

# Practice Facilitation



## SKILLS WORKSHOP

Building relationships with your practices



Crystal Eubanks

Senior Manager of  
Practice Transformation

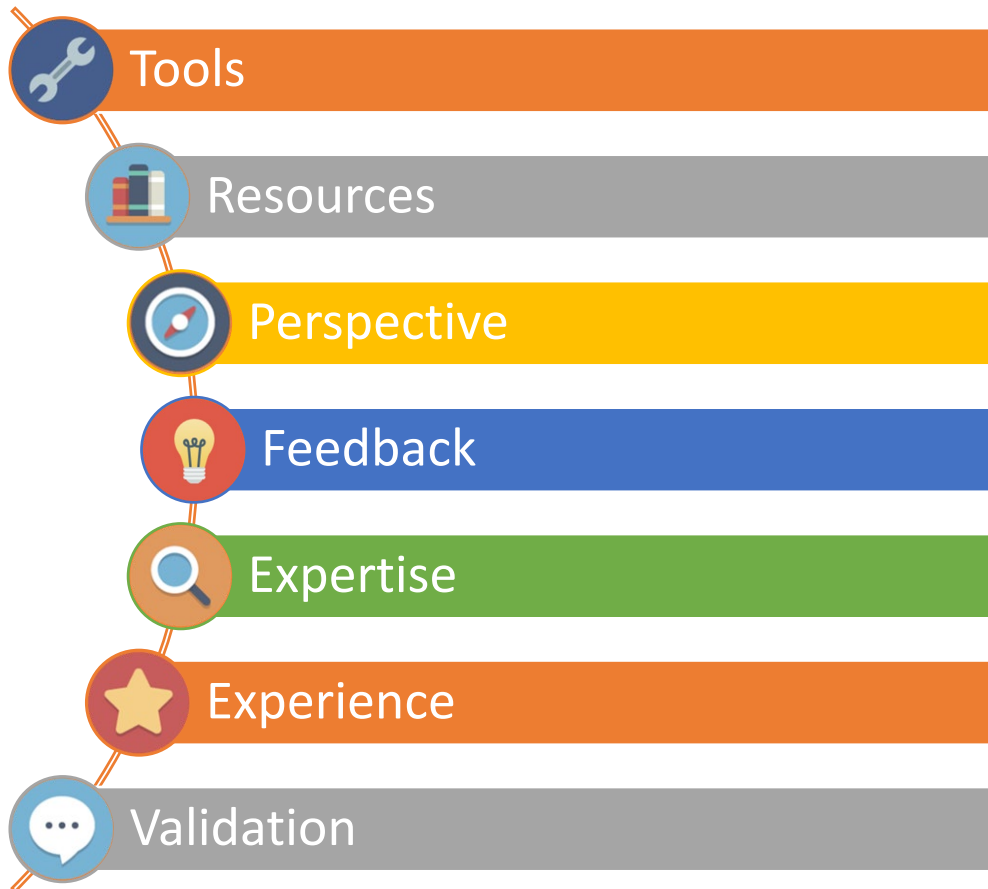




# Today's Agenda

1. Practice Facilitation Technical Assistance Program
2. What does it mean to be a coach?
3. What does a coach do?
4. How do I start working with a practice?

# Utilizing your coach support network



- Ask and offer another coach...
  - how to overcome a similar challenge.
  - perspective on a difficult situation.
  - a tool or resource used successfully.
  - expertise on a particular subject.
  - celebration!



# Launching Virtual Support for Coaches in 2017



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## **SKILLS WORKSHOP**

*1<sup>st</sup> Thursday @ 10am*

Designed around themes

Are designed to learn something

Focus on cognitive understanding

Facilitator shares content

Can be repeated with little or no changes



## **LEARNING LAB**

*Monthly – Day & Time TBD*

Designed around contextual issues

Are designed to test something

Focus on experiential learning

Group of participants drive what is being tested

Designed to accommodate context, knowledge, and experiences of participants

# Connect with coaches on Socialcast

The screenshot shows a web browser window with the URL <https://pbgh-org.socialcast.com/groups/141089-practicefacilitationcoaches>. The page header includes logos for CQC, Integrated Healthcare Association, and CCI, along with a search bar and user profile for Crystal. The main content area features a group profile for "Practice Facilitation Coaches" with a "Member" badge and an "Add Members" button. Below the profile is a post by Crystal Eubanks, titled "Practice Facilitation Coaches", which discusses observation as a tool for gathering information about a practice. The post includes a link to [www.wearecatalysts.org/toolkit/11](http://www.wearecatalysts.org/toolkit/11) and a "Tools :: Catalyst" section with the URL <http://www.wearecatalysts.org>. The post was made on Dec 5, 2016 at 11:20 am from a web browser. On the right side, there are "Group Helpful Links" for "Box - PTI Public" and "PTI Public (Box)", and a notification to "Post to the Practice Facilitation Coaches post stream by email". A left sidebar contains navigation options for "HOME", "PUBLIC SPACES", and "PRIVATE SPACES".

