



PCN Strategic
Forum

Purpose | Unity | Hope

Change at the PCN level: setting an audacious goal and crushing it

Westview PCN: Dr. Suzanne Squires, Dr. Carla Laidlaw

ACTT: Michelle Tobias-Pawl, Krystal Tom

November 25, 2022



2022 PCN Strategic Forum



Land Acknowledgement

The Alberta Medical Association acknowledges that we are located on Treaty 6, 7, and 8 territories; traditional lands of diverse Indigenous peoples including the Cree, Métis, Nakoda Sioux, Iroquois, Dene, Inuit, Blackfoot Confederacy, the Tsuut'ina First Nation, the Stoney Nakoda and many others whose histories, languages and cultures continue to influence our vibrant community. We respect the histories, languages and cultures of First Nations, Metis, Inuit, and all First Peoples of Canada, whose presence continues to enrich our vibrant community.



Disclosure of Financial Support

- This program has received no financial support or in kind support.



Mitigating Potential Bias

- The planning committee developed the conference objectives which do not include sponsorship products or services.
- There are no sponsorship funds that have been received for this event.
- The committee has reviewed the content of the presentations and ensured that content presented is evidence-based and free of undue influence.



Hold for Personal COI slide

- Dr. Suzanne Squires
 - I have/had an affiliation (financial or otherwise) with a for-profit or not-for-profit organization.
 - Westview PCN – Board Chair
- Dr. Carla Laidlaw
 - I have/had an affiliation (financial or otherwise) with a for-profit or not-for-profit organization.
 - Westview PCN – Medical Director
- Michelle Tobias-Pawl
 - I have/had an affiliation (financial or otherwise) with a for-profit or not-for-profit organization.
 - AMA Employee
- Krystal Tom
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 - AMA Employee



Acknowledgements

This workshop is modelled on principles of Change Management from:



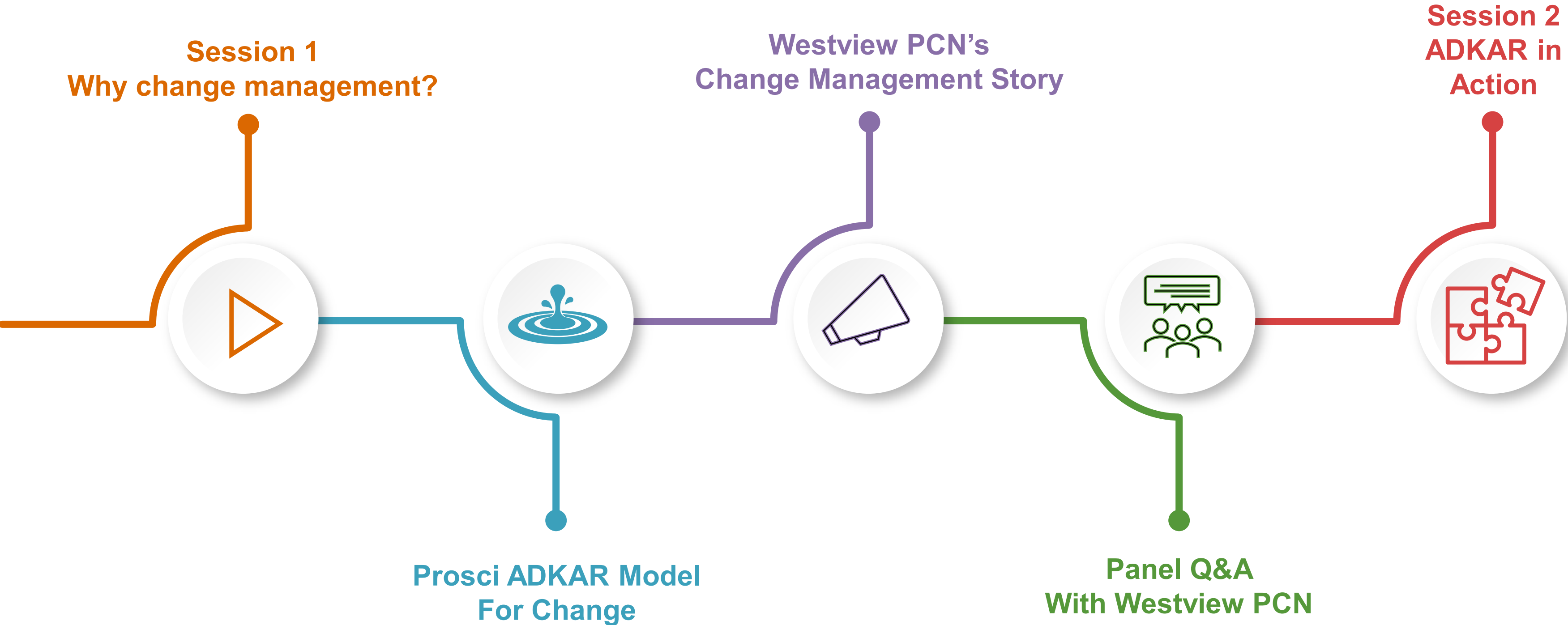
Housekeeping

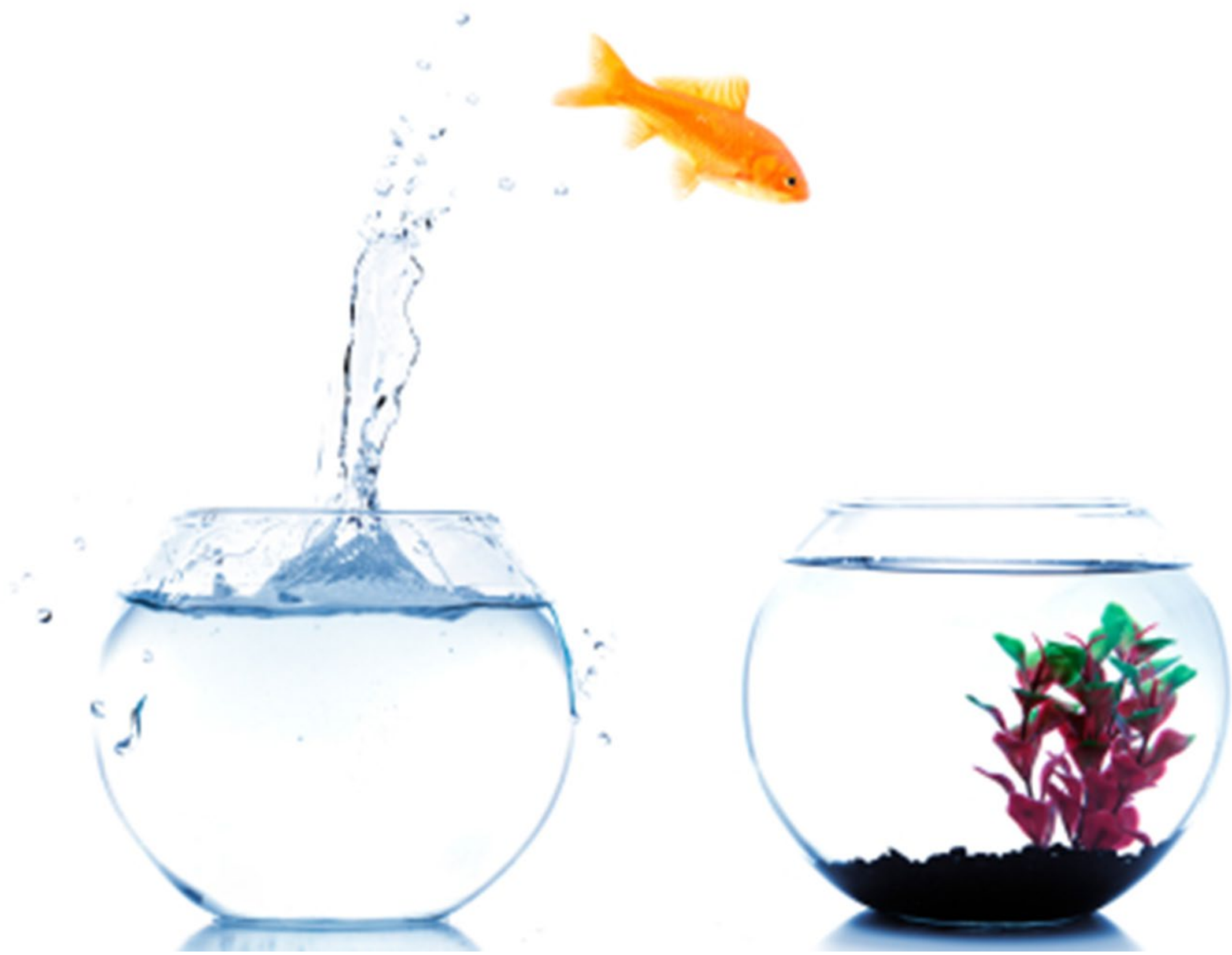


WIFI PASSWORD:
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Agenda





What is Change Management?



