Practice Facilitator Core Training Notebook

This document provides an overview of the Practice Facilitator Core Training, and contains items shared in the online curriculum including learning objectives, reflection questions and collated resources as well as space to document reflections and notes.

Curriculum Overview

The curriculum is broken down into four sections. Below is a list of the online courses under each section.

Introduction to Practice Facilitation

- Practice Facilitator Core Training Curriculum Overview
- Introduction to Practice Facilitation

Primary Care Transformation

- Primary Care - Where Patients Come First
- Introduction to Primary Care Networks
- The Alberta Patient's Medical Home Journey
- Implementation Elements Explained
- Introduction to the Health Neighbourhood
- Change Agents
- Diffusion of Innovations
- ACTT Change Packages
- Introduction to Panel and Continuity Part A
- Introduction to Panel and Continuity Part B
- Introduction to Health Quality Council of Alberta Panel Reports
- Strategies for Engagement Part A
- Strategies for Engagement Part B
- Building Readiness and Importance

Quality Improvement

- Introduction to Quality Improvement
- Form an Improvement Team
- Clarify the Problem or Opportunity
- Interpreting a HQCA Panel Report
- Process Mapping
- Model for Improvement Part A
- Model for Improvement Part B
- Model for Improvement Part C
- Sustain the Gains
- Spread the Successful Changes and Celebrate Success

Modes of Influence

- Introduction to Modes of Influence
- Coaching Approach to Practice Facilitation
- Generational and Interpersonal Styles
- Navigating Challenging Behaviours
- Addressing Conflict
- Facilitating a Team Meeting
- Facilitating a Brainstorming Session
- Consensus-Building
- Project Management for Practice Facilitators

Course Name: ***Practice Facilitator Core Training Curriculum Overview***

This course will review:
- Format for the courses.
- Tools and resources.
- Curriculum schedule.
- Curriculum learning objectives.
- Criteria to receive a Certificate of Achievement.

Course Resources:
- Practice Facilitator Core Training Notebook (PDF)
- Practice Facilitator Core Training Notebook (MS Word)
- Collated resources
- Practice Facilitator Core Training Overview
- Practice Facilitator Core Training Glossary
- Join the Practice Facilitator Network
- Join the Physician Champion Network
- Join the Electronic Medical Record Network

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Accelerating Change Transformation Team

Course Name: ***Introduction to Practice Facilitation***

Learning Objectives:

By the end of this course, you will be able to:

- Describe the benefits of practice facilitation in achieving the Patient's Medical Home in Alberta.
- Describe the role Practice Facilitators play in supporting clinic teams to implement and sustain process improvements in their local context.

Reflection Questions:

- Reflect on your starting place for this Practice Facilitator journey. Consider what previous experience will be most helpful.
- Why do you think practice facilitation is important? How will it support transformation of our health system? For patients? For providers and teams?

Course Resources:

- Patient's Medical Home benefits
- Scaling Up Primary Care Transformation in Alberta full report
- Scaling Up Primary Care Transformation in Alberta summary
- Practice Facilitation evidence summary

- Practice Facilitation full summary
- The case for Practice Facilitation in Primary Care
- Practice Facilitator job description
- Practice Facilitator competencies
- Change Agent competency model
- Practice Facilitator self assessment

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Accelerating Change Transformation Team

Course Name: ***Primary Care: Where Patients Come First***

Learning Objectives:

By the end of this course, you will be able to:

- Explain how primary care is delivered in Alberta.
- Describe the vision for transformation of primary care in Alberta, specifically, the Patient's Medical Home and Health Neighborhood.

Reflection Questions:

- As a patient, why is primary care important to you?
- What do you see as the benefits for patients when the vision for transformation of primary care in Alberta is achieved?

Course Resources:

- [ACTT website](#)
- [White paper key messages](#)
- [White paper summary](#)

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Accelerating Change Transformation Team

Course Name: ***Introduction to Primary Care Networks***

Learning Objectives:

By the end of this course, you will be able to:

- Describe what Primary Care Networks are.
- List the four provincial Primary Care Network objectives.
- Describe provincial PCN governance structures and how they support health system transformation.

Reflection Questions:

- Do you know what PCN your doctor belongs to? Are you aware of supports and services available through your PCN?
- How do the services or programs in the PCN you work within align with the four provincial PCN objectives? What is an example of a program or service for each objective?