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# Digital Resource Library



Secure | https://pbgh.app.box.com/files/0/f/4974749502/PTI\_Public

Search Files

All Files > ... > AIM 2 - Practice ... > PTI Public > 2

All Files > ... > Present Programs > AIM 2 - Practice Transformation In...

Upload
+ New
...
[Pencil icon]

For any outward facing documents/materials that can be publicly linked

- 1\_PTI Program**  
 Updated today by Juliane Tomlin 297
- 2\_Practice Facilitation Coaching and Program**  
 Updated Jan 17, 2017 by Juliane Tomlin 45
- 3\_Change Package Interventions (includes 10 Building Blocks)**  
 Updated Jan 27, 2017 by Juliane Tomlin 67
- 4\_Additional Resources**  
 Updated Nov 17, 2016 by April Watson 11
- 5\_Onboarding Documents**  
 Updated Jan 4, 2017 by Crystal Eubanks 17

- Case Studies of Practice Facilitation Programs**  
 Updated Nov 21, 2016 by Crystal Eubanks 3
- Coaching Program Management**  
 Updated Nov 21, 2016 by Crystal Eubanks 2
- PTI Roadmap Resources**  
 Updated Jan 17, 2017 by Juliane Tomlin 33
- Resources for Coaches**  
 Created Nov 21, 2016 by Crystal Eubanks 7





## POLL: Which place would you go first for support?

- Ask the Practice Coach group on Socialcast
- E-mail or message another coach
- Search through the Digital Library on Box
- Ask a question during the skills workshop
- Bring a challenge to the virtual Learning Lab for other perspectives

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What does it mean to be a coach?

"Coaches offer a structure, time, and place for practices to solve their own problems."

—Humboldt Del Norte Foundation, a Robert Wood Johnson Aligning Forces for Quality participant

# Coaching Roles



Convener

Facilitator

Agenda setter  
and task  
master

Skill builder

Knowledge  
broker

Sounding  
Board

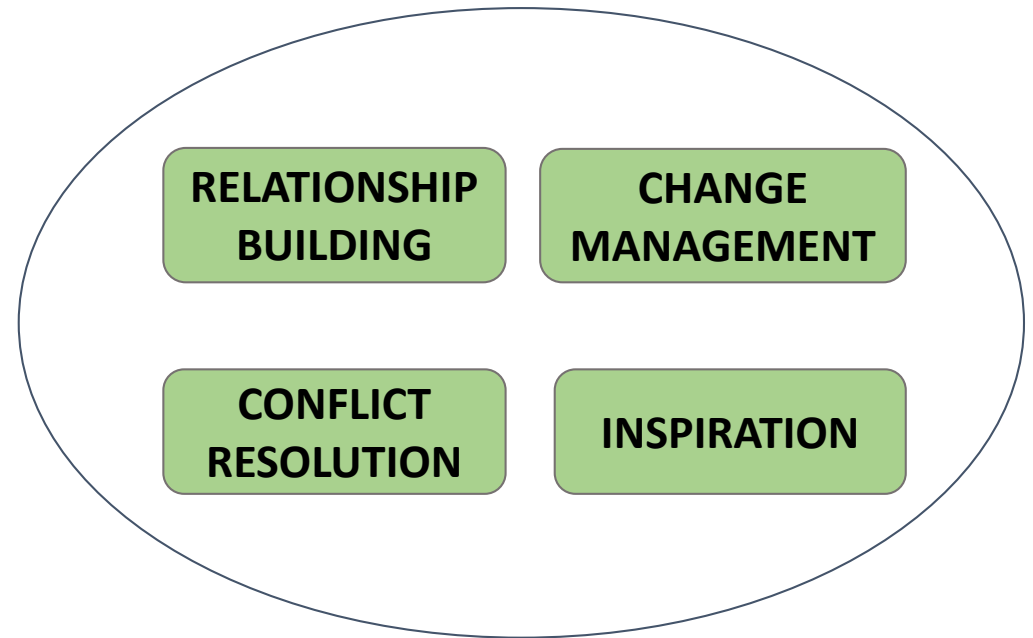
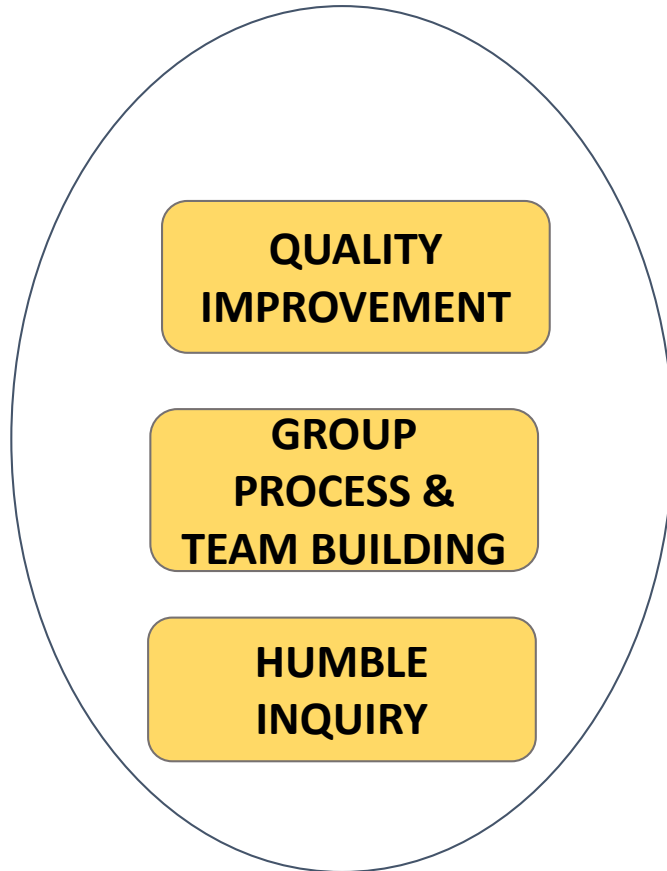
Problem  
Solver