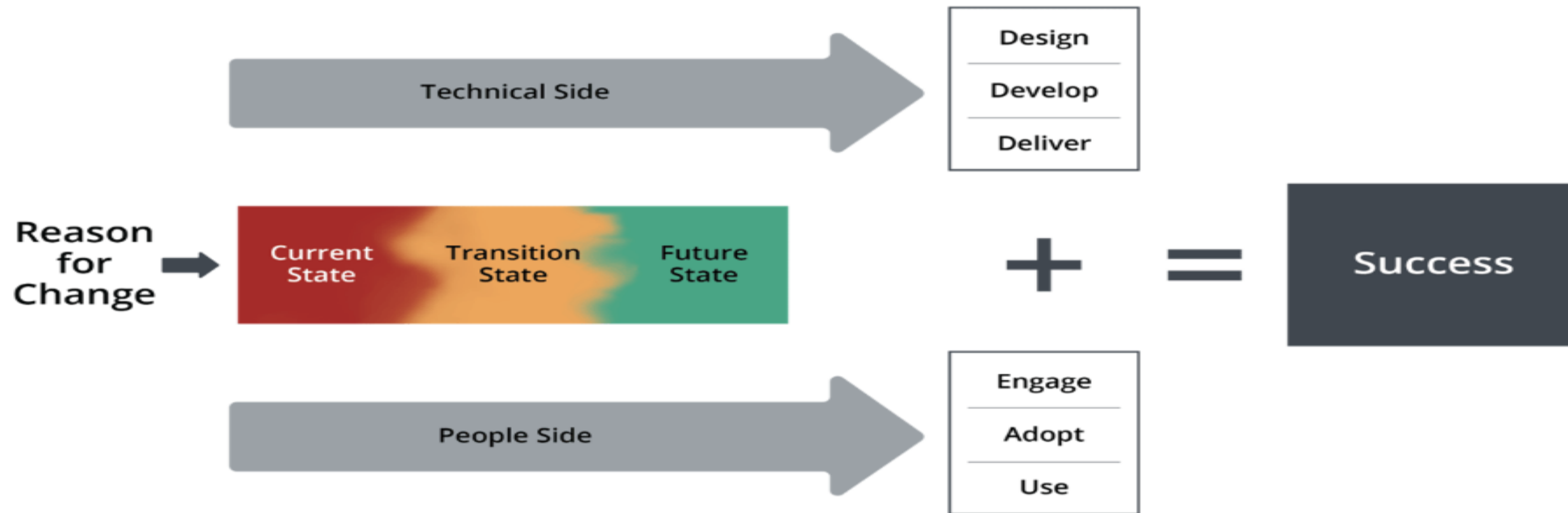
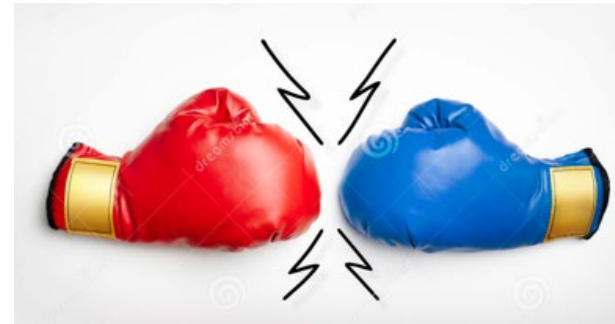
Process and Tools



People side of change



Change Management Vs. Project Management



Why Change Management?

With Change Management



Without Change Management

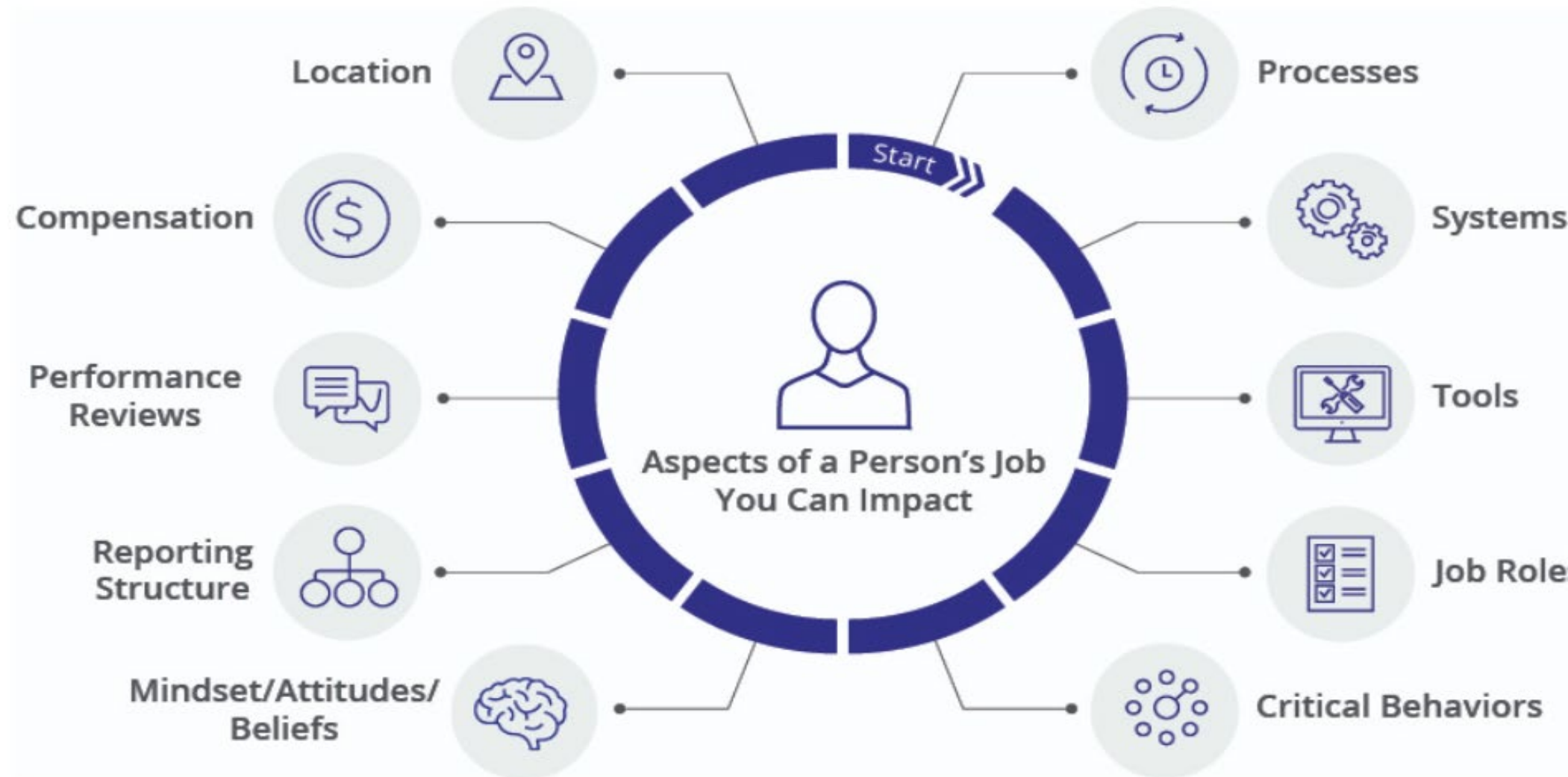




Change Management Inputs



Change Management Inputs



Prosci's 10 Aspects of Change Impact



Change Impact Assessment

Wonderful Outstanding Work (WOW) Project

WOW Project's Goal:

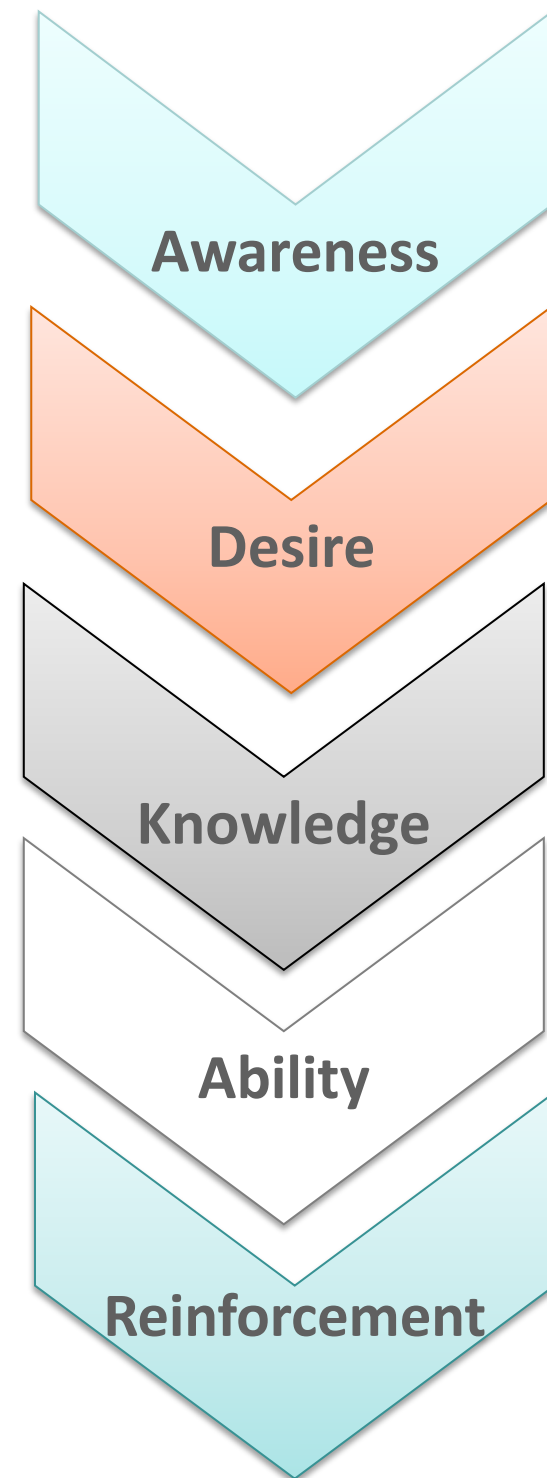
By January 1, 2023 the Strategic Forum PCN will implement a physician program designed to recognize physician/clinic progress in implementing the patient's medical home and for continuous quality improvement efforts with 5 Wonderful Outstanding Work (WOW) recognitions shared in the PCN newsletter by March 30, 2023.

Individual/ Group Impacted	Prosci's 10 Aspects of Change Impact (s)	Impact Comments	What is important to the stakeholder group?	Other Comments / Key Information
PCN Board	<ul style="list-style-type: none"> - Processes - Job Roles - Location 	<ul style="list-style-type: none"> - Submission review process - Addition of presenting the award to the clinic/physician - Travel to WOW clinic 	<ul style="list-style-type: none"> - Physician appreciation and recognition - Sustainability of the program 	- Would like to provide list of all WOW clinics/physician at the AGM
PCN Physician Members	<ul style="list-style-type: none"> - Process 	<ul style="list-style-type: none"> - Nomination process, Award Process 	<ul style="list-style-type: none"> - Easy processes - Positive appreciation, recognition and feeling supported 	- XX number physician members are participating in the PMH Program
PCN Staff	<ul style="list-style-type: none"> - Processes - Critical Behaviors 	<ul style="list-style-type: none"> - Nomination process, Award Process - Identifying and recognizing a clinic/physician by submitting WOW nominations 	<ul style="list-style-type: none"> - Easy and fast nomination process - Recognizing the great work of the teams, clinics and physicians they work with 	- XX number of PCN interdisciplinary team members are decentralized working embedded in clinics



ADKAR – Model for Change

The 5 Elements of Successful Change



- Of the need for change
- “I understand why...”

