JUNE 2019

PRACTICE FACILITATOR SELF-ASSESSMENT

WELCOME

Welcome to the Practice Facilitator Self-Assessment. This self-assessment is intended for individuals who are working in the role of Practice Facilitator (PF) in Alberta primary care practices. Please note this is a paper copy of an electronic survey.

The questions in this self-assessment are based on the *Practice Facilitator Competencies: Patient's Medical Home & Health Neighbourhood Transformation in Alberta*. This self-assessment is intended to provide an opportunity for each PF to self-reflect on their current competencies and to use the assessment results to guide a personal learning and development plan.

At the end of the assessment, you will be provided a summary of your results.

Aggregate results will be collated and reported at the provincial and zonal levels to inform training refinements and development.

The completion of this document is voluntary.

DISCLAIMER OF USE / PRIVACY STATEMENT

The data collected in this self-assessment is not anonymous. The collection of your name is necessary in order to demonstrate change in results over time. Only AMA evaluation and database consultants have access to individual data.

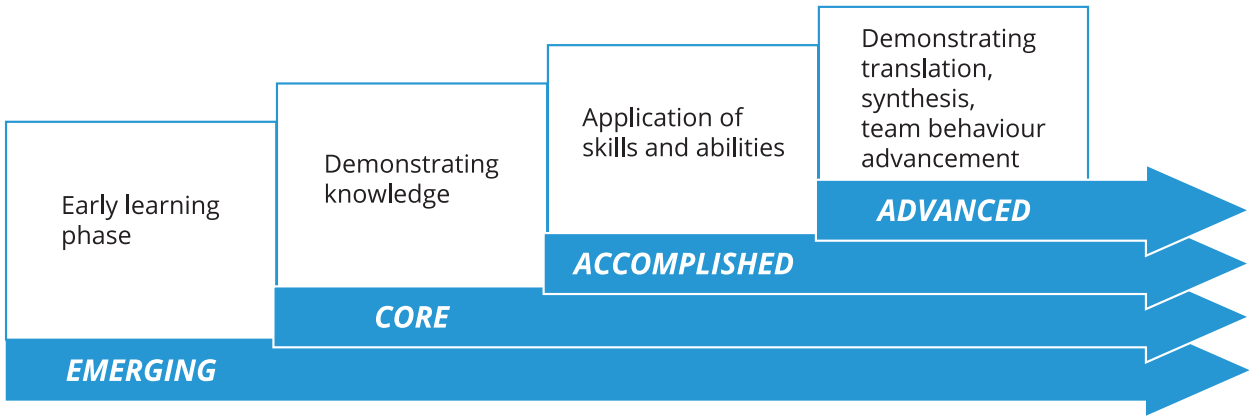
- ❑ Yes, I agree to provide my name to complete this self-assessment
- ❑ No, I do not agree to provide my name and will not complete this self-assessment

DEMOGRAPHICS & QUESTIONS

1. Name:
2. Email Address:
3. PCN (or other):
4. How many years of experience do you have working as a PF?
   - ○ Less than 1 year
   - ○ 1-2 years
   - ○ 2-5 years
   - ○ 5-10 years
   - ○ More than 10 years
5. What is your Full Time Equivalent in your role as a PF? (e.g., 1.0 = full time; 0.8 = 4 days per week)
6. Highest level of education completed
   - ○ Secondary school diploma
   - ○ College or technical school diploma/certificate
   - ○ Bachelor's degree
   - ○ Master's degree
   - ○ PhD degree
   - ○ Other professional degree _____
7. Have you attended AMA's 4-day (or 3-day) Practice Facilitator Training course?
   - ○ Yes
   - ○ No
8. Have you completed any of the Institute for Healthcare Improvement (IHI) Open School modules?
   - ○ Yes
   - ○ No
9. How often do you attend the provincial Improvement Facilitator Network monthly webinars?
   - ○ Never
   - ○ Rarely
   - ○ Sometimes
   - ○ Often
   - ○ Always

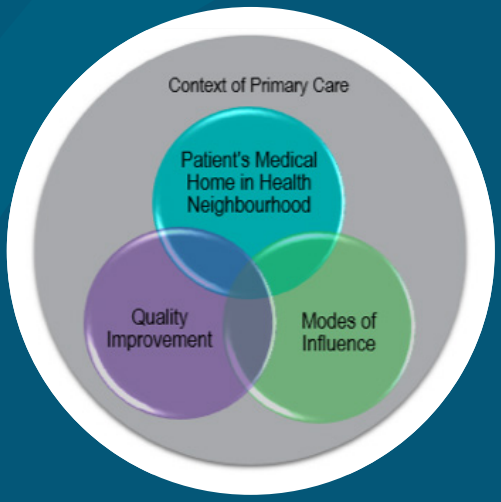
PF SELF-ASSESSMENT APPROACH

The questions in the self-assessment are in a maturity model format. Most questions have a response across 4 levels (emerging, core, accomplished, & advanced). The questions are built to capture increasing levels of complexity in the PF's work. In general, the levels reflect the following:



TIPS FOR COMPLETING THE SELF-ASSESSMENT

- ☐ Each question in the self-assessment should be answered in the context of the implementation of the Patient's Medical Home and Health Neighbourhood in Alberta.
- ☐ The questions are based on the document, *Practice Facilitator Competencies: Patient's Medical Home & Health Neighbourhood Transformation in Alberta*. You may use the competency document as a reference when completing the self-assessment.
- ☐ Several questions in the self-assessment refer to PCNs (Primary Care Networks) activities as the majority of PFs work for or directly with PCN member clinics. If you are a PF working outside of a PCN, seek where possible to answer the questions to the context of your own organization.
- ☐ Each question will start with a description of the knowledge, skills, and abilities of each key content area, followed by the assessment scale listed as a series of statements.
- ☐ Read each statement carefully and choose the level that best reflects your knowledge, skills, and abilities.
- ☐ If a statement contains more than one knowledge, skill, or ability, you want to be able to do both to select that statement.
- ☐ You may not understand what a question is asking, this is okay and is to be expected; select the option below it.
- ☐ It is not expected that all PFs will attain the highest level for each key competency area.
- ☐ In some cases, competencies may be distributed across other team members (i.e., the competency, or a part of it might be held by another PCN or clinic staff member)



PART 1 OF 4
COMPETENCY DOMAIN: CONTEXT OF PRIMARY CARE

Question 1:

Competency Key Content Area:

Primary Care System

PF Tasks:

- Explain to others the role and value of a strong primary care system within the broader health system context.
- Articulate to others the international and local evidence supporting the investment in primary care reform.

Pick the statement that best describes your knowledge, skills, and abilities of the above competency.

EMERGING	CORE	ACCOMPLISHED	ADVANCED
I have no clear idea of what the role of primary care is.	I have some idea of the role of primary care but am not able to clearly articulate it.	I am able to describe the features and benefits of high performing primary care systems.	I can articulate the international and local evidence supporting the investment in primary care reform and I can articulate how this evidence specifically supports the Alberta approach for healthcare system reform.

Question 2:

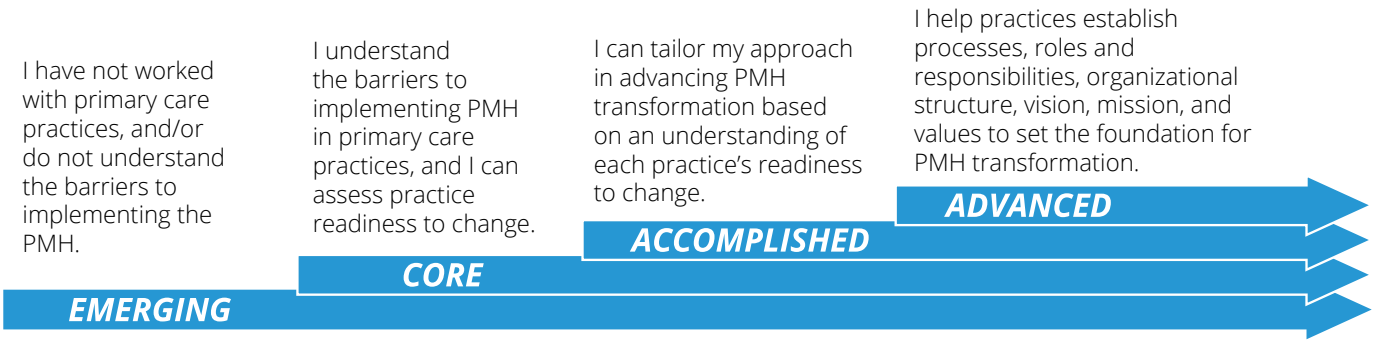
Competency Key Content Area:

Practice/Clinic Level

PF Tasks:

- Review the environment in each practice to assess their readiness for change.
- Facilitate practices to establish processes, roles and responsibilities, organizational structure, mission, vision, and values to set the foundation for PMH transformation.

Pick the statement that best describes your knowledge, skills, and abilities of the above competency.



Question 3:

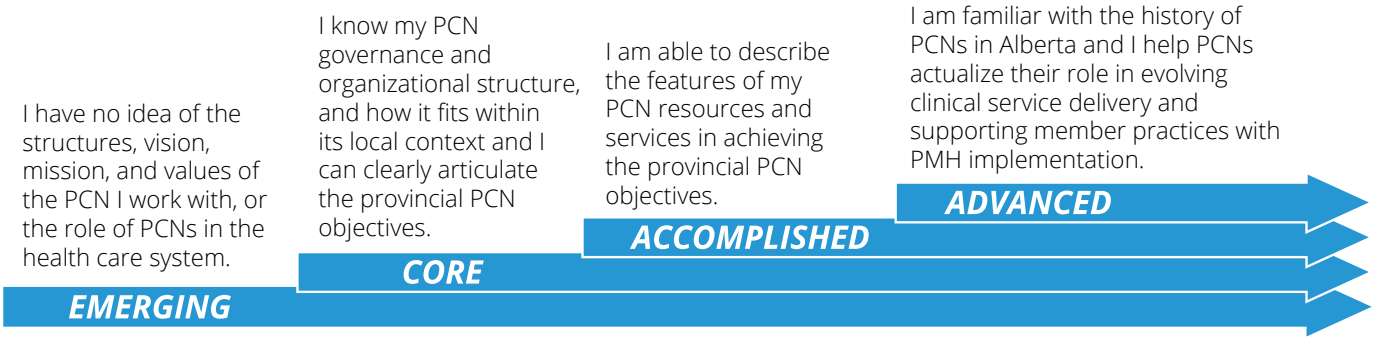
Competency Key Content Area:

Primary Care Network Level

PF Tasks:

- Articulate the provincial PCN objectives and the role of PCNs in health system transformation.
- Articulate PCN processes, roles and responsibilities, organizational structure, vision, mission, and values.

Pick the statement that best describes your knowledge, skills, and abilities of the above competency.