Change Agent

# Coaching Competencies

Learned through teaching and practice

Learned through experience



Practice

Model

Encourage



# GOING DEEPER: Practice Facilitator Competency Assessment Tool



PRACTICE FACILITATOR COMPETENCY ASSESSMENT TOOL

NAME:

DATE:

CATEGORY	COMPETENCY	LEARNING: <i>I am unfamiliar</i> 0	KNOWLEDGE: <i>I know it</i> 1	SKILL: <i>I can do it</i> 2	WISDOM: <i>I can teach it</i> 3
Quality Improvement	Develop metrics to support the use of data to achieve goals and objectives.	0	1	2	3
	Assess the practice and provide performance feedback.	0	1	2	3
	Apply and/or interpret findings from the following methods and tools:				
	→ Plan-Do-Study-Act Cycle	0	1	2	3
	→ Pareto Chart	0	1	2	3
	→ Process Mapping and Flow Diagram	0	1	2	3
	→ Root Cause Analysis: Fishbone Diagram, Problem Tree, 5 whys	0	1	2	3
	→ Run Chart	0	1	2	3
Group Process / Team Building	Encourage independence and capacity building without over-reliance on the coach.	0	1	2	3
	Facilitate meetings.	0	1	2	3
	Manage projects.	0	1	2	3
Humble Inquiry	Observe, actively listen, and/or use open-ended and clarifying questions to elicit, understand, and facilitate team's thought process to identify solutions and actions.	0	1	2	3
Relationship Building	Develop a trusting, influential relationship with the practice by demonstrating vulnerability, self-awareness, and integrity.	0	1	2	3
Change Management	Build team capacity and competence to respond to change and critical events.	0	1	2	3
	Engage the support and commitment of executive leadership.	0	1	2	3
Conflict Resolution	Identify obstacles/barriers to success and help navigate appropriate resolution.	0	1	2	3
Inspiration	Build the practice's belief in its ability to change and motivation to do so.	0	1	2	3

# What does a coach do?

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# The Practice Facilitation Handbook

Training Modules for New Facilitators and Their Trainers



**AHRQ**  
Agency for Healthcare Research and Quality  
Advancing Excellence in Health Care • www.ahrq.gov



Prevention & Chronic Care Program  
IMPROVING PRIMARY CARE

<https://www.ahrq.gov/sites/default/files/publications/files/practicefacilitationhandbook.pdf>

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Figure 3.1. Common stages in a practice facilitation intervention



Source: Adapted from Knox, 2010.

AHRQ Practice Facilitation Handbook: <https://www.ahrq.gov/professionals/prevention-chronic-care/improve/system/pfhandbook/mod3.html>



"Coaches offer a structure, time, and place for practices to solve their own problems."

—Humboldt Del Norte Foundation, a Robert Wood Johnson Aligning Forces for Quality participant



### PART 1: Laying the foundation for success



### PART 2: Active Practice Coaching

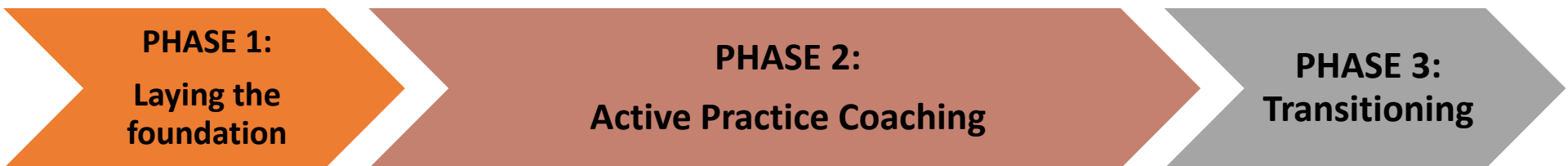
- Convener
- Facilitator
- Agenda Setter
- Task master
- Skill builder



### PART 3: Transitioning

- Skill builder
- Knowledge broker
- Sounding board
- Problem solver
- Change agent

Spend 50% of your relationship duration in active practice coaching.