Course Resources:

- [Provincial PCN governance and leadership structure](#)

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Accelerating Change Transformation Team

Course Name: ***The Alberta Patient's Medical Home Journey***

Learning Objectives:

By the end of this course, you will be able to:

- Describe what the Patient's Medical Home is.
- Describe the history and progress of Patient's Medical Home transformation in Alberta.
- Explain the value and benefits of the Patient's Medical Home model.

Reflection Questions:

- Reflect on the definition of a Patient's Medical Home. As a patient, how does this align with your current experience?
- Think about a clinic that you work with. How well does the clinic align to the 10 pillars of the PMH?

Course Resources:

- The Patient's Medical Home – Provincial Report Card 2019
- A new vision for Canada: Family Practice—The Patient's Medical Home 2019
- 2017 PMH evidence review
- 2020 PMH systematic review
- One Nail at a Time podcast

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Accelerating Change Transformation Team

Course Name: ***Implementation Elements Explained***

Learning Objectives:

By the end of this course, you will be able to:

- Define each of the Patient Medical Home Implementation Elements.
- Describe the relationship between the College of Family Physicians of Canada's Patient Medical Home vision and Alberta's Patient Medical Home Implementation Elements.

Reflection Questions:

- Consider your own family doctor's clinic. Which implementation elements do you see in action?
- Consider a clinic you work at or support. What are some examples of the implementation elements in action?

Course Resources:

- [ACTT PMH web page](#)
- [Setting effective patient-centred goals](#)
- [Focus on health literacy](#)
- [Toolkit for time to TNA indicator](#)

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Accelerating Change Transformation Team

Course Name: ***Introduction to the Health Neighbourhood***

Learning Objectives:

By the end of this course, you will be able to:

- Describe what the Health Neighborhood is.
- Explain how the Health Neighbourhood is integrated with the Patient's Medical Home Model.

Reflection Questions:

- Reflect on a personal or family experience you had with healthcare in Alberta. How would an integrated health neighbourhood have impacted the care that was received?
- Reflect on any gaps you can currently see between a clinic you work at or support and the broader health neighbourhood. What would need to be done to achieve an integrated health neighbourhood?

Course Resources:

- [Alberta's Strategic Clinical Networks](#)

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Accelerating Change Transformation Team

Course Name: ***Change Agents***

Learning Objectives:

By the end of this course, you will be able to:

- Describe what a change agent is.
- Describe the different roles change agents play across the health care system in supporting Patient Medical Home transformation in Alberta.
- Define the Health Transformation Workforce.

Reflection Questions:

- What attributes do you think a good change agent possesses? Do you think people can learn to be change agents or they are naturally gifted?
- Would you identify yourself as a change agent? Who else in your organization enables transformation towards the Patient's Medical Home integrated within the Health Neighbourhood. Directly? Indirectly?

Course Resources:

- [Alberta's Change Agents: The ACTT View](#)
- [Growing Practice Facilitation in Primary Care – Evidence Review](#)
- [Growing Practice Facilitation in Primary Care – Full Evidence Review](#)
- [Evidence for Physician Champions and Practice Facilitators Working as Dyads](#)
- [Practice Facilitator Ratio Literature Summary](#)

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Accelerating Change Transformation Team

Course Name: ***Diffusion of Innovations***

Learning Objectives:

By the end of this course, you will be able to:

- Explain how Diffusion of Innovations can be used as a tool to assess people's readiness for change.
- Explain why engaging the early majority is key to spreading innovations like the Patient's Medical Home.

Reflection Questions:

- Reflect on a new idea or innovation others around you were adopting. Which adopter group do you think you fit into for this example? Is this always the case for new ideas?
- How do you think you can apply Diffusion of Innovation to facilitate change in your organization? What about outside your organization?

Course Resources:

- Diffusion of Innovations Handout
- Scaling Up report summary
- Scaling Up full report

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Accelerating Change Transformation Team

Course Name: ***ACTT Change Packages***

Learning Objectives:

By the end of this course, you will be able to:

- Describe what an ACTT change package is.
- Explain how ACTT change packages can be used to support clinic teams to advance their Patient's Medical Homes.

Reflection Questions:

- Review the change package summary for one of the ACTT change packages. How do you think the purpose and aim statement would support improvements to one of the PMH implementation elements?

Course Resources:

- [IHI website](#)
- [ACTT Change Packages](#)

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Accelerating Change Transformation Team

Course Name: ***Introduction to Panel and Continuity Part A***

Learning Objectives:

By the end of this course, you will be able to:

- Describe what panel is.
- List the resources available to support panel management.

