facilitator's unique learning needs/gaps/goals**
- **Be long-term & continuous – one shot training won't get the job done**
- **Emphasize experiential learning**
- **Emphasize practice empowerment/capacity building**
- **Budget for professional development & conference attendance**
- **Provide regular opportunities for peer-to-peer support among facilitators for idea sharing and problem solving**

# Steps to designing program

- **Leverage local training resources. Do an environmental scan of training resources in your own organization and area**
  - ◆ Research training from a university
  - ◆ Quality improvement (QI) training from a local program
  - ◆ Experts on your staff or in the area
  - ◆ Practices that have been facilitated or transformed
  
- **Curriculum content should map directly to your key-driver model and intervention methods**

## Some creative training methods used by experts

- Pre-assessment and tailored professional development plan for each facilitator
- Role playing using a “standardized practice”
- Case-based learning for facilitators
- Analysis of audio taped interactions with real practices
- Mini-apprenticeship (following an experienced facilitator for 2 weeks)
- Co-training facilitators and practices

# Selecting a Trainer

- **Should have prior experience as a facilitator**
- **Empowerment orientation and approach**
- **Co-teach with one of your experienced facilitators**

# Training Sources

- Internal training with program staff as trainers
- Guest speakers series
- Send away programs
- Virtual training program
- Co-training of facilitators and practices

# Remember to train the entire team

## Facilitation is a “team sport”

- **Academic detailer/MD**
- **Content experts for team**
- **Support staff for facilitation team/program**
  - Program mission
  - Role on team
  - Intervention goals
  - Role of lead facilitator

# Perspectives From the Practice Facilitator



Melinda Davis, PhD, CCRP

**Front-line practice facilitator!**

Research Scientist, Oregon Rural Practice-based Research Network  
Research Assistant Professor, Department of Family Medicine  
Oregon Health & Science University

# Perspectives from the Field



Allyson Gottsman  
Executive Vice President  
HealthTeamWorks

Focus: Internal training program

## Perspectives from the Field



Jenney Samuelson, MS

Assistant Director, Blueprint for Health  
Department of Vermont Health Access

Focus: Co-training of facilitators and practices

# Orientation

- Orientation to the Blueprint
- Clinical Microsystems (change model)
- Self-management support in primary care
- Patient Centered Medical Home/NCQA

# Lessons Learned

You may need to plan to train new facilitators individually.  
So consider:

- Content
  - We have identified key places that facilitators can go for group training; for example, Dartmouth Clinical Microsystems, NCQA, Stanford Self-management
  - Need to budget for training up front
- Mentoring

# Perspectives on Mentoring

Mentoring needs to be formally defined.

- In-practice work
  - Shadow mentor for a month
  - Shadow other facilitators for a day
  - Mentor goes with mentee for a similar period of time (identify when to sever cord)
  - Call mentee weekly by phone for up to 6 months
  - Always available by phone thereafter
- Integrating mentee into facilitator meetings
  - Check-in before and after meetings
  - Sit next to mentee in meetings

# Co-Training Model

- Practices, community health teams, and facilitators trained together on a concept
- Facilitators learn the content along side of the practice
- Facilitators' role is to assist practice in using change methodology to take what they learn and integrate into their workflow (PDSA)

# Collaboratives

- Identify premiere programs nationally
- Send 1 to 2 facilitators to become 'experts'
- Bring it back to Vermont and lead a collaborative (co-training opportunity)

# Factor in On-going Training

- Budget for on-going training
- Invest in learning health system activities (opportunities to learn from each other)
- Allow for informal networking
- Challenges
  - Just in time training (testing Basecamp as a solution)

# Hire the Right People

- Identify the core skills
- Intensive and unique interview style
- Balance of:
  - ‘Sparkle’
  - Knowledge on managing change
  - Flexibility
  - Quality data skills
- Turn people down if not the right person

# Lessons from the Safety Net Medical Home Initiative



Kathryn E. Phillips, MPH  
Director, Safety Net Medical Home Initiative  
Qualis Health