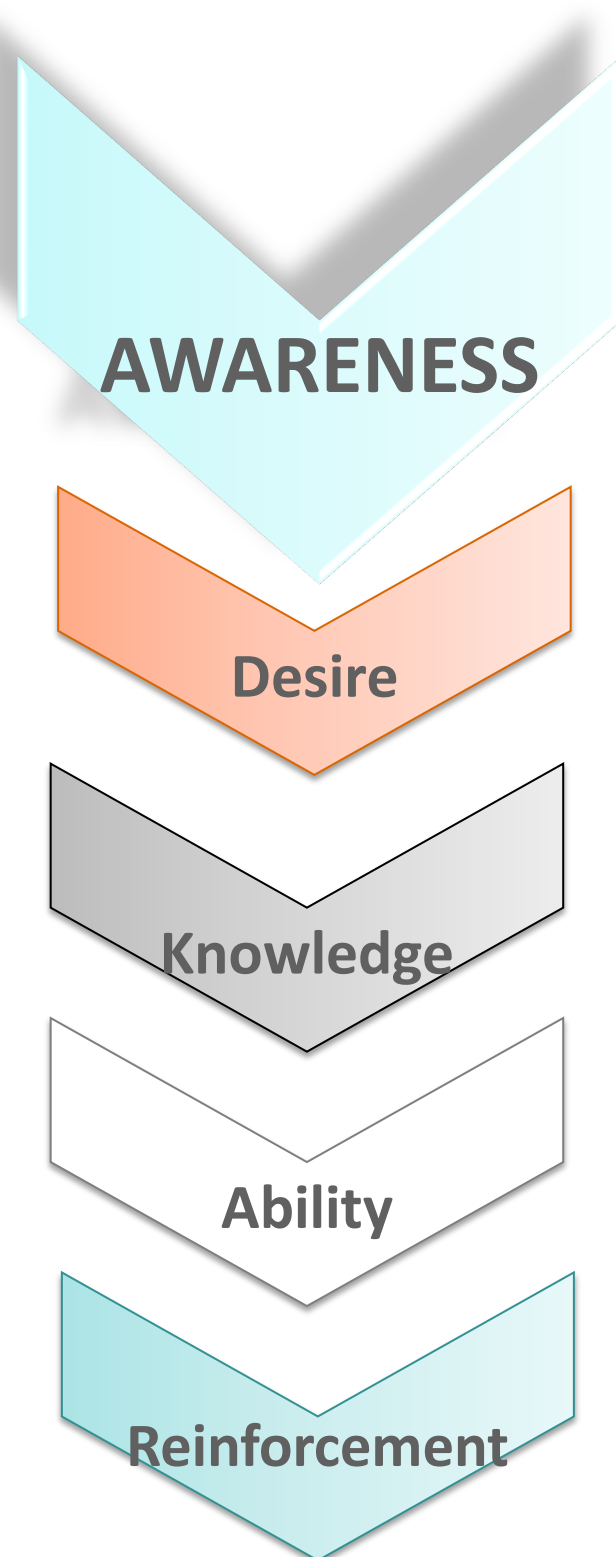
- To participate and support the change
- “I have decided to...”

- On how to change
- “I know how to...”

- To implement the required skills and behaviours
- “I am able to...”

- To sustain the change
- “I will continue...”





Awareness: of the need to change

Change begins with understanding why

#1 reason for resistance to a change is a lack of awareness of why a change is being made.

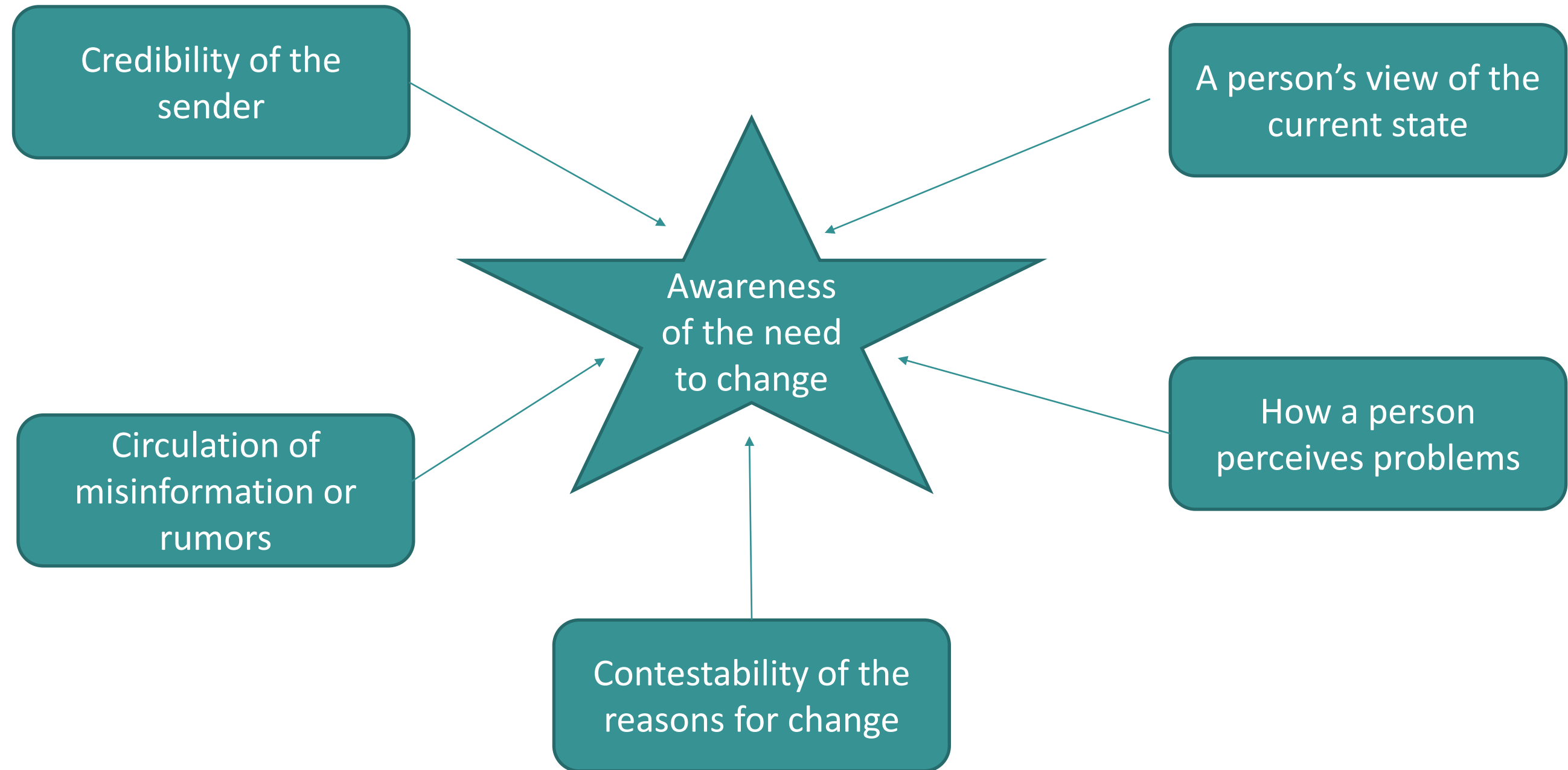
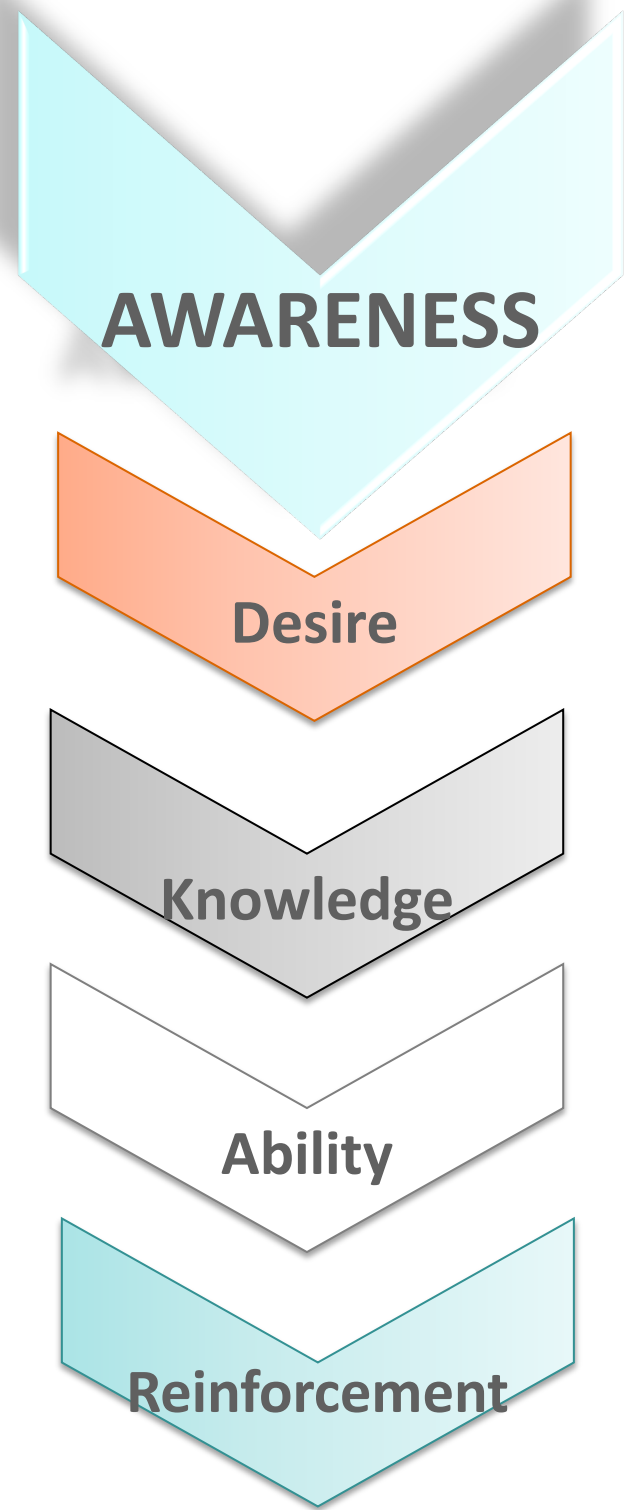
To build awareness, individuals need to understand:

1. What is the nature of the change?
2. Why is the change being made and what are the risks of not changing?
3. How will the change impact our organization or community?
4. What's in it for me? (WIIFM)