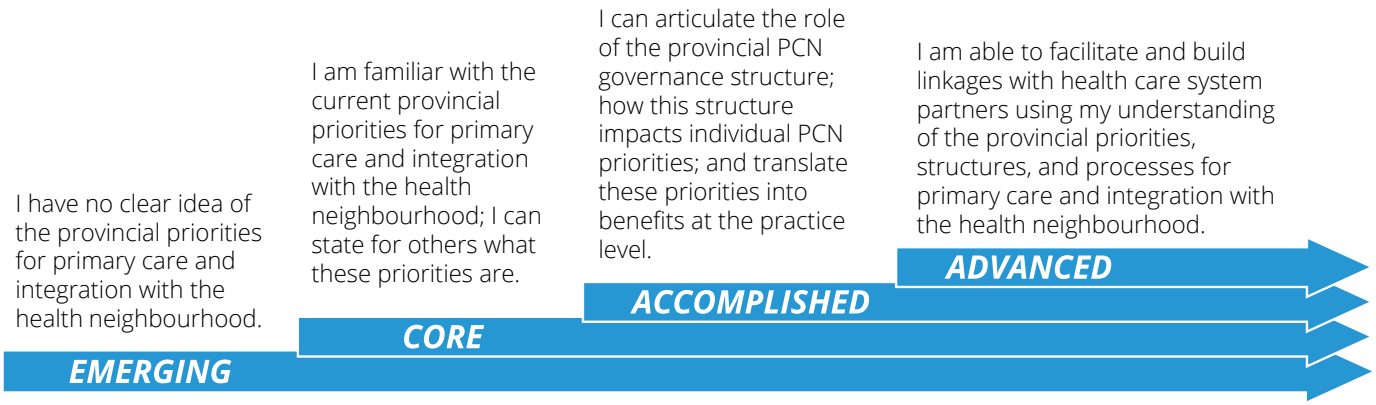
Question 4:

Competency Key Content Area: Provincial Level

PF Tasks:

- Describe provincial primary care and integration with the health neighbourhood priorities.
- Describe provincial structures and processes for primary care and integration with the health neighbourhood priorities (e.g., zone committees).
- Facilitate and build linkages with health care system partners.

Pick the statement that best describes your knowledge, skills, and abilities of the above competency.



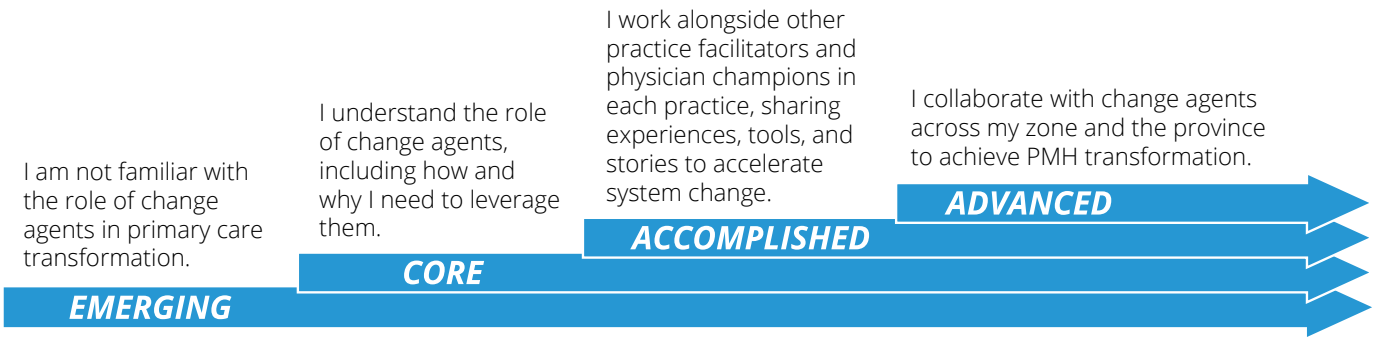
Question 5:

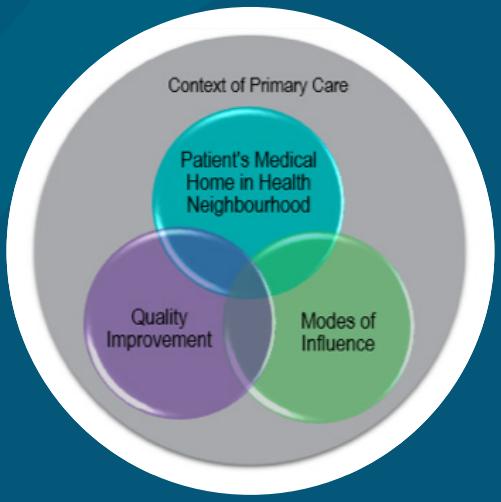
Competency Key Content Area: Change Agents

PF Tasks:

- Articulate the role of change agents in primary care transformation.
- Work with fellow change agents sharing experiences, tools, and stories to accelerate system change.
- Manage practice and PCN expectations of practice facilitator, and other change agent, role(s).

Pick the statement that best describes your knowledge, skills, and abilities of the above competency.





PART 2 OF 4 COMPETENCY DOMAIN: PATIENT'S MEDICAL HOME (PMH) AND INTEGRATION WITH THE HEALTH NEIGHBOURHOOD

Question 6:

Competency Key Content Area:

PMH Process Improvement

PF Tasks:

- Support practice teams in interpreting each of the Patient's Medical Home implementation elements.
- Support practice teams' understanding of how each of the elements builds on one another and are interdependent.
- Operate as a PMH, change, and QI content resource for practice teams, and support the knowledge transfer to practices, PCNs, AHS (integration with the health neighbourhood), and peers.

Pick the statement that best describes your knowledge, skills, and abilities of the above competency.