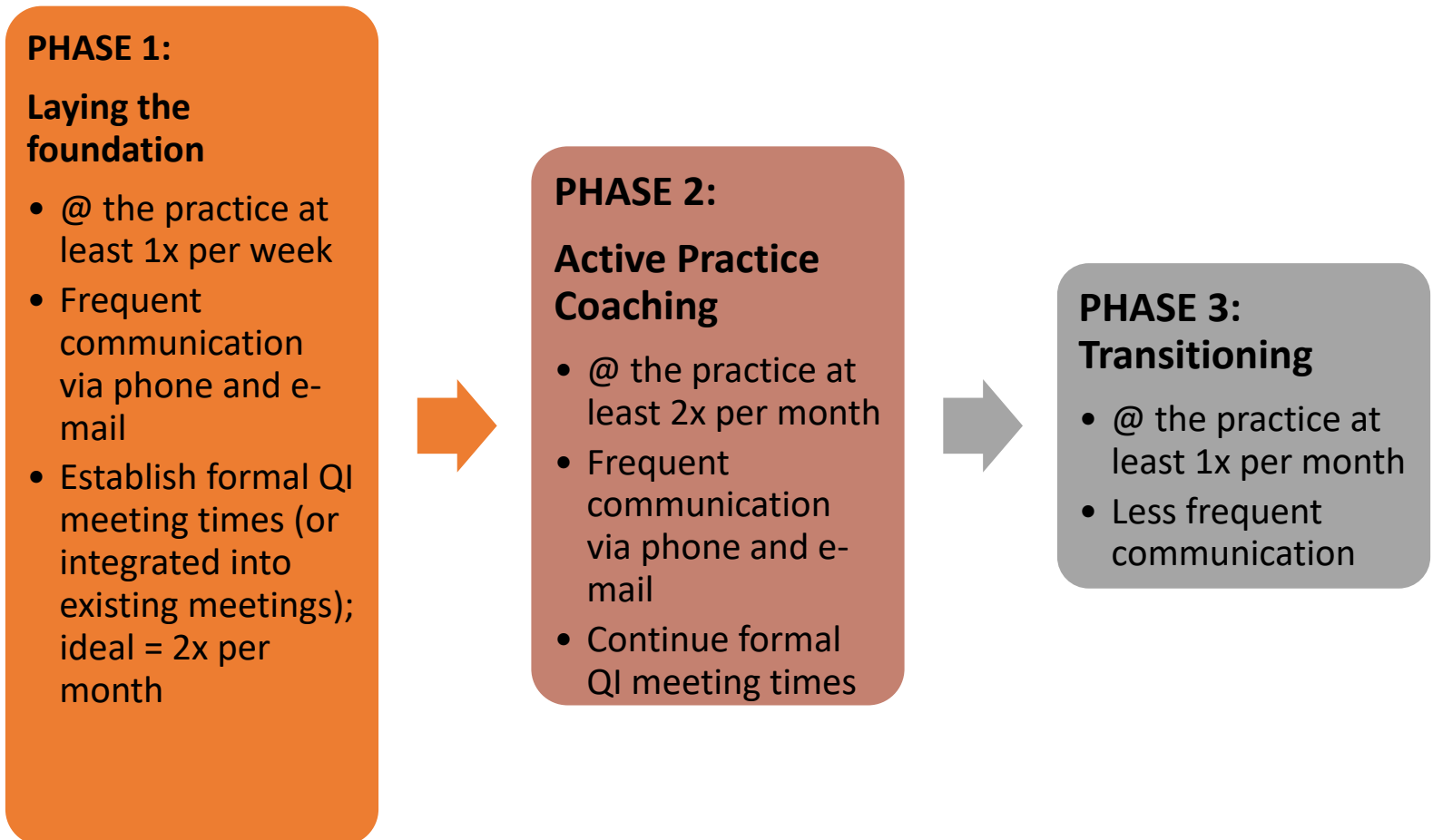


**PHASE 1:**  
Laying the  
foundation

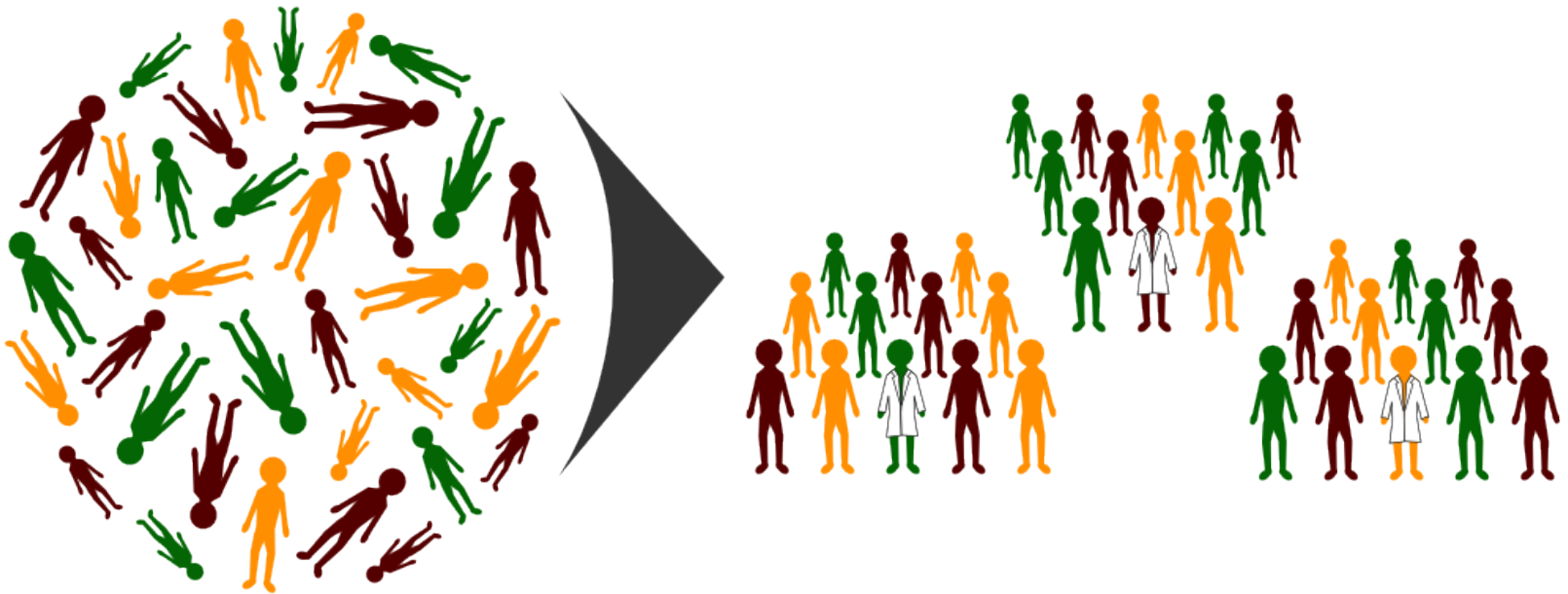
**PHASE 2:**  
Active Practice Coaching

**PHASE 3:**  
Transitioning

# Phase 1 is the most time-intensive.



Empanel and risk stratify your ~~patients~~ practices.



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What is the ideal panel size (for coaches)?





# POLL: How many practices do you work with?

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# How do I start working with a practice?

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# PHASE 1: Laying the foundation for success

## OBJECTIVES:

- Introduce yourself and the program design, goals, benefits, requirements.
- Learn about the practice and team, including barriers, supporters, location.
- Get acquainted with members of the team and generating momentum for the start of the project.

## ACTIVITIES:

- Connect informally with leadership about vision, expectations, insight into how to achieve goals.
- Identify and meet informally with your practice counterpart.
- Obtain commitment for recurring meeting time.
- Facilitate practice self-assessment.
- Set micro-aims and goals.
- Orient the team to the work and Model for Improvement.



# PTI Practice Coach Roadmap

## Prerequisite Steps:

- Hire practice coaches
- ID / Convene Guiding Coalition
- Finalize Aim Statement
- ID pilot practices & physicians

1 "Warm" Introduction to Practices

- Identify relationship / leadership to leverage for warm handoff
- Intro to PTI and expected process for practice partners / "champions"
- Who else needs to be involved?
- Address questions / concerns

2 Kickoff Meeting / Launch

- Introduce PTI (What?)
- Introduce MFI (How?)
- Review Practice Coach role (Who?)
- "What do we know?"  
(review *available* data)
- Define "mini Aim" – where to start?
- "What MORE do we need to know?"  
(plan addt'l assessment)
- Define next steps & meeting infrastructure

3 Opportunities Assessment