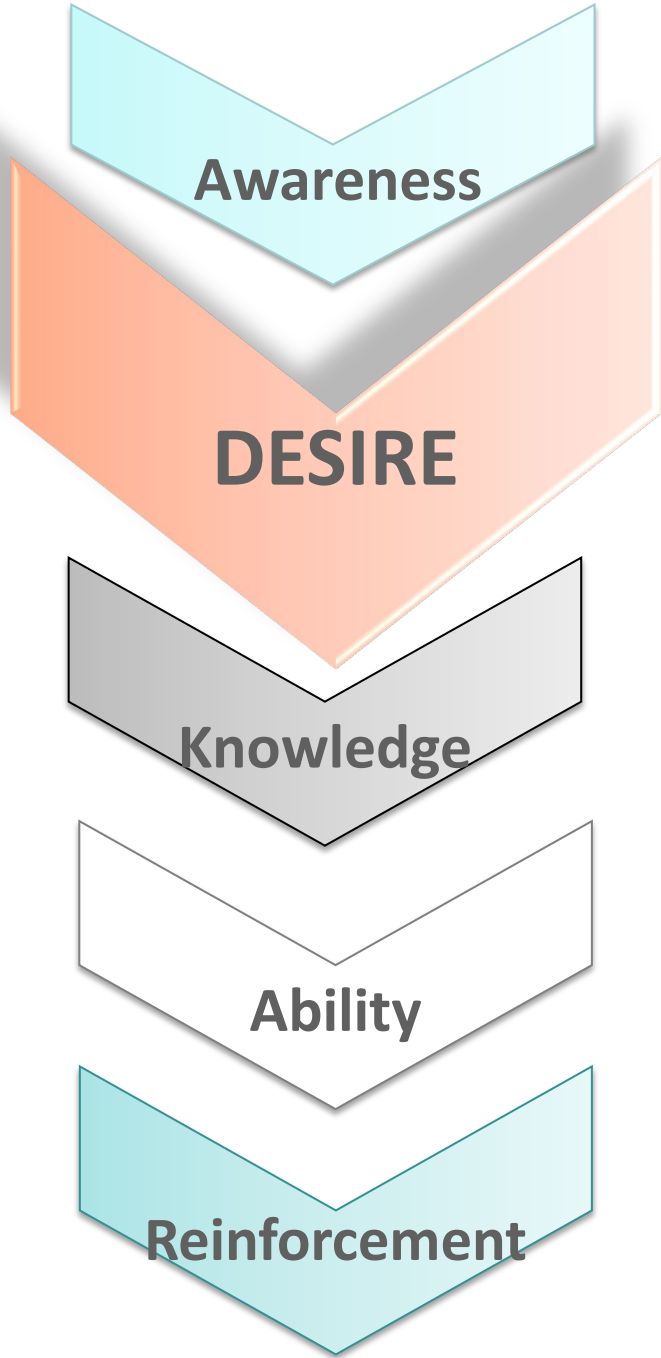
Awareness: of the need to change

Awareness Factors



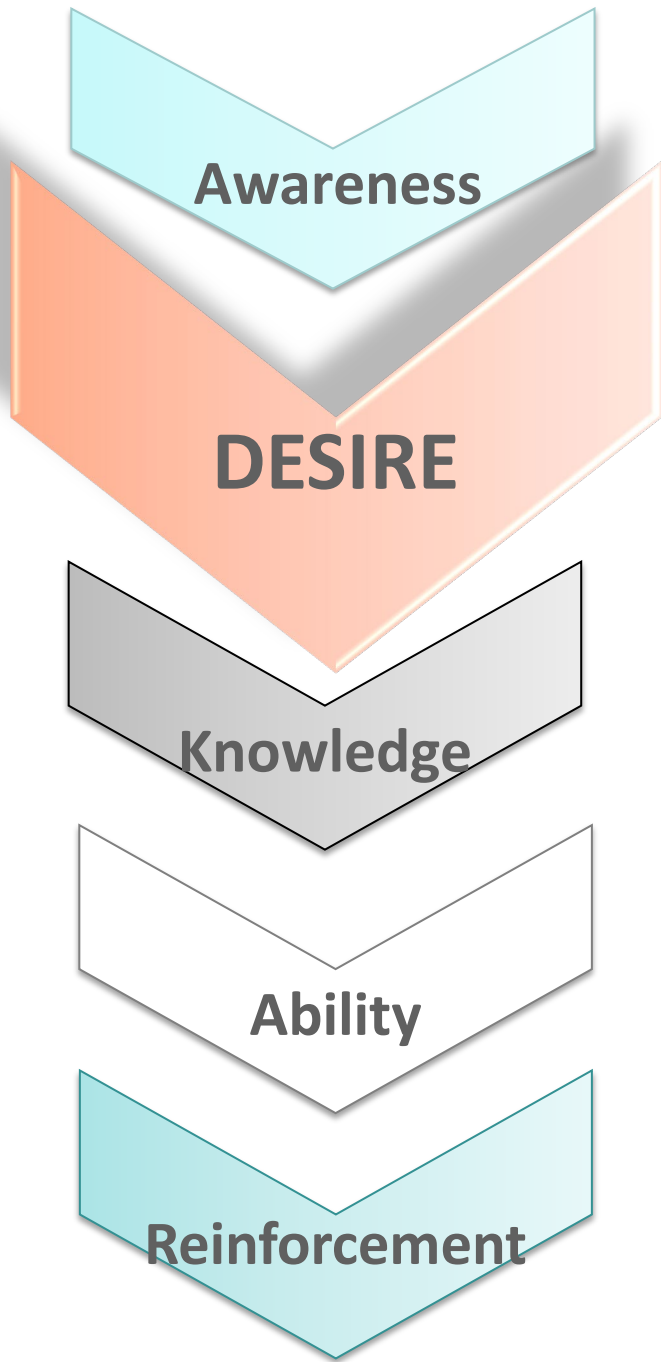
Desire: to participate and support the change

Awareness does not always = Desire



Desire: to participate and support the change

Desire Factors



What is the change and how will it impact me?



Another change and project? I'm already so busy.



I only have a year left until retirement.

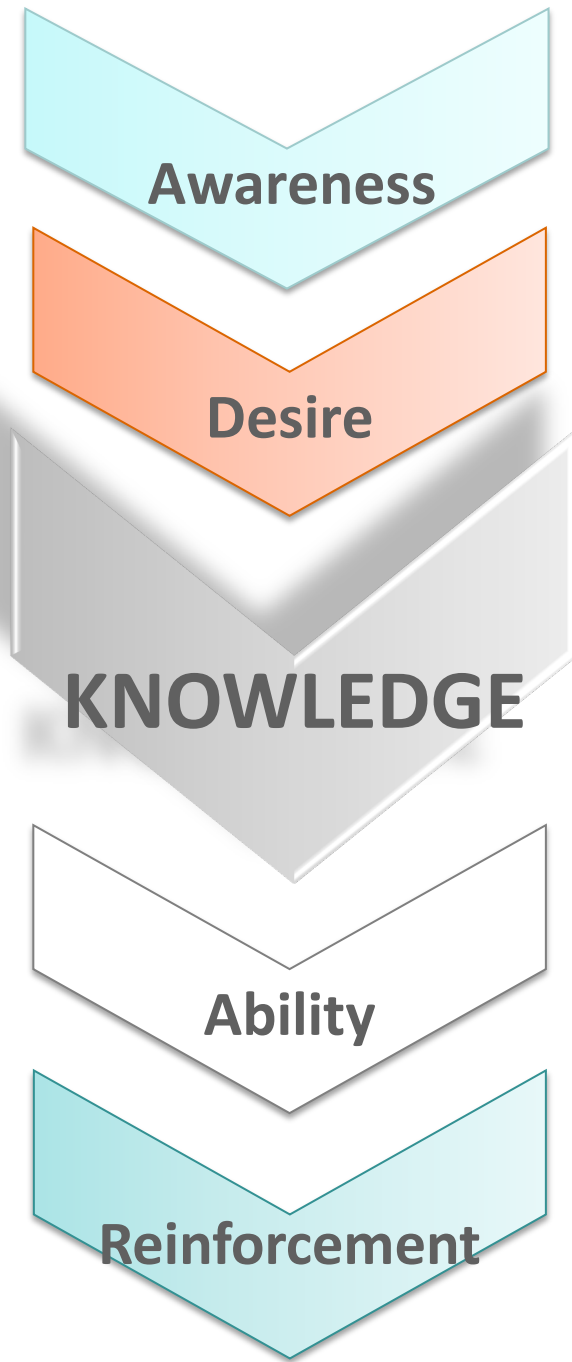


I don't think I can learn a new EMR, I'm not techy!