EMERGING	CORE	ACCOMPLISHED	ADVANCED
I have not heard of the PMH implementation elements, nor have I implemented any of the elements with primary care practice teams.	I have basic knowledge of each implementation element, how they build on one another, and how they are interdependent.	I have experience implementing one or more PMH elements with a practice team and I help teams understand the implementation elements, how they build on one another, and how they are interdependent.	I help teams re-imagine their care model to reflect the PMH vision.

Question 7:

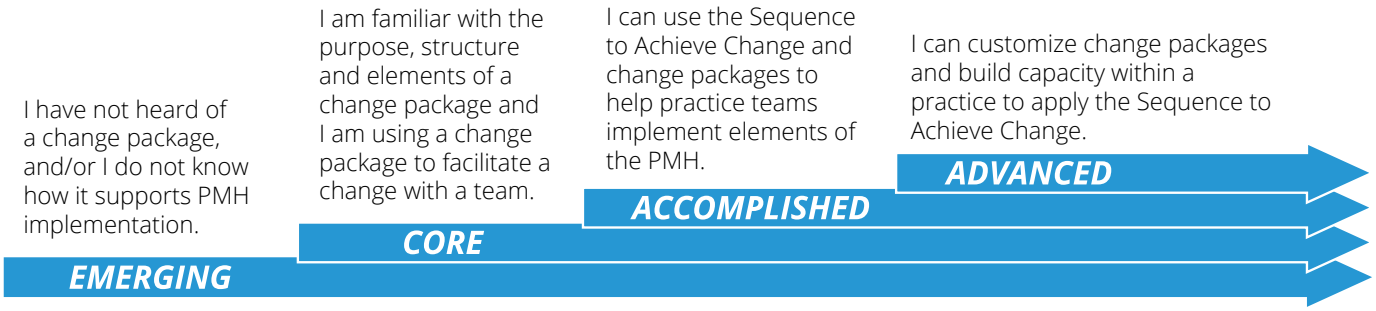
Competency Key Content Area:

Change Package Adoption and Implementation

PF Tasks:

- Propose specific change packages to achieve practice (clinic) goals to advance PMH.
- Apply the Sequence to Achieve Change to implement potentially better practices defined in the appropriate change package.
- Support practice teams with the customization of potentially better practices in the change package to fit the clinic context.
- Utilize appropriate tools to support practice change and sustainability.

Pick the statement that best describes your knowledge, skills, and abilities of the above competency.



Question 8 & 9:

Competency Key Content Area:

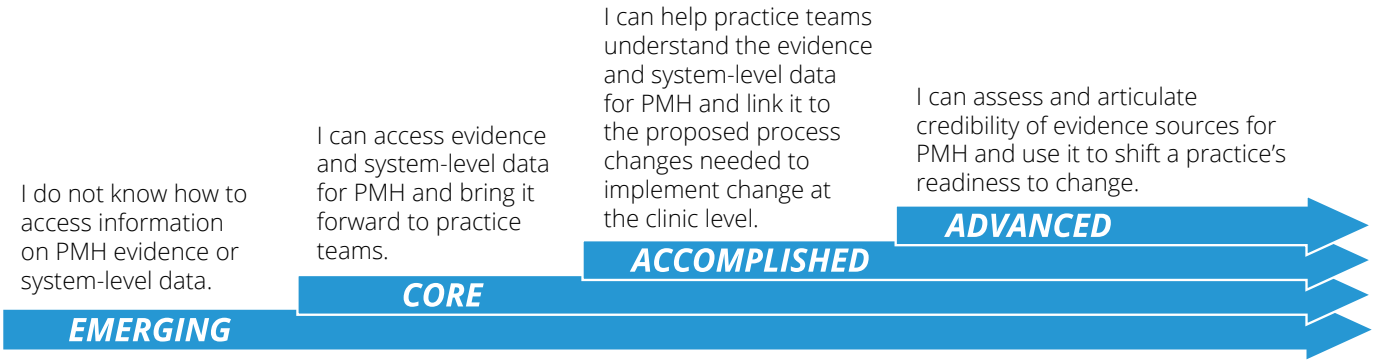
PMH Evidence, System-Level Data, Policy, & Legislation Appraisal

PF Tasks:

- Identify and bring forward to practice teams the sources of evidence for PMH and the proposed process changes needed to influence and implement change at the clinic level.
- Interpret and translate data on system performance (e.g., panel progress) related to PMH to practice teams.
- Source evidence and guidelines for practice teams (e.g. legislation, standards of practice, and policies) relevant to the PMH changes they are making.

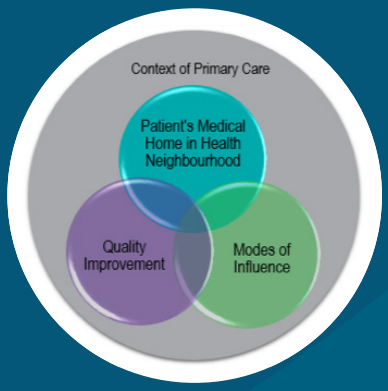
Pick the statement that best describes your knowledge, skills, and abilities of the above competency.

PMH Evidence Appraisal



System-Level Data, Policy, & Legislation Appraisal

PART 3 OF 4
COMPETENCY DOMAIN: QUALITY IMPROVEMENT



Question 10 & 11:

Competency Key Content Area:

Data & Measurement

PF Tasks:

- Recommend sources of quality improvement data for the practice to help them identify problems, or areas for improvement; help teams acquire, interpret, and apply these data sources.
- Help teams to generate, interpret, and analyze practice level data (qualitative and quantitative) to measure baseline and improvement.
- Identify with practice teams the process, outcome, and balancing measures for their improvement projects.

Pick the statement that best describes your knowledge, skills, and abilities of the above competency.