- Brainstorming session
- What drives current performance?
- Hunches / Theories to test
- Define method of data collection
- Conduct initial assessment (PAT, e.g.)

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4 ID Changes / Test

- Share assessment findings
- Brainstorm solutions / changes to test
- Agree on and conduct small scale tests
- Learn, adjust
- Adapt, Adopt, Abandon

**X** Practice Coach Training!

You are here!

# Getting to know the practice

Obtain warm hand-off from organizational leadership.

Introduce the initiative and secure commitment to participate.

Identify and meet with your practice counterpart or team lead.

Get commitment and set recurring team meeting time for duration of the coaching relationship.

# Be there.



- Observe.
- Understand.
- Reflect.
  - Identify strengths.
  - Acknowledge struggles.



# TOOL: Observation Techniques



**Crystal Eubanks** ▶ **Practice Facilitation Coaches**

For coaches wondering how to get started with a practice, observation is a great tool to gather information about how a practice works and share reflections with the care team on their strengths and opportunities. I usually ask to spend a morning or afternoon in the practice's waiting room in order to get more familiar with how they work. Here's a link to more guidance when observing:

[www.wearecatalysts.org/toolkit/11](http://www.wearecatalysts.org/toolkit/11)

@PracticeFacilitationCoaches



**Tools :: Catalyst**

<http://www.wearecatalysts.org>

Comment Share View message - Dec 5, 2016 at 11:20 am from web





# GO DEEPER: Understand Small Primary Care Practices

- Health Affairs Article:

## Small Primary Care Practices Face Four Hurdles in Becoming Medical Homes

<http://content.healthaffairs.org/content/31/11/2417.abstractmes>

# Functions of the 1<sup>st</sup> Meeting

## Build Relationships and Trust

- Establish relationship and credibility.
- Introductions: Ask questions to elicit more detail and to show interest in each individual.

