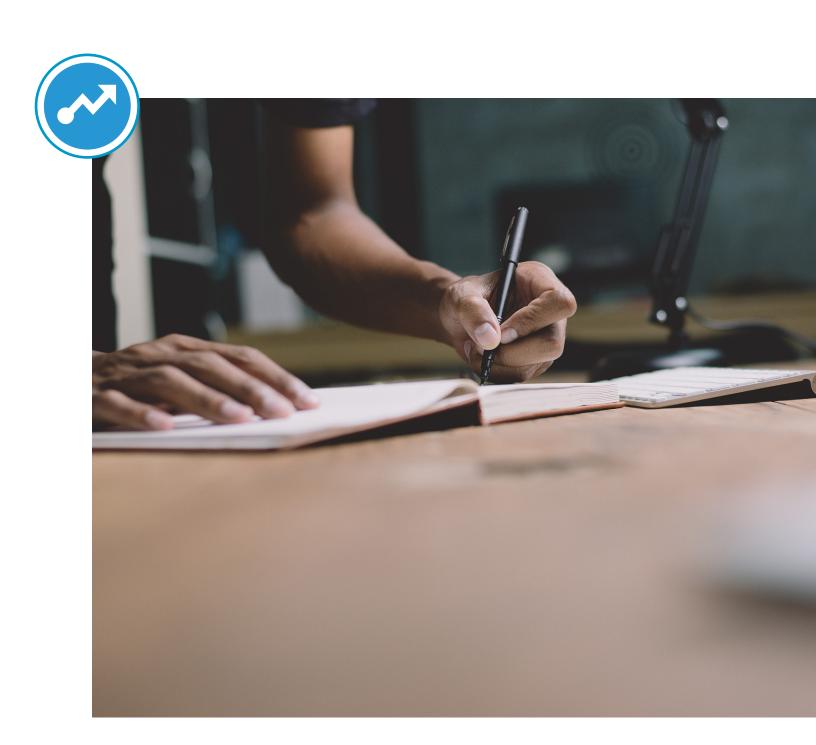
PRACTICE FACILITATOR SELF-ASSESSMENT



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.

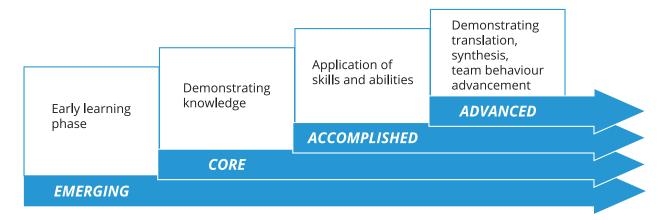
- Yes, I agree to provide my name to complete this self-assessment
- No, I do not agree to provide my name and will not complete this self-assessment

DEMOGRAPHICS & QUESTIONS

1.	Name:		
2.	Email Address:		
3.	PCN (or other):		
4.	How many years of experience do you have working as a PF?		
	0	Less than 1 year	
	0	1-2 years	
	0	2-5 years	
	0	5-10 years	
	0	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 we		
6.	Hig	hest level of education completed	
	0	Secondary school diploma	
	0	College or technical school diploma/certificate	
	0	Bachelor's degree	
	0	Master's degree	
	0	PhD degree	
	0	Other professional degree	
7.	Have you attended AMA's 4-day (or 3-day) Practice Facilitator Training course?		
	0	Yes	
	0	No	
8.	Have you completed any of the Institute for Healthcare Improvement (IHI) Open School modules?		
	0	Yes	
	0	No	
9.	Hov	How often do you attend the provincial Improvement Facilitator Network monthly webinars?	
	0	Never	
	0	Rarely	
	0	Sometimes	
	0	Often	
	0	Always	

PF SELF-ASSESSMENT APPROACH

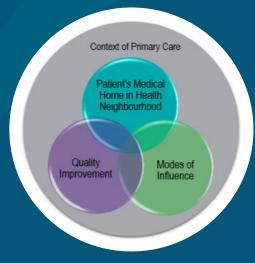
The questions in the self-assessment are in a maturity model format. Most questions have a response across 4 levels (emerging, core, accomplished, & advanced). The questions are built to capture increasing levels of complexity in the PF's work. In general, the levels reflect the following:



TIPS FOR COMPLETING THE SELF-ASSESSMENT

when 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
- 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:

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.

Key Content Area:

Competency

Primary Care System

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.

care systems.