Reflection Questions:

- What would be the value of having one family physician that you see most of the time?
- Who are the Panel Managers in your PCN? How might you work together to support a clinic team with process improvement?

Course Resources:

- Panel in Action training
- Panel resources
- EMR Network
- CII/CPAR
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Accelerating Change Transformation Team

Course Name: ***Introduction to Panel and Continuity Part B***

Learning Objectives:

By the end of this course, you will be able to:

- Explain the difference between relational, informational and management continuity.

Reflection Questions:

- Do you have good continuity with your family doctor? Do they know your values, preferences, and unique history? What could be improved with strong continuity with your family doctor?
- Whose role is it on a clinic team to "do" panelling? Do you think there is value in a patient having continuity with other providers in a clinic, not just their family physician?

Course Resources:

- Relational continuity evidence summary
- Continuity posters
- Relational continuity clinical practice guideline
- Relational continuity guideline summary
- Relational continuity change package summary

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Accelerating Change Transformation Team

Course Name: ***Introduction to the Health Quality Council of Alberta Panel Reports***

Learning Objectives:

By the end of this course, you will be able to:

- Describe what an HQCA panel report is.
- Explain how an HQCA panel report can be used to inform quality improvement work in a clinic.

Reflection Questions:

- How do you see yourself using the HQCA report with a clinic team to support improvement work?

Course Resources:

- HQCA panel reports
- CII/CPAR
- HQCA request panel reports
- Panel reports 101 PF webinar

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Accelerating Change Transformation Team

Course Name: ***Strategies for Engagement Part A***

Learning Objectives:

By the end of this course, you will be able to:

- Explain how Diffusion of Innovations can be used as a tool to make a strategic engagement plan.

Reflection Questions:

- When getting to know someone, what assumptions have you made that were not quite right? What caused you to make those assumptions in the first place?
- What questions might you ask a physician to understand where they fit on the Diffusion of Innovations curve for a change? What would you listen for? How else might you find out more about them and what they think about the change?

Course Resources:

- Diffusion of Innovations handout
- Scaling Up report
- Scaling Up report summary

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Accelerating Change Transformation Team

Course Name: ***Strategies for Engagement Part B***

Learning Objectives:

By the end of this course, you will be able to:

- List other change management approaches and how they can be used to engage physicians and clinic team members to take on new ways of working.

Reflection Questions:

- Think about a behavioural change that you have tried to make in the past? Were you successful the first time? What strategies did you find helpful to build importance? Once you took action, what helped you to build your confidence?
- If a physician is above the decision line for a change, what are some things you might try, to help them build importance, so they are ready to take action? What ideas can you leverage from the different change management approaches discussed?

Course Resources:

- The Prosci ADKAR® Model
- ADKAR
- HealthChange Methodology

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Accelerating Change Transformation Team

Course Name: ***Building Readiness and Importance***

Learning Objectives:

By the end of this course, you will be able to:

- Describe how linking features and benefits can help build readiness and importance.
- Explain what an elevator speech is and how to create one.

Reflection Questions:

- Think about something new that you were reluctant to try. What made you reluctant? What could have changed your mind?
- Think about a work experience where you were trying to encourage someone to take action. How did you prepare for that conversation? What worked well? What didn't?

Course Resources:

- [CME – Linking Learning](#)
- [Physician Practice Improvement Program](#)
- [Elevator speech template](#)

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Accelerating Change Transformation Team

Course Name: ***Introduction to Quality Improvement***

Learning Objectives:

By the end of this course, you will be able to:

- Describe what quality improvement is and why it is foundational to implementing the Patient's Medical Home.
- Explain what the ACTT Sequence to Achieve Change is and how it can be used as a tool to support clinic teams with the work of quality improvement.
- List the steps in the Sequence to Achieve Change.

Reflection Questions:

- How do you think the Sequence to Achieve Change can support a clinic team with quality improvement?

Course Resources:

- [Dr Mike Evans: An Illustrated Look at Quality Improvement in Health Care](#)
- [ACTT Sequence to Achieve Change one pager](#)
- [ACTT Sequence to Achieve Change workbook](#)
- [Example Sequence to Achieve Change workbook](#)

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Accelerating Change Transformation Team

Course Name: ***Form an Improvement Team***

Learning Objectives:

By the end of this course, you will be able to:

- Identify key considerations when forming a clinic quality improvement team.
- Explain the role the Practice Facilitator plays in supporting the quality improvement team.