Practice-level data and measures

EMERGING	CORE	ACCOMPLISHED	ADVANCED
I am not familiar with how to design measurement and data collection processes in primary care practices.	I can create, or access expertise in developing, common reporting metrics from the EMR with practice teams.	I can help teams identify and create process, outcome, and balancing measures for their improvement projects. I can help teams to generate, interpret, and analyze practice-level data (qualitative and quantitative) to measure baseline and improvement.	The teams I support have the internal capacity to use practice-level data and measurement to drive high quality decision making and improvements.

Health Quality Council of Alberta as an external data source

EMERGING	CORE	ACCOMPLISHED	ADVANCED
I am not familiar with how to access information on external data sources to help practices identify problems or areas for improvement.	I can help teams obtain HQCA Primary Healthcare Panel Reports.	I can interpret HQCA Primary Healthcare Panel Reports to engage with and inform practice teams about areas of focus for improvements.	I coach teams to make decisions about using data from the HQCA Primary Healthcare Panel Reports.

Question 12:

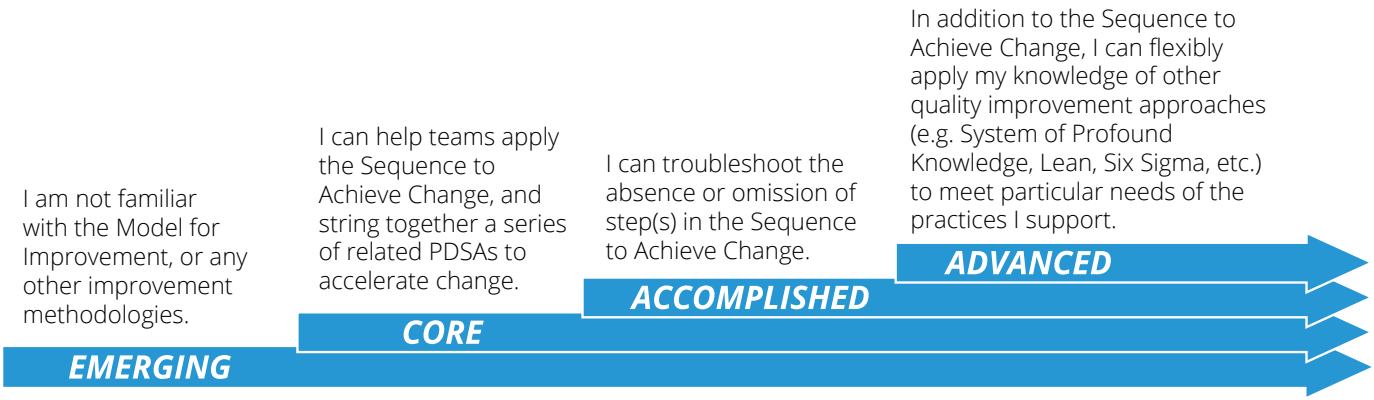
Competency Key Content Area:

QI Approaches & Tools

PF Tasks:

- Select among QI methods, processes, and tools for each practice team.
- Support practices in using the Model for Improvement as their framework for making changes.
- Leverage plan-do-study-act (PDSA) cycles with practice teams for iterative learning and scaling up improvements at the clinic level.
- Support teams to apply the Sequence to Achieve Change to each improvement project.

Pick the statement that best describes your knowledge, skills, and abilities of the above competency.



Question 13:

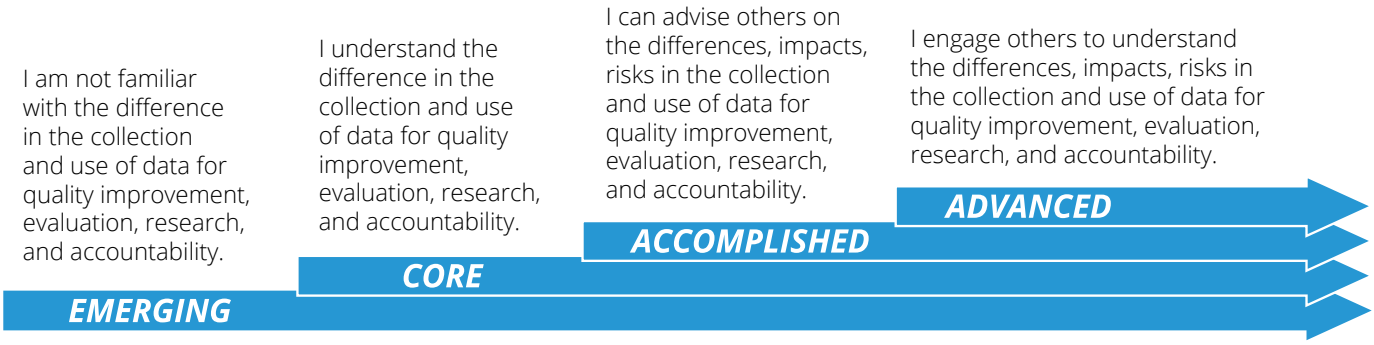
Competency Key Content Area:

Data Sources & Use

PF Tasks:

- Articulate to appropriate audiences the difference of sourcing and using data for quality improvement, evaluation, research, and accountability.

Pick the statement that best describes your knowledge, skills, and abilities of the above competency.