## Establish Ground Rules and Expectations

- Meeting time, location, who will be there
- Roles: facilitator, project manager, notetaker, agenda setting
- Clarify aim, project

## Identify strengths and concerns

- Baseline data (if available)
- Barriers that may impact ability to succeed
- strengths that can help the team succeed

## Share tools and resources that can support a team getting started

# Prepare for the 1<sup>st</sup> meeting.

## BEFORE

- Set: Date, Time, Location
- Contact team members for attendance
- Do some research about the practice, team members, leadership.
- Reach out to leadership (local and exec) for vision and expectations.
- Develop agenda.

## DURING

- Assign responsibilities and expectations for meeting-related duties like note-taker, agenda setting.
- Facilitate.
- Observe.
- Take notes for yourself.

## AFTER

- Summarize your visit and record your observations.
- Send a thank you note acknowledging time and effort of team members and leadership and letting them know you will be following up soon with answers to questions and next steps. Include your contact info and best times and ways to reach you.
- Send follow-up resources, materials.
- Ensure notes are distributed to the group.



# IDEA:

## Kick-off Meeting Agenda Items

You (and your counterpart) determine which items to prioritize, the sequence, and how to facilitate.

Ideas (pick and choose what is important instead of doing all of these):

- Review overall initiative and expectations for the practice's participation.
- Clarify role of the coach and other team roles.
- Assign meeting-related duties.
- Establish ground rules for meetings.
- Have team lead share their vision for the project and participation.
- Have leadership share vision and how they intend to support the initiative.
- Share concerns and enthusiasms (verbally or written).
- Have the team complete an activity together
- Review available data.
- Ask for feedback as a coach and facilitator.
- Identify key activities to accomplish by the next meeting.
- Review action items and next meeting time.
- Debrief.





# TOOL: Kick-off Meeting Checklist

## Kick-off Meeting Checklist

### Guidelines for a Successful Meeting:

<b>Prepare for the Meeting</b>	<input type="checkbox"/> Develop an Agenda ( <i>See Template and Example</i> ) <input type="checkbox"/> Use Meeting Notes Template with Action Tracker ( <i>See Template</i> ) <input type="checkbox"/> Secure Room and send invite listing objectives for the meeting <input type="checkbox"/> Contact attendees to fulfill meeting roles: <ul style="list-style-type: none"> <li>○ Facilitator</li> <li>○ Note-taker</li> <li>○ Timekeeper</li> <li>○ Other</li> </ul> <input type="checkbox"/> Develop meeting objectives (what do you want to walk away with?)
<b>During the Meeting</b>	<input type="checkbox"/> Start/End on time <ul style="list-style-type: none"> <li>○ Check-in with the team regarding agenda progress</li> <li>○ Make agreements to alter agenda, if appropriate</li> </ul> <input type="checkbox"/> Set ground rules (See Template) <input type="checkbox"/> Evaluate the meeting <ul style="list-style-type: none"> <li>○ Use a quick 3-question survey</li> <li>○ Verbal sharing of +/- ▲</li> </ul>
<b>After the Meeting</b>	<input type="checkbox"/> Follow-up on action items <ul style="list-style-type: none"> <li>○ E-mail Action Tracker to team</li> </ul>

### During the Meeting:

<b>Set the Stage</b>	<input type="checkbox"/> Make Introductions (Who is in the room?) <ul style="list-style-type: none"> <li>○ Introduce the sponsor</li> <li>○ Introduce/review the role of the Practice Coach <b>*ELEVATOR SPEECH</b></li> </ul> <input type="checkbox"/> Review Agenda <ul style="list-style-type: none"> <li>○ Provide objectives for the meeting</li> </ul> <input type="checkbox"/> Introduce PTI
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- <https://pbgh.box.com/s/454mbn39575wh4p01j4u0zayrneubjzu>



## BEST PRACTICE: Create a standard kick-off meeting agenda and template.

- Collaborate with your coach colleagues.
- Adapt for each new practice, as necessary.



# Leverage your peers on Socialcast!

- ✓ Post your favorite 1<sup>st</sup> meeting agendas
- ✓ Post your favorite meeting tools: agenda templates, icebreaker activities.