Knowledge: on how to change

Understanding how to change is essential



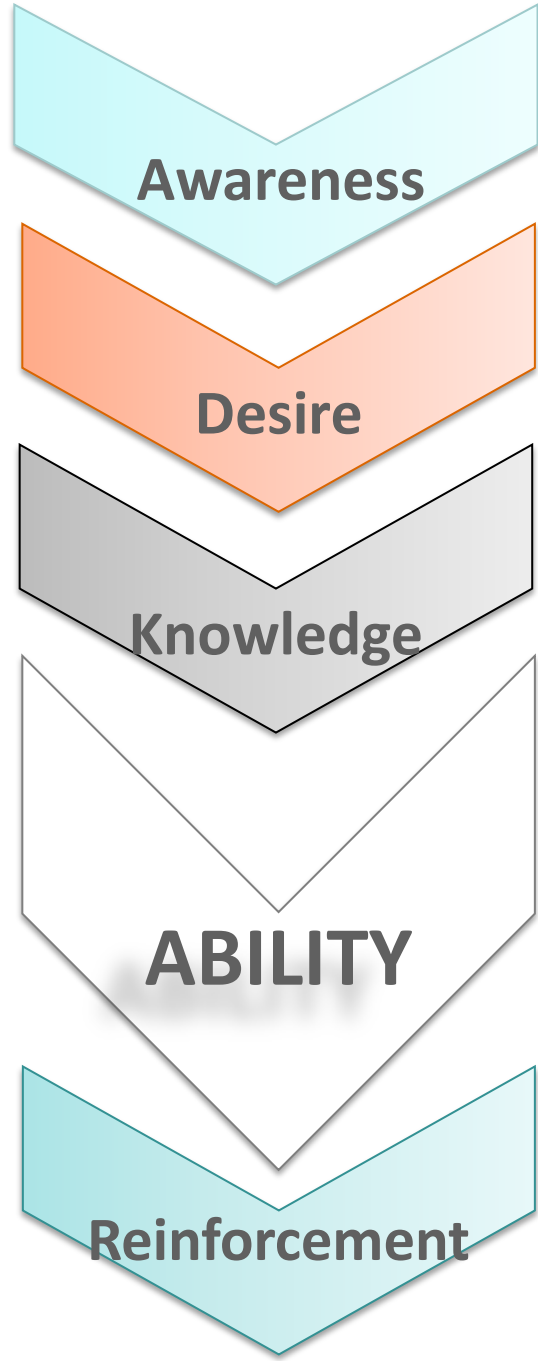
Knowledge Factors

1. Current knowledge
2. Capacity to learn
3. Resources for training
4. Access to the required knowledge



Ability: to implement the desired skills and behaviours

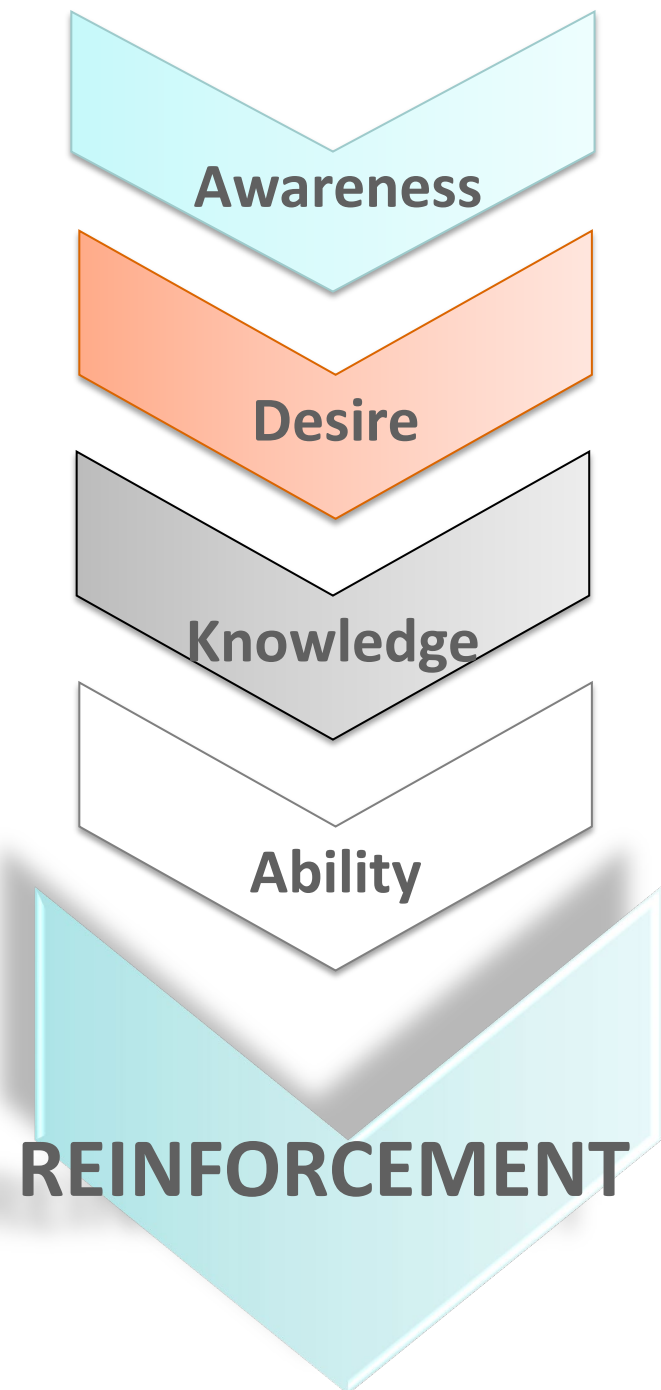
When ability is achieved the change is visible in action



Reinforcement: to sustain the change

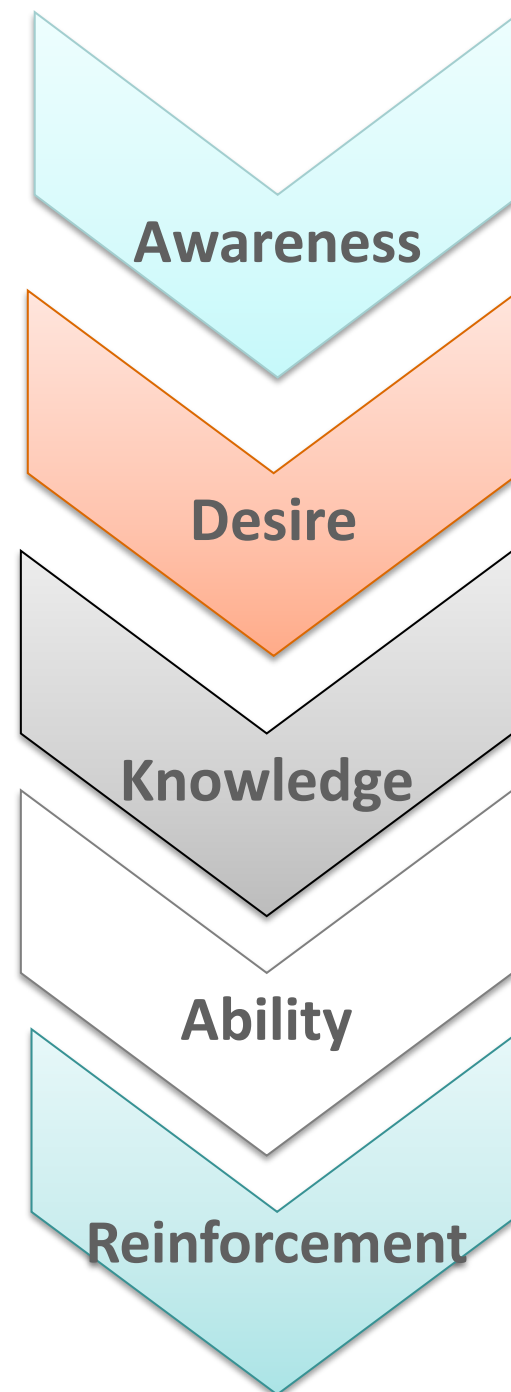
Success is achieved when reinforcements are:

1. Meaningful
2. Tied to actual accomplishments
3. Absence of negative consequences
4. Accountability



ACTIVITY: ADKAR – Model for Change

You have success at each change element when you hear...



• “I understand why...”

• “I have decided to...”

• “I know how to...”

• “I am able to...”

• “I will continue...”



Westview PCN's Change Management Story:

Creating Positive Change within your PCN



Introductions:

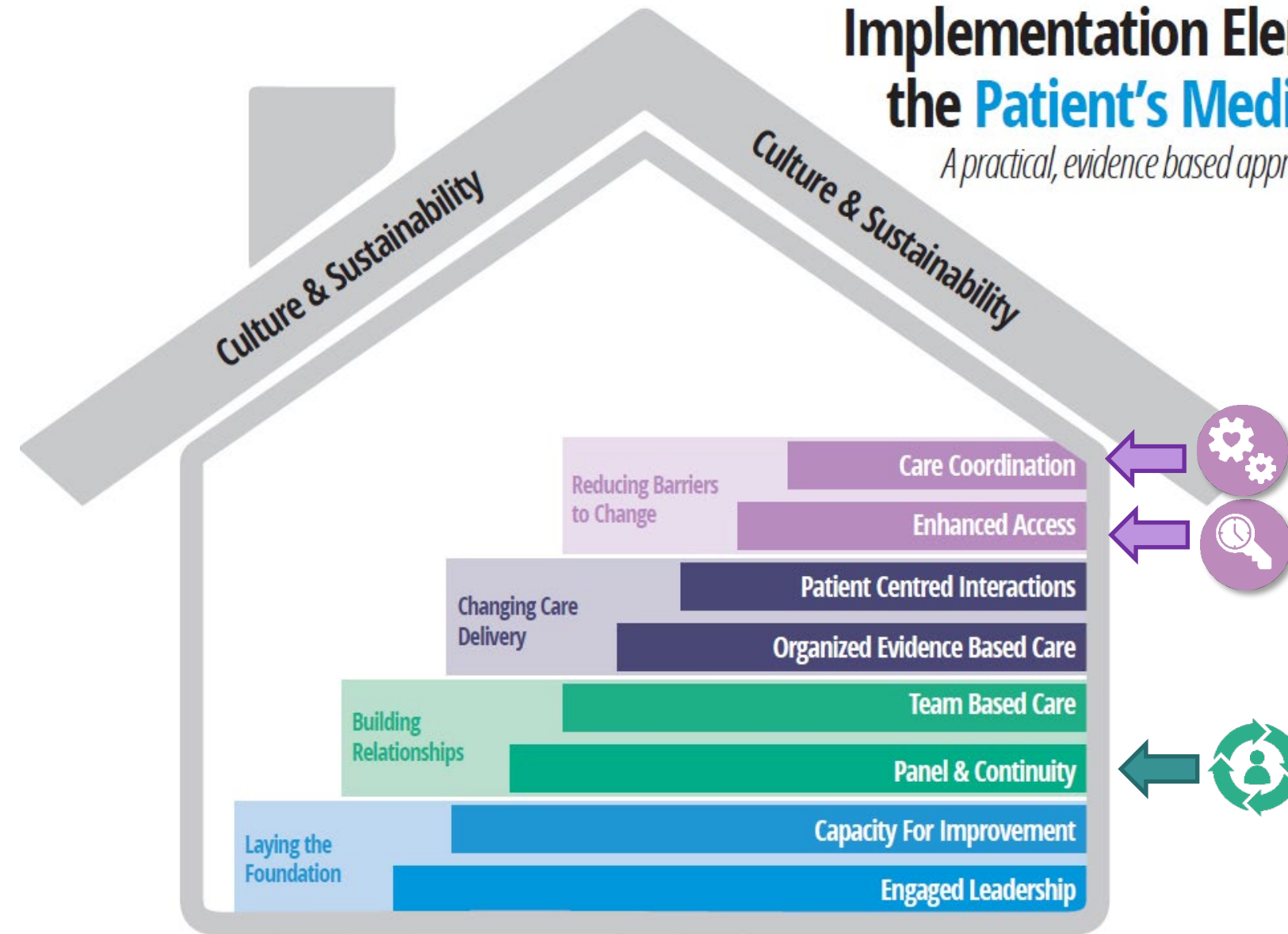
- Dr. Suzanne Squires, President-Board Chair, Westview PCN
- Dr. Carla Laidlaw, Medical Director Westview PCN
- Conflict of Interest: Both of us work for the Westview PCN



WHY CII/CPAR?