Question 14 & 15:

Competency Key Content Area:

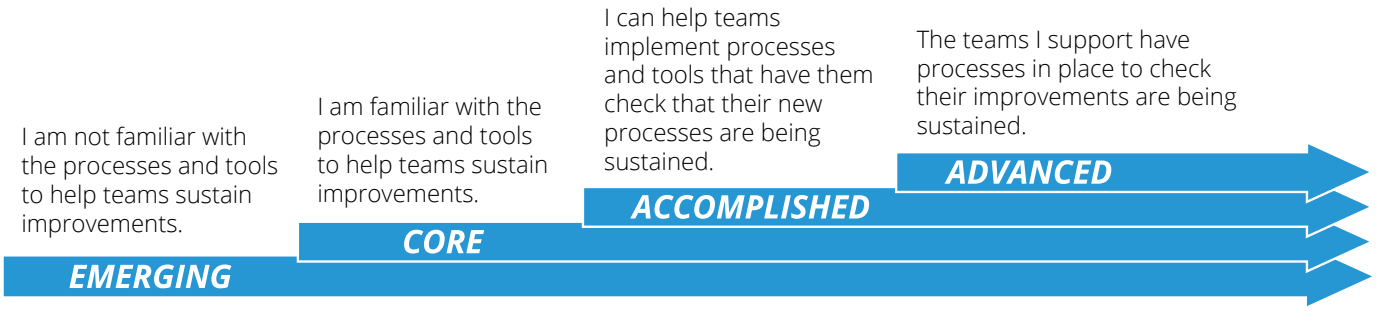
Sustain, Spread & Scale Principles

PF Tasks:

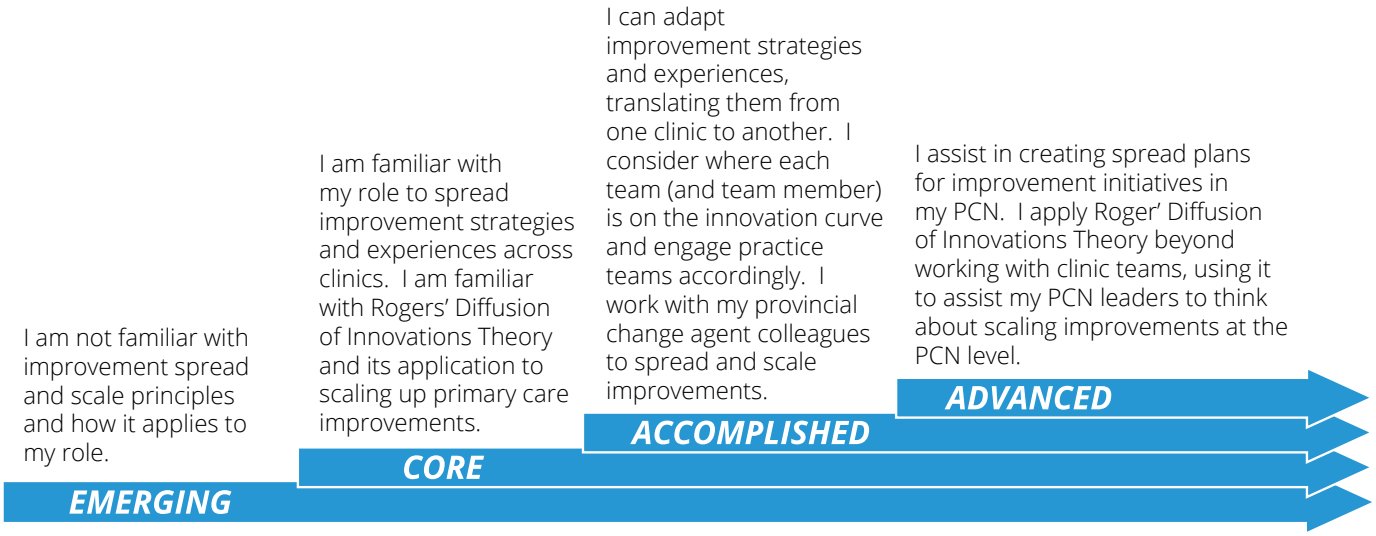
- Help teams implement processes and tools that have them check that their new processes are being sustained.
- Design opportunities to spread successful improvements and lessons learned within and between practices.
- Apply principles from research on making changes to scale at the provincial, clinic, and PCN levels.
- Leverage other change agents to spread ideas across PCN, Zone, and province.

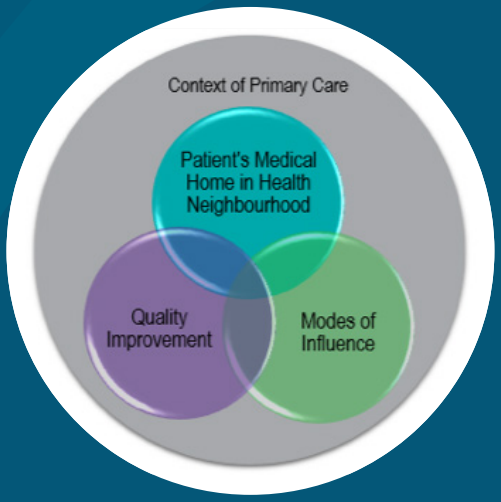
Pick the statement that best describes your knowledge, skills, and abilities of the above competency.

Sustain



Spread & Scale





PART 4 OF 4 COMPETENCY DOMAIN: MODES OF INFLUENCE

Question 16:

Competency Key Content Area:

Engagement

PF Tasks:

- Support the development of engaged practice leaders (formal and informal) by building awareness, desire, and knowledge for PMH and the Health Neighbourhood implementation.
- Help clinic leaders to engage other team members in the change process.
- Address leadership and team barriers to change.

Pick the statement that best describes your knowledge, skills, and abilities of the above competency.