Reflection Questions:

- In your personal life, what strategies have worked when trying to bring a group of people together?
- What might you say to a team member who is undecided about joining their clinic's QI team?

Course Resources:

- Quality improvement project team list
- Establishing team norms
- Improvement board worksheet

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Accelerating Change Transformation Team

Course Name: ***Clarify the Problem or Opportunity***

Learning Objectives:

By the end of this course, you will be able to:

- Explain why clarifying the problem is an important step in a team's quality improvement approach.
- Describe what a problem statement is.
- List the common sources of evidence and data clinic teams can use to create a problem statement.

Reflection Questions:

- Reflect on a time in your life that you didn't spend time clarifying the problem and jumped to solutions. What were the consequences of this?
- What might you say to a team member who shares "we know what the issue is, let's just start there". How could you help convince someone else of the importance of clarifying the problem or opportunity.

Course Resources:

- Differences in Team Mental Models Associated with Medical Home Transformation Success
- Writing a Problem Statement

- Project Charter Template
- Fishbone/Cause and Effect Template
- 5 Whys Template

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Accelerating Change Transformation Team

Course Name: ***Interpreting a HQCA Panel Report***

Learning Objectives:

By the end of this course, you will be able to:

- Describe how the Health Quality Council of Alberta Panel Report can be used to identify areas for improvement that a clinic team can focus on.

Reflection Questions:

- How would you go about deciding what to focus on as a team from all that is covered in the HQCA panel report? What ideas do you have on how to approach these conversations with physicians?

Course Resources:

- [HQCA Primary Healthcare Panel Reports](#)
- [HQCA Panel Report Login](#)
- [HQCA Recipe for Success Course](#)

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Accelerating Change Transformation Team

Course Name: *Process Mapping*

Learning Objectives:

By the end of this course, you will be able to:

- Describe what a process map is and how it can be used to support a clinic team with their quality improvement work.
- List the steps in creating a process map.

Reflection Questions:

- How do you think process mapping can support a clinic team with quality improvement?

Course Resources:

- How to make a peanut butter and jelly sandwich video
- Guided interview template
- Process mapping guide
- Team Roles & Responsibilities Guide

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Accelerating Change Transformation Team

Course Name: ***Model for Improvement Part A***

Learning Objectives:

By the end of this course, you will be able to:

- Identify the four components of the model for improvement.
- Recognize a strong aim statement.

Reflection Questions:

- Think about a personal change you would like to make. How would the model for improvement help you to implement this change? Think about what your aim statement might look like.

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Accelerating Change Transformation Team

Course Name: ***Model for Improvement Part B***

Learning Objectives:

By the end of this course, you will be able to:

- Distinguish between the three types of measures for improvement.
- Explain the difference between the collection and use of data for quality improvement, evaluation, research, and accountability.

Reflection Questions:

- When you've made a personal change, how did you know if it was working? What types of measures did you observe?

Course Resources:

- [Measurement plan worksheet](#)
- [Run chart guide](#)

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Accelerating Change Transformation Team

Course Name: ***Model for Improvement Part C***

Learning Objectives:

By the end of this course, you will be able to:

- Explain what to consider when selecting a potentially better practice to test.
- Describe the key steps in a test of change.

Reflection Questions:

- What worries you about facilitating the Model for Improvement with a clinic? How is this like other work that you have done?

Course Resources:

- ACTT Panel Process Change Package
- PICK Chart Template
- PDSA Workshop

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Accelerating Change Transformation Team

Course Name: *Sustain the Gains*

Learning Objectives:

By the end of this course, you will be able to:

- Explain the role a Practice Facilitator can play in supporting a clinic team to sustain their quality improvement gains.
- List common strategies to support clinic teams to sustain their quality improvement gains.

Reflection Questions:

- Think about a new habit that you adopted. Did you experience any backsliding along the way? What worked for you to make it sustainable?
- Think of a work project that had a lot of potential but was not sustained. What strategies do you think could have helped to make it sustainable?

Course Resources:

- QI Board Worksheet
- Team Huddle Guide
- 5 Tips to Sustain the Gains

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Accelerating Change Transformation Team

Course Name: *Spread the Successful Changes and Celebrate*

Learning Objectives:

By the end of this course, you will be able to:

- Distinguish between spread and scale.
- List the key strategies used to promote spread.
- Explain why clinic teams should celebrate success.