Implementation Elements for the Patient's Medical Home

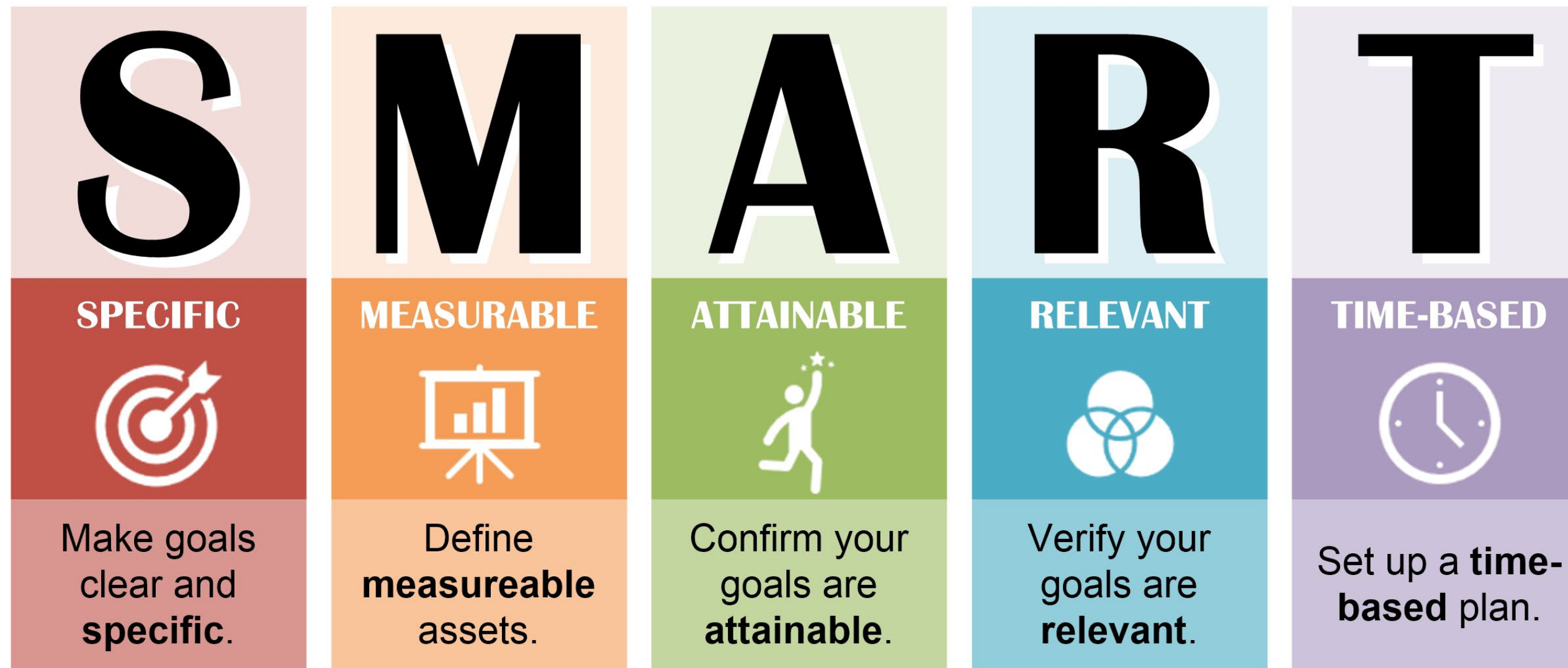
A practical, evidence based approach for clinic teams



- Clinic Enablers (Customized by Clinic)** | Practice Agreements | Human Resource Plan and Management | Financial Management | Electronic Medical Record | Legislated and Regulatory Compliance | Privacy and Information Sharing Practices | Office Efficiency Practices
- PCN Supports (Customized By PCN)** | Clinical Services | EMR/IT Supports | Measurement and Evaluation | Governance and Planning | Coordination and Integration with System Partners | Practice Transformation Services
- System Level Supports** | Integrated Information Systems | Provincial Support Programs | Supportive Payment Structures | Education and Workforce Development



It starts with a SMART GOAL



Westview PCN Change Management Story

The Westview PCN Board set a goal to have 75% of WVPCN clinics Confirmation of Participation signed for CII/CPAR by end of the 2020/21 Fiscal Year



Change:

Change is many things: difficult, unavoidable, uncomfortable. It's also the only way to grow and evolve - especially as the world around us changes. Physicians support patients in taking a structured approach to implementing change every day. We'll discuss how you can apply many of the same change principles in your PCN.



**I welcome change as long as
nothing is altered or different than
before**

- Author Unknown



Change Management Framework- ADKAR

A- Awareness of the need for change

D- Desire to support the change

K- Knowledge of how to change

A- Ability to demonstrate skills and behaviour

R- Reinforcement to make the change stick



Awareness of the Need for a Change

- The PCN Board was aware of the need for change to improved patient care and to meet expectations of Alberta Health
 - Our job was to make clinics aware of the need for change
 - Physicians asked for this
- Emphasized that CII/CPAR was designed at the request of Section of Family Physicians
- Highlighted Current Gaps in Transitions of Care

A

D

K

A

R



Desire to Support the Change

This step was the most challenging by far. When asked, most physicians and clinic managers agreed that CII/CPAR was a good idea, but they needed a push to get them to want to do it.

A
D
K
A
R



Photo by [Ashley Jurius](#) on [Unsplash](#)



Benefits of CII/CPAR

- Know who your patients are (and aren't)
 - Cleaner panels: better demographics, patients who have left your practice, deceased patients
 - Screen your patients for chronic disease/cancer – SAVE LIVES!
- Improved transitions of care:
 - Be notified when your patient is in the ER, admitted to/discharged from hospital and get day surgery
- Consult letters and primary care information on NETCARE!
 - Patients already think that this exists
- This is just the starting point- more services to come if doctors sign up



Knowledge of how to Change:

- Accelerating Change Transformation Team (ACTT at the AMA)
- Practice Facilitators
- Development of Physician Champions
- Make it as easy as possible for Clinics to Sign up!

A
D
K
A
R



Ability to Develop Skills and Behavior

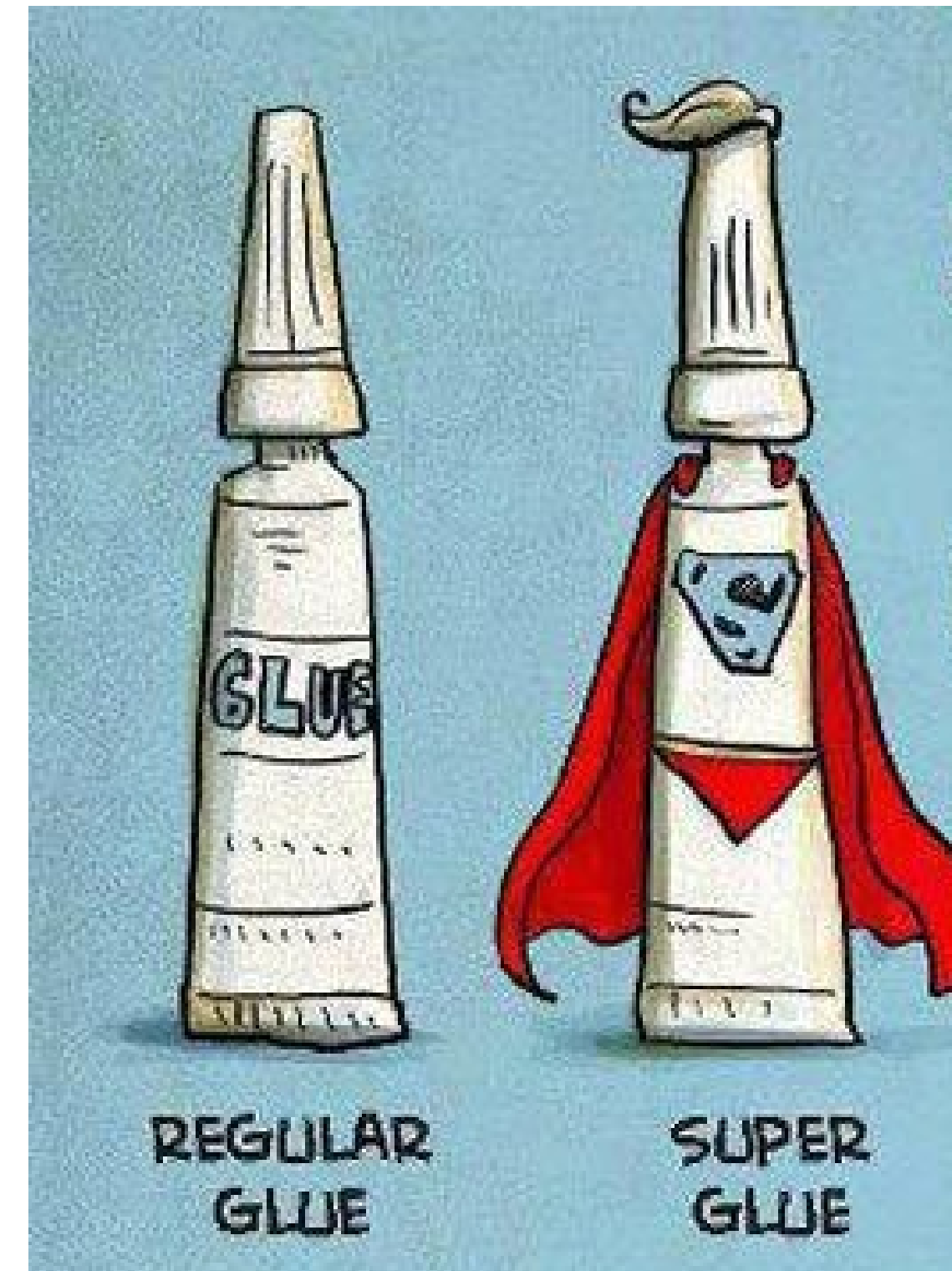
- Ability to be supported in developing clinic processes around all of the above
- **TEAM WORK IS ESSENTIAL:** Physicians, Clinic Managers, Clinic Teams and Practice Facilitators can work on this together.