EMERGING	CORE	ACCOMPLISHED	ADVANCED
I am not confident to approach practice leaders and teams about changes toward PMH transformation.	I can use basic engagement tools (e.g., features and benefits, value propositions) to engage practice leaders and team members with change ideas toward PMH implementation.	I incorporate advanced tools and techniques (e.g., motivational interviewing) into my engagements with practice teams.	I can leverage others to increase engagement across the practice and PCN.

Question 17:

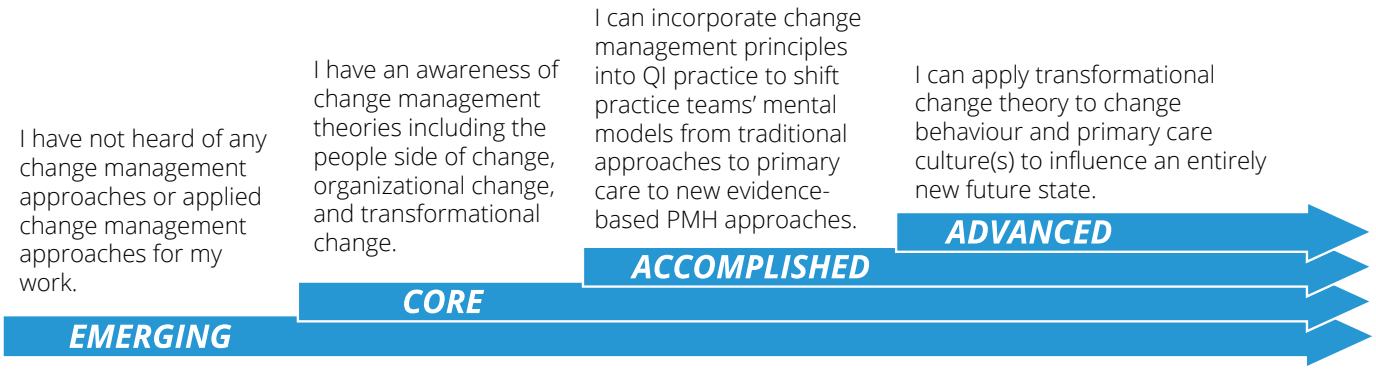
Competency Key Content Area:

Change Management

PF Tasks:

- Support teams to incorporate change management principles into QI practice.
- Shift practice teams' mental models from the traditional approach to primary care to evidence-based PMH approaches.
- Work with change agent peers to implement new PMH innovation, working within and beyond practices.

Pick the statement that best describes your knowledge, skills, and abilities of the above competency.



Question 18:

Competency Key Content Area:

Project Management

PF Tasks:

- Apply basic project management tools and resources to manage own activities.
- Build capacity within each practice team to project manage their own work.

Pick the statement that best describes your knowledge, skills, and abilities of the above competency.

Question 19:

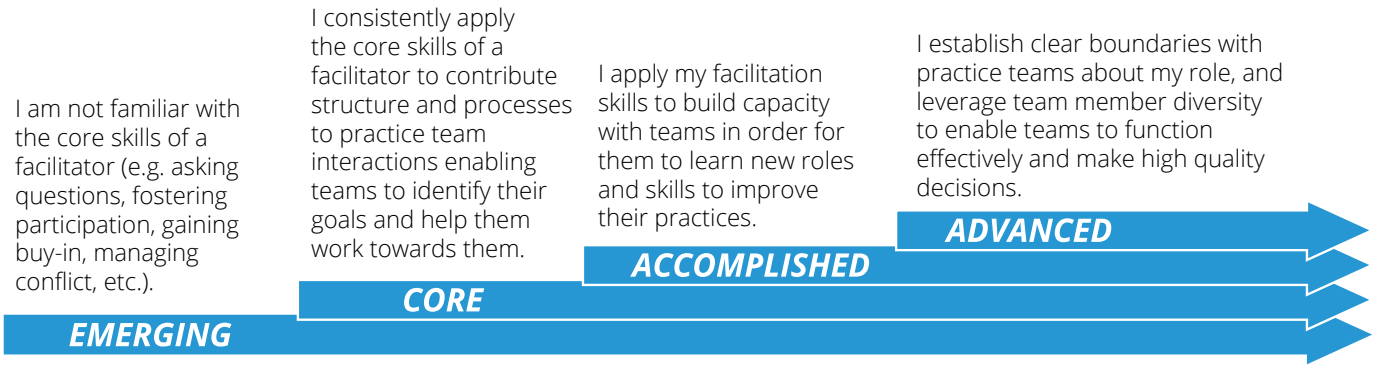
Competency Key Content Area:

Facilitation

PF Tasks:

- Identify the practice team's goal(s) and help them work toward it/them.
- Contribute structure and processes to practice team interactions to enable them to function effectively and make high quality decisions.
- Apply facilitator core practices and process tools when working with teams to help them achieve their goals.
- Leverage team member diversity (skills, personalities etc.) to achieve practice goals for PMH.
- Use interpersonal and communication skills to establish and maintain relationships with practices.

Pick the statement that best describes your knowledge, skills, and abilities of the above competency.