# TOOL: Agenda Template

Facilitator:

Note taker:

Timekeeper:

TIME	ACTION	TOPIC	WHO
10:00	REVIEW	Action Items from Previous Meeting	Facilitator
10:05	DECIDE	Baseline Data to Use	
10:20	DISCUSS	PICK Chart for Improvement Ideas	
10:50	ACTION ITEMS	Review action items, date, and person responsible. Next Meeting 6/13/16: <ul style="list-style-type: none"><li>Facilitator: LB</li><li>Note-taker: ML</li><li>Time manager: NR</li></ul>	Facilitator or Note-taker
10:55	CHECK-IN / DEBRIEF	<ul style="list-style-type: none"><li>What worked well in this meeting?</li><li>What could we do better?</li></ul>	Facilitator

**ACTION ITEMS** from last meeting (with completion date, person responsible):

**FUTURE TOPICS** (with date to be discussed):

**Facilitation Schedule:**



# TOOL: Communication Approaches

## GENEROUS LISTENING

- Notice your own listening
- Pay attention
- Listen for the content of the communication
- Listen for the feelings of the speaker
- Listen for the unstated commitment of the speaker

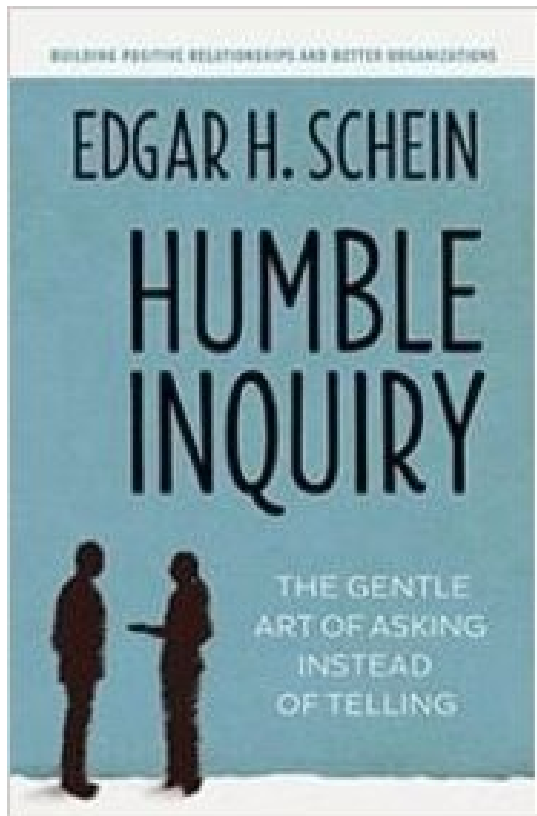
## HUMBLE INQUIRY

- Ask respectful questions.
- Listen attentively.
- Focus on the person, not the problem.
- Support the person to solve her own problem.
  
- Example questions:
  - What 's the problem you are trying to solve?
  - How would you describe what's happening vs. what should be happening?
  - What have you looked at or heard?
  - What makes you sure you have a cause/effect link?
  - What have you thought of trying?
  - What impact do you expect that change to have?



# GO DEEPER: Humble Inquiry

- Read:



- Read:

[Practical Guidance for Using Humble Inquiry in PDCA Problem Solving and Coaching](#)

<http://www.lean.org/common/display/?o=3109>



IDEA:

# Coaching Team to Set Goals and Targets

## FOCUS

### WHEN:

- Many points of view or lack of consensus
- Analysis Paralysis
- Wide or creeping scope
- Multiple, complex, or vague problems

### HOW:

- Ask about priorities.
- Reflect themes you hear often.
- Use rapid, iterative cycles for feedback.
- Ask about feasibility: time, resources, impact.
- Divide group into smaller groups.
- Remind the team that QI is a continuous: there will be future opportunities to build upon what happens in this project.

## EXPLORE

### WHEN:

- Lack of engagement or motivation, or interest
- Concerns or fears are present.
- Stuck on a solution before a goal or problem is defined.

### HOW:

- Practice humble inquiry and ask open-ended questions.
- Use brainstorming.
- Link back to the big picture.
- Reframe in important values.
- Air and document concerns – make a list, conduct a pre-mortem.



# RESOURCE: Practice Coaching Manual

Integrating Chronic Care and Business Strategies in the Safety Net: A Practice Coaching Manual

<http://www.ahrq.gov/professionals/systems/primary-care/coachmnl/index.html>

Includes activities, meeting agenda and minutes templates.

**CHAPTER 3: AN APPROACH TO PRACTICE COACHING** .....

    In a Nutshell .....

**PHASE I: Laying the Foundation for Success** .....

**PHASE II: Active Practice Coaching** .....

    Suggested Modifications to our Practice Coaching Approach ...