A
D
K
A
R



Reinforcement to Make the Change Stick

- Reinforcement comes as we are using CII/CPAR actively and enjoying the **benefits**:
 - eNotifications (admit/discharge notifications)
 - Conflict/Demographic Reports
 - Consult Reports on Netcare
 - Community Encounter Digest on Netcare
- Making it the new standard of practice
 - the ‘new norm’



A
D
K
A
R

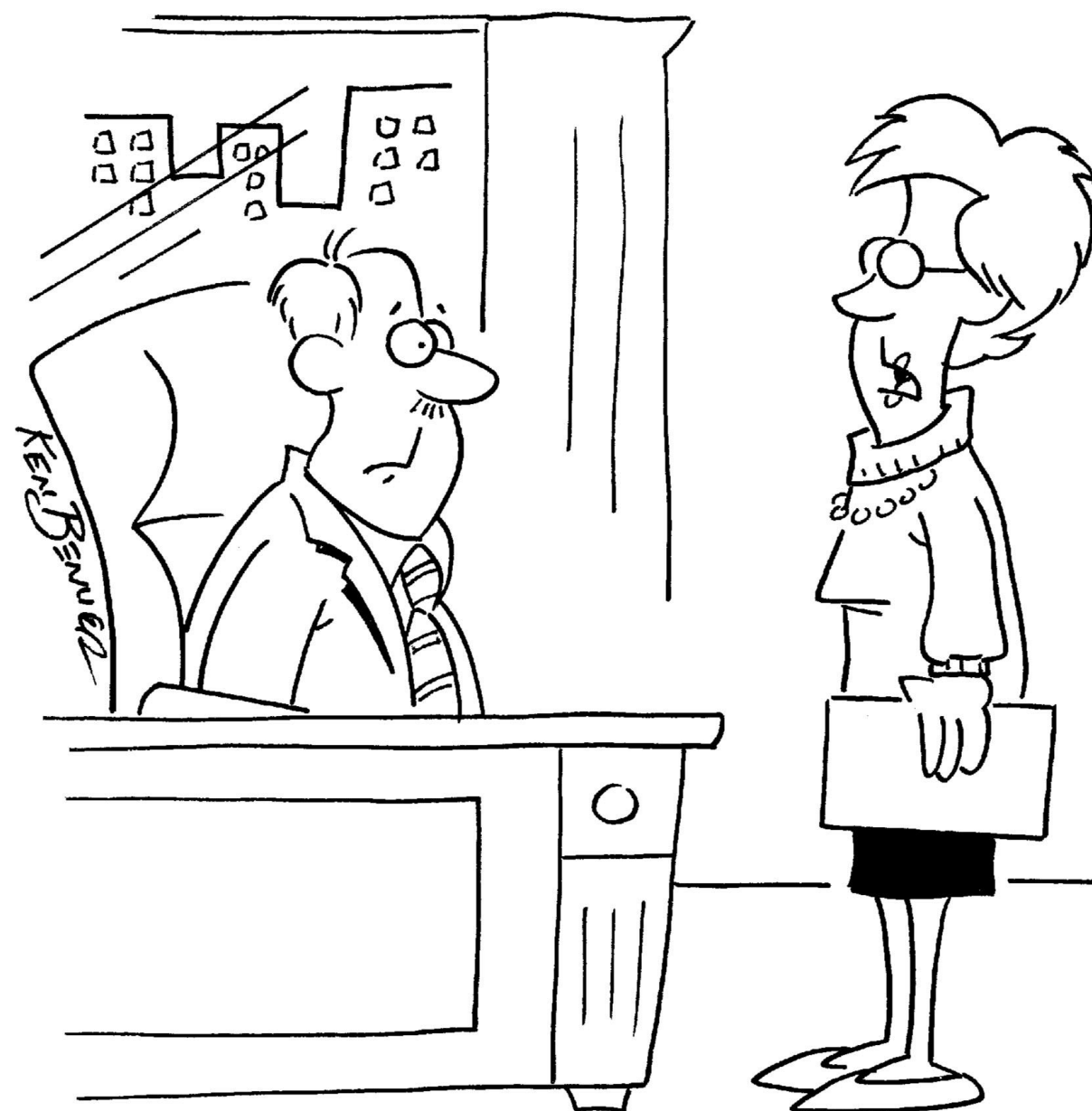


Westview PCN CII/CPAR implementation: Physician Champion Role

Salesperson and motivational Speaker

- Be knowledgeable about the change you are proposing
- Be prepared to address common concerns
- Be willing to “motivate” clinics as needed





“The motivational speaker you hired is going to be late. He’s having trouble getting out of bed.”

CartoonStock.com



Practice Facilitators and Physician Champions Make Great Team Members

- Often Physician Champions are aware of the need for change but unsure of how to make it happen- this is where a Practice Facilitator can be a great help
- Often Practice Facilitators have difficulty getting the changes into clinics- this is where your physician champion can relate to physicians and help bridge that gap



First Step is to Create a Team:

Westview PCN QI Team:

- Physician Champion = Salesperson/motivator
- Stephanie Balko= Practice Facilitator- Strategist/Consultant
- Anita Dalueg= Manager of Clinical Services - PCN CII/CPAR implementation and troubleshooting
- Marti Picket = Executive Director



Team Strategies to Employ

- Take the Easy Win
- Lead By Example
- Reach Out to Clinics
- Make it as Easy as possible
- Emphasize benefits/risks of no action
- Regular updates/Make it expected

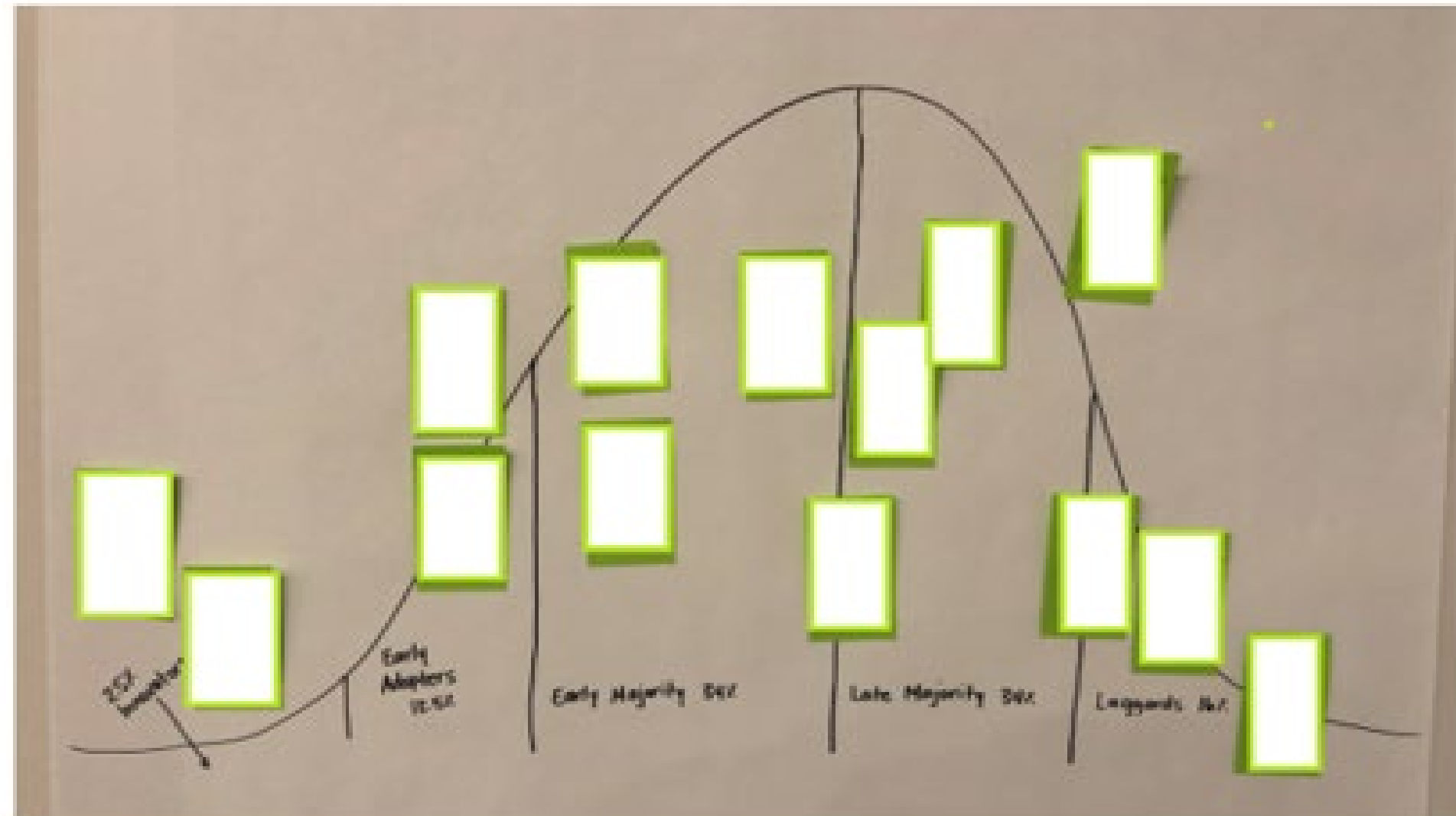


Take The Easy Win:

- Physicians and clinic managers engaged with the PCN
 - Attend meetings, on the board, do all needed reporting, etc
- Clinics who are already working on panel clean up
- Clinics who have an up to date PIA
- Clinics with physicians who work at hospitals
- Target Innovators and early adopters



Roger's Diffusion Curve



Innovators: -----16 physicians

Early Adopters: -----3 physicians

Early Majority: -----9 physicians

Late Majority: -----17 physicians

Laggards: -----4 physicians

*Focus efforts on Early Majority, and larger clinics.





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Take What You Can Get!