Question 20:

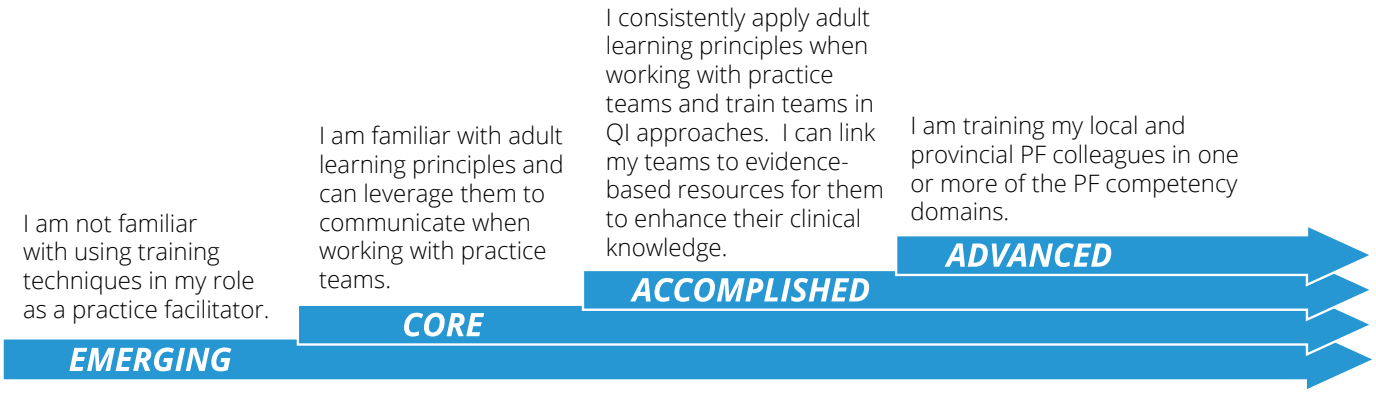
Competency Key Content Area:

Training

PF Tasks:

- Apply adult learning principles to teach practice team members content (e.g., PMH theory) and new clinical processes.
- Link practices to clinical content as it relates to their practice and improvement project(s). E.g., Clinical Practice Guidelines.

Pick the statement that best describes your knowledge, skills, and abilities of the above competency.



Question 21:

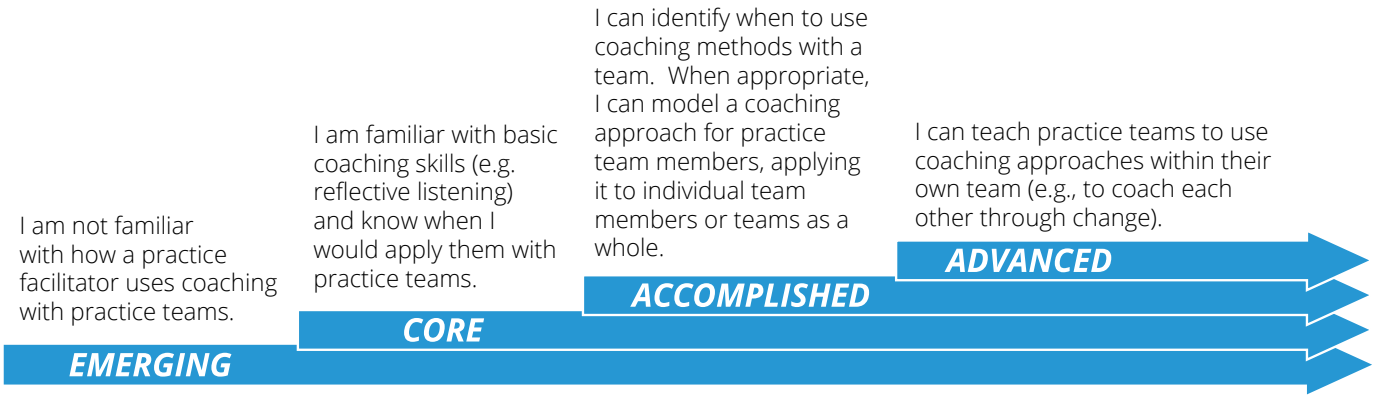
Competency Key Content Area:

Coaching

PF Tasks:

- Facilitate the practice team to use their own content and process expertise to solve problems and make progress on their improvement goals.
- Provide relevant assessment and constructive performance feedback to practices.

Pick the statement that best describes your knowledge, skills, and abilities of the above competency.



Question 22:

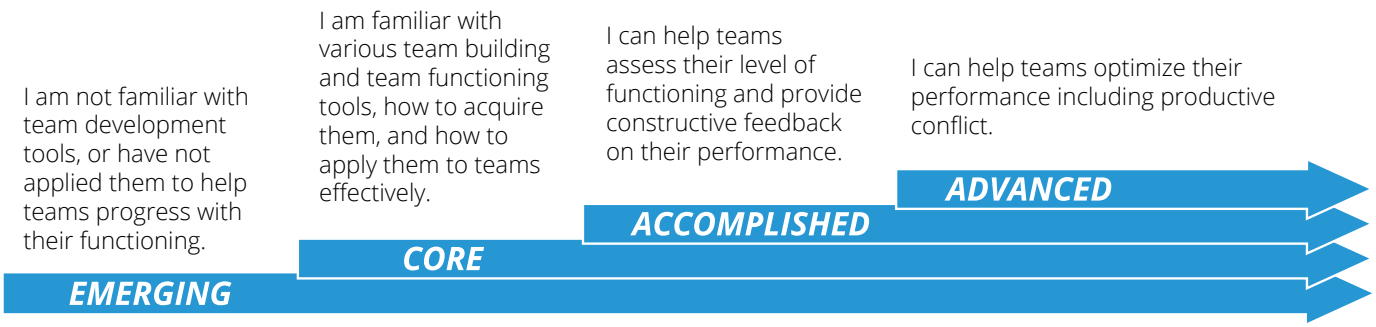
Competency Key Content Area:

Team Dynamics/ Team Functioning

PF Tasks:

- Help teams to assess their level of team functioning as it relates to their ability to implement new processes for PMH.
- Select and apply team development tools to help teams progress with their functioning.
- Help teams to manage their conflict toward a state of healthy conflict.

Pick the statement that best describes your knowledge, skills, and abilities of the above competency.



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