**REFERENCES**.....

**APPENDIX OF MEETING AGENDAS AND TOOLS** .....

**EXAMPLE: Practice Team Orientation Call Agenda**.....

**EXAMPLE: Practice Team Site Visit Preparation Call** .....

**EXAMPLE: Assessment Day Agenda** .....

**TOOL: Clinic Observation Assessment** .....

**EXAMPLE: Learning Session Agenda** .....

**TOOL: The “Change Your Practice” Menu** .....

**TOOL: Getting Started Logistics** .....

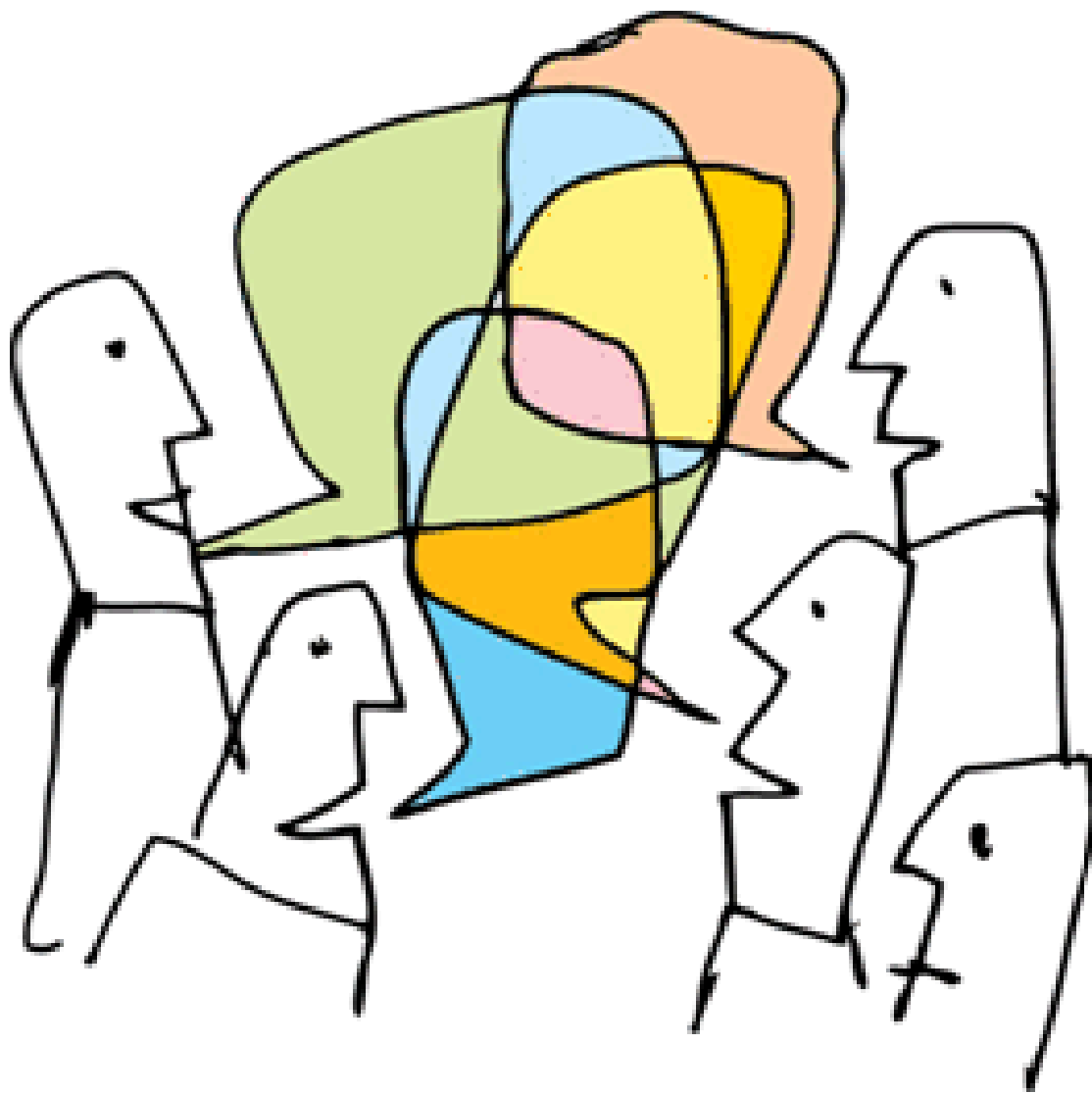
**TOOL: Tell Us What You Think!**.....





# TO DO LIST

- ✓ Connect with coaches on Socialcast by posting:
  - ✓ 1<sup>st</sup> Meeting Agendas
  - ✓ Favorite meeting tools
  - ✓ Scenarios or challenges for our February 22<sup>nd</sup> Learning Lab.
- ✓ Check out resources in the PTI Digital Library.
- ✓ Review tools and resources from today's workshop.



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12/5/2019





# UPCOMING EVENTS

- February 3<sup>rd</sup> @ 9:30am: Pre-Session Webinar for New Practice Coach Training
- February 8<sup>th</sup>-9<sup>th</sup> @ Claremont: New Practice Coach Training
- February 15<sup>th</sup> @ 1:00pm: Share & Learn Webinar – Population Management
- **February 22<sup>nd</sup> @ 1:00pm: Practice Facilitation Learning Lab**
- **March 3<sup>rd</sup> @ 10:00am: Practice Facilitation Skills Workshop – Tools for Coaches and Managers for managing your practice panel**
- March 15<sup>th</sup> @ 1:00pm: Share & Learn Webinar
- March 22<sup>nd</sup>-23<sup>rd</sup> @ Long Beach: 1o Building Blocks Training



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# Help us improve our offerings!



Share your feedback here:

<https://www.surveymonkey.com/r/PFSW-02-17>

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