Reflection Questions:

- Can you think of a societal change that was successfully brought to scale? What factors do you think lead to its success?
- Explain why it is important for teams to celebrate successes along the way?

Course Resources:

- IHI's Seven Spreadly Sins Summary
- CII/CPAR Provincial Monthly Statistics

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Accelerating Change Transformation Team

Course Name: ***Introduction to Modes of Influence***

Learning Objectives:

By the end of this course, you will be able to:

- Describe five key pearls of facilitator wisdom that support the art of practice facilitation.
- List the seven key principles of adult learning.

Reflection Questions:

- Reflecting on your own journey as an adult learner, which of the seven principles resonates most with you? Can you think of a learning experience that was effective for you because that principle was present?
- When it comes to facilitating a team, how would you compare your first experiences to now? What would your own facilitation pearl of wisdom be?

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Accelerating Change Transformation Team

Course Name: *Coaching Approach to Practice Facilitation*

Learning Objectives:
By the end of this course, you will be able to:
• Describe eight basic coaching skills you can use to engage and support clinic teams.

Reflection Questions:
• Reflect on an example of a time that someone took a coaching approach with you, inside or outside of work, and individually or in a group setting. What was the impact of being on the receiving end of that approach?
• Which of the eight coaching skills do you find most challenging when facilitating a team?

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Accelerating Change Transformation Team

Course Name: ***Generational and Interpersonal Styles***

Learning Objectives:

By the end of this course, you will be able to:

- Identify differences between the generational groups that make up today's workforce.
- Describe how understanding peoples' interpersonal styles, including your own, can support higher team functioning.

Reflection Questions:

- Reflect on your own biases based on interpersonal styles and intergenerational differences.
- When would you use an interpersonal styles activity with a clinic team? In what ways do you think its use could enhance team functioning?

Course Resources:

- Colours Exercise Worksheet
- Colours Exercise Debrief Guide

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Accelerating Change Transformation Team

Course Name: ***Navigating Challenging Behaviours***

Learning Objectives:

By the end of this course, you will be able to

- Identify facilitation approaches that can be used to navigate common challenging behaviours.

Reflection Questions:

- Of the challenging behaviour "characters" introduced in this course, which one causes you the most concern and how would you improve your confidence in navigating this?
- Reflect on a time that you have encountered a challenging behaviour in a meeting. How would you facilitate a similar scenario in the future?

Course Resources:

- Navigating Challenging Behaviours Summary

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Accelerating Change Transformation Team

Course Name: ***Addressing Conflict***

Learning Objectives:

By the end of this course, you will be able to:

- Identify the difference between healthy debate and a dysfunctional argument.
- Describe three steps to facilitate a team through conflict.

Reflection Questions:

- Of the five conflict resolution approaches reviewed in this course, which one have you used the most? What would you need to work on to improve your confidence in using a collaborative approach to conflict resolution?

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Accelerating Change Transformation Team

Course Name: ***Facilitating a Team Meeting***

Learning Objectives:

By the end of this course, you will be able to:

- Describe the key components of facilitating an effective team meeting.

Reflection Questions:

- Reflect on an ineffective meeting you have attended or facilitated. If all the elements reviewed in this course had been incorporated, how might that have impacted the meeting?

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Accelerating Change Transformation Team

Course Name: ***Facilitating a Brainstorming Session***

Learning Objectives:

By the end of this course, you will be able to:

- Identify the steps to facilitating a brainstorming session.
- List the three prioritization tools for sorting and ranking ideas.

Reflection Questions:

- Consider a brainstorming session that you participated in that was a positive experience. How did the facilitator prepare and support the group to brainstorm effectively?

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Accelerating Change Transformation Team

Course Name: ***Consensus-Building***

Learning Objectives:

By the end of this course, you will be able to:

- List five different approaches to decision-making.
- Describe the consensus-building process.

Reflection Questions:

- Consider a decision-making process that you have been part of that did not use a consensus approach. What would the difference have been in process and outcome if consensus-building was used?

Notes:

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Course Name: ***Project Management for Practice Facilitators***

Learning Objectives:

By the end of this course, you will be able to:

- List key project management strategies and tools to keep improvement teams organized.

Reflection Questions:

- What organizational tools have you found helpful in managing personal or professional projects? Are there any from your previous experience or those introduced in the course that could support your Practice Facilitator role?

Course Resources:

- PDSA Worksheet
- Sequence to Achieve Change Workbook

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