- Even one physician at a clinic is a success!
- Once the work for one physician at a clinic is done, it is easy to add more physicians
- The Early and Late Majority will be less reluctant to sign on once they see it is working and is easy



Image by [Siggy Nowak](#) from [Pixabay](#)



Lead By Example

- PCN Board Members need to sign up for CII/CPAR
- Be able to talk about the process and benefits
- Demonstrate that this is a PCN priority
 - Alberta Health and many PCNs are spending are dedicating resources CII/CPAR
- PHYSICIANS ASKED FOR THIS PROGRAM!
 - AMA Section of General Practice brought this forward to the Alberta Government at the request of family doctors
 - Millions of dollars spend by government as a result



Reach Out to Clinics

- We discovered that it was crucial to reach out to clinic directly
- Put together a presentation on CII/CPAR and gave it to every clinic (sometimes more than once for different people)
- Meet with both physicians and clinic managers separately or together
 - You never know who at a clinic who will be your champion (or barrier)
 - Crucial to involve clinic owners



Made Signing Up for CII/CPAR as Easy as Possible

- PCN staff not clinic staff to do most of the work of implementation of CII/CPAR
- Continued working with clinics after implementation to ensure they are able to use CII/CPAR data
- You don't have to do everything all at once



Regular Updates = Peer Pressure

- Announce successes- newsletter blog
 - EG: congratulations to clinic X for going live with CII/CPAR
- Adding CII/CPAR Quarterly Dashboard to the PCN Board meetings
- Make CII/CPAR part of the agenda for meetings- board and PCN wide
 - Number of clinics/physicians signed up



Jan 7, 2021

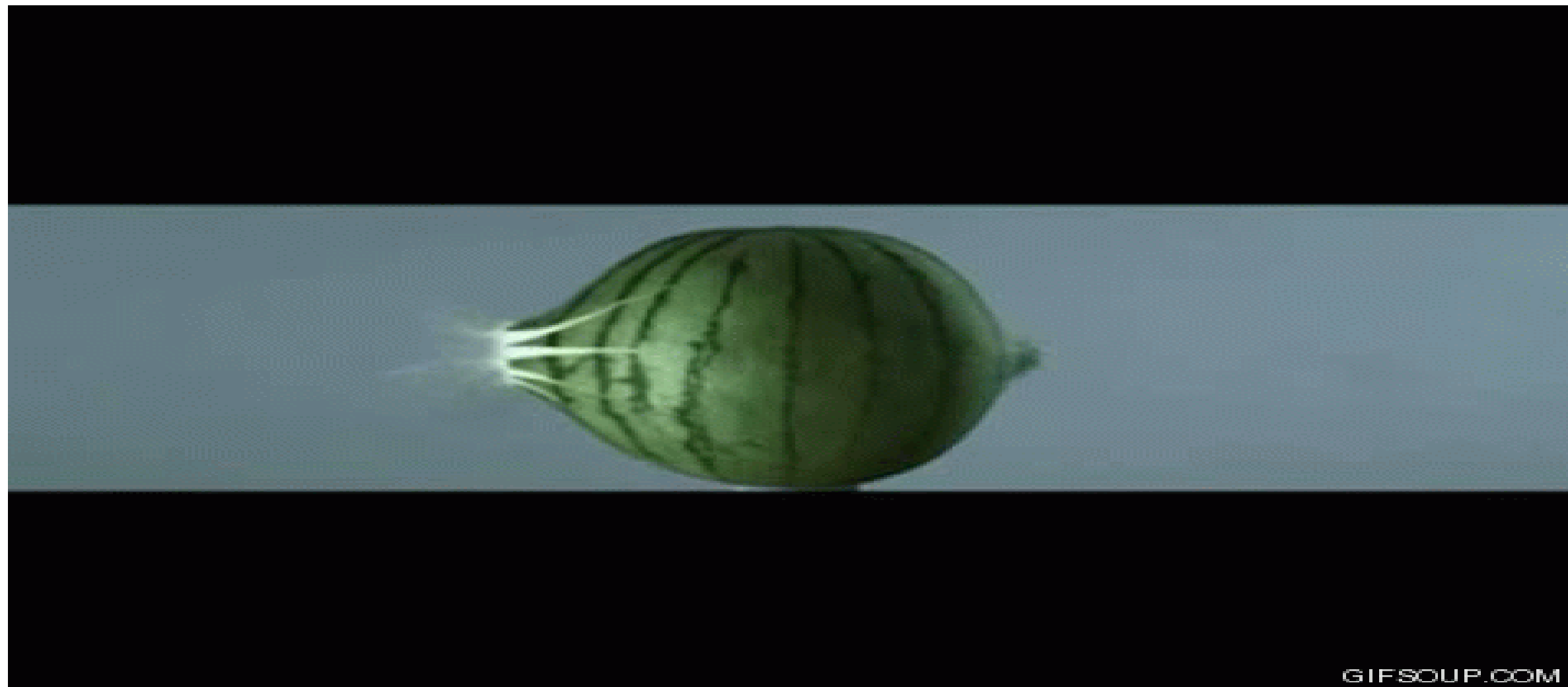
March 1, 2021

Clinic	EMR CII/CPAR Compatible	Clinic Engaging with PCN re CII/CPAR	Confirmation of Participation Signing In Progress	Confirmation of Participation completed	Live
A	✓	✓		✓	✓
B	✓	✓		✓	✓
C	✓	✓		✓	✓
D	✓	✓		✓	
E	✓	✓	✓		
F	✓	✓	✓		
G	✓	✓	✓		
H	✓	✓			
I	✓	✓			
J	✓	✓			
K	✓				
L	✓				
M	✓				
N	✓				
O					
% of Clinics	93%	67%	20%	27%	20%

Clinic	EMR CII/CPAR Compatible	Clinic Engaging with PCN re CII/CPAR	Commitment of Participation Signing In Progress	Commitment of Participation completed	Live
A	✓	✓		✓	✓
B	✓	✓		✓	✓
C	✓	✓		✓	✓
D	✓	✓		✓	✓
E	✓	✓		✓	
F	✓	✓		✓	
G	✓	✓		✓	
H	✓	✓		✓	
9	✓	✓		✓	
I	✓	✓		✓	
J	✓	✓		✓	
K	✓	✓	✓		
L	✓	✓	✓		
M	✓	✓			
N					
% of Clinics	93%	93%	13%	73%	27%

Legend	
	CII/CPAR LIVE!
	Signed Confirmation of Participation
	Confirmation of Participation signing in Progress
	Meeting with PCN re CII/CPAR
	not engaged yet with PCN re CII/CPAR
	EMR not CII/CPAR compatible

82% of clinics signed the commitment of participation by **April 1, 2021**
Currently 93% of Westview PCN Clinics are live on CII/CPAR



CRUSHED IT!



2022 PCN Strategic Forum

Change Management in Your PCN:

- Decide on your goal for Quality Improvement
- First Step in ADKAR is: **Awareness of a Need for Change**
- Our PCN started with the Awareness that Physicians need to know who are patients are and the need to close patient information loops e.g. when patients are in hospital



Photo by [Nathan Dumlao](#) on [Unsplash](#)



A BIG
thank
you




Q&A Panel with Westview PCN

Dr. Suzanne Squires
President-Board Chair

Dr. Carla Laidlaw
PCN Physician Champion,
Medical Director

Marti Pickett
Executive Director

Stephanie Balko
Practice Facilitator

Anita Dalueg
Manager of Clinical Services



Part 2 After Lunch



Prepare for the afternoon

What is the change your PCN wants to achieve?

Over lunch, think of a SMART Goal (with your team) for this afternoon.





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setting an audacious goal and crushing it

Part 2

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ACTT: Michelle Tobias-Pawl, Krystal Tom

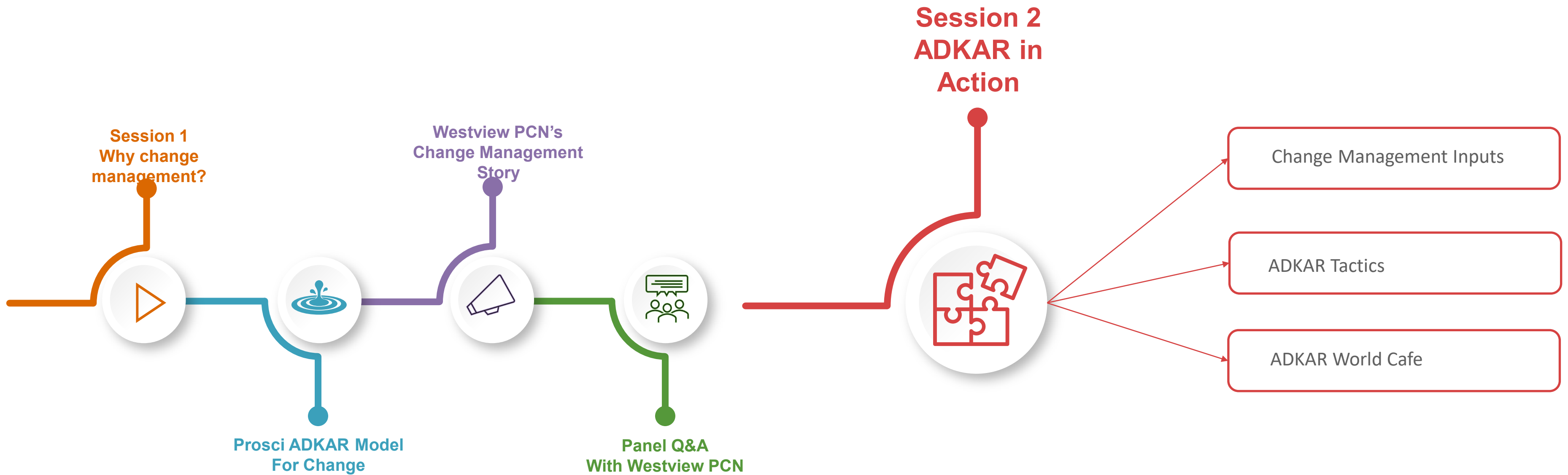
November 25, 2022



2022 PCN Strategic Forum



Welcome Back



Activity: SMART Goal

It's time to set your audacious goal!

Specific

Measurable

Attainable

Relevant

Time-based



Some is not a number, soon is not a time.
-Don Berwick -



Activity: Change Impact Assessment

It's time to understand the impact of your audacious goal on people.

Points to Ponder

- What aspects of a person's job is your change going to impact?
- What do you believe is important to the individual/group?
- What other key information do you need to consider?



Activity: ADKAR in ACTION



**Thank you for
attending!**