Focus: Virtual training

# Safety Net Medical Home Initiative

- National PCMH demonstration (5 regions, 65 primary care safety net sites)
- Transformation support model:
  - Facilitator training and support (“train-the-trainer” model to enhance regional capacity)
  - Direct training for sites
  - Organize and support “learning communities” to foster peer learning and sharing (facilitators and sites)
  - Resources and tools, including access to external experts
- Early step was to develop a “change package” that defines the attributes of a PCMH and the system changes needed to get there  content curriculum for facilitators and sites

# What Our Practice Facilitators Do

- Regionally-based; 13-18 facilitators for 65 sites (most part-time)
- Employed by regional organizations: PCA, etc
- Provide support for PCMH implementation at the site-level:
  - Teach PCMH content
  - Review data and develop work plans
  - Project management and reporting; meeting facilitation
  - Identify and apply resources and tools
  - Plan and conduct regional learning sessions/collaboratives
  - Provide support for change management
- Support PCMH recognition (NCQA or state-based)
- Mix of in-person and virtual methods (email, phone, webinar, site-visits)

# Training Facilitators: How We Support Their Work

- Developed a curriculum/framework: 8 Change Concepts for PCMH
- Transformation (empanelment, enhanced access, etc.)
  - Comprehensive library of resources and tools
  - Web/print-based core curriculum (13 implementation guides) for self-directed/facilitator-enhanced learning
  - Webinars (26) and interactive tools (e.g., patient acuity calculator)
  - Assessment tools for facilitators and sites
- Facilitate forum (“Medical Home Facilitator Community of Practice”) for facilitator idea exchange and support:
  - Monthly conference call: case presentations, challenges and successes
  - Listserv and tool exchange
  - In-person meetings (2-3 a year). Some content and skills training, but mostly peer-to-peer learning

# Training Sites: How We Support Their Work

- Facilitate forums for site-to-site learning and sharing:
  - Support annual in-person regional learning sessions; one national in-person learning session
  - Field trips
  - Virtual networking opportunities (Basecamp)
  - Collect and publish case studies
- Provide direct training for sites in collaboration with facilitators
  - Web/print based core curriculum
  - Monthly webinars (virtual) – sequenced with curricula
  - Office hours (virtual) – ad hoc and responsive to site-specific needs
  - Workshops (in-person group events) – ad hoc and responsive to site-specific needs
  - Site-visits from “Project Team” or experts to address challenges (in-person, site-specific events)

# Virtual Learning: What Works?

## Helpful

- Teaching specific, sequential content
- “How to” content
- Basic Q&A
- Proving access to tools
- Case studies

## Challenging

- Teaching complex or interconnected content
- Networking and fostering collaboration
- Culture change
- Providing motivation
- Team participation

# Lessons Learned/Recommendations for Others

- Facilitators entered project with varying levels of “core skills” (e.g., using data to drive change). Teaching “core” skills/developing coaching confidence is more time intensive (and difficult) than teaching content.
  - Be prepared (and give your program time!) to teach core facilitator skills and content.
- Facilitators need support in order to be successful. Facilitators value peer education and support.
  - Invest in learning and growth opportunities.
  - Support a facilitator “community of practice” to foster peer learning.
  - Recognize that facilitator alone is insufficient to fix some problems (e.g., practice leadership issues, financial issues). Find creative ways to augment facilitator.

# Training Resources for Facilitators

- Facilitator's Guide to Site Visits
- Facilitator's Guide to Rapid Fire Sessions
- Tools and resources available at:
  - <http://www.safetynetmedicalhome.org>

## *Coming soon....*

- National Medical Home Curriculum (January 2013)
- Coaching Tools from the SNMHI (July 2012)
  - PCMH-A coach validation
  - Green-Yellow-Red Assessment
  - Tiering Exercise

# Questions & Answers

**Please submit your questions through the Q&A panel on the right hand side of your screen**

## Thank You & Next Steps

- Please respond to the survey *immediately* following this webinar
- Next Webinar: Designing Your Facilitation Intervention
  - Date: To be announced (expected in May 2012)
- Please join AHRQ's PF listserv by emailing [PCPF-request@LIST.AHRQ.GOV](mailto:PCPF-request@LIST.AHRQ.GOV)
- Visit [www.pcmh.ahrq.gov](http://www.pcmh.ahrq.gov)
  - Note the Practice Facilitation webpage