ACCOMPLISHED

I am able to describe

performing primary

the features and

benefits of high

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.

ADVANCED

EMERGING CORE

Question 2:

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.

Competency Key Content Area:

Practice/Clinic Level

I have not worked with primary care practices, and/or do not understand the barriers to implementing the PMH.

I understand the barriers to implementing PMH in primary care practices, and I can assess practice readiness to change. I can tailor my approach in advancing PMH transformation based on an understanding of each practice's readiness to change.

ACCOMPLISHED

I help practices establish processes, roles and responsibilities, organizational structure, vision, mission, and values to set the foundation for PMH transformation.

ADVANCED

CORE

EMERGING

Question 3:

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.

I have no idea of the structures, vision, mission, and values of the PCN I work with, or the role of PCNs in the health care system. I know my PCN governance and organizational structure, and how it fits within its local context and I can clearly articulate the provincial PCN objectives.

I am able to describe the features of my PCN resources and services in achieving the provincial PCN objectives.

ACCOMPLISHED

Competency Key Content Area:

Primary Care Network Level

CORE

I am familiar with the history of PCNs in Alberta and I help PCNs actualize their role in evolving clinical service delivery and supporting member practices with PMH implementation.

ADVANCED

Question 4:

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.

I have no clear idea of the provincial priorities for primary care and integration with the health neighbourhood. I am familiar with the current provincial priorities for primary care and integration with the health neighbourhood; I can state for others what these priorities are.

I can articulate the role of the provincial PCN governance structure; how this structure impacts individual PCN priorities; and translate these priorities into benefits at the practice level.

ACCOMPLISHED

I am able to facilitate and build linkages with health care system partners using my understanding of the provincial priorities, structures, and processes for primary care and integration with the health neighbourhood.

ADVANCED

CORE

EMERGING

Question 5:

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.

I am not familiar with the role of change agents in primary care transformation.

EMERGING

I understand the role of change agents, including how and why I need to leverage them.

CORE

I work alongside other practice facilitators and physician champions in each practice, sharing experiences, tools, and stories to accelerate system change.

ACCOMPLISHED

Competency **Key Content** Area:

Competency

Key Content Area:

> Provincial Level

Change Agents

ADVANCED

I collaborate with change agents

across my zone and the province

to achieve PMH transformation.

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



Question 6:

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.

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.

ACCOMPLISHED

Competency Key Content Area:

PMH Process Improvement

I help teams re-imagine their care model to reflect the PMH vision.

ADVANCED

EMERGING CORE

Question 7:

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.

I have not heard of a change package, and/or I do not know how it supports PMH implementation.

EMERGING

I am familiar with the purpose, structure and elements of a change package and I am using a change package to facilitate a change with a team.

I can use the Sequence to Achieve Change and change packages to help practice teams implement elements of the PMH.

ACCOMPLISHED

Competency **Key Content** Area:

Change Package Adoption and Implementation

CORE

I can customize change packages and build capacity within a practice to apply the Sequence to Achieve Change.

ADVANCED

Question 8 & 9:

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

I do not know how to access information on PMH evidence or system-level data.

EMERGING

I can access evidence and system-level data for PMH and bring it forward to practice teams.

CORE

I can help practice teams understand the evidence and system-level data for PMH and link it to the proposed process changes needed to implement change at the clinic level.

ACCOMPLISHED

Competency Key Content Area:

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

I can assess and articulate credibility of evidence sources for PMH and use it to shift a practice's readiness to change.

ADVANCED

System-Level Data, Policy, & Legislation Appraisal

I am not familiar with how to find information on legislation, standards of practice, or policies relevant to PMH changes. I know where to access information on standards of practice for clinic team members and seek out advice on how PMH practice changes are interdependent with these standards.

CORE

I am gaining confidence in identifying barriers present in legislation, standards of practice, and policies that may impact the practice team's progress with implementing PMH.

ACCOMPLISHED

I am confident that practice teams I work with can identify barriers in legislation, standards of practice, or policies related to PMH and, I can manage any resistance that arises (with assistance from others) as appropriate.

ADVANCED

PART 3 OF 4 COMPETENCY DOMAIN: QUALITY IMPROVEMENT



Question 10 & 11:

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.

Competency Key Content Area:

Data & Measurement

- 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

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.

ACCOMPLISHED

internal capacity to use practicelevel data and measurement to drive high quality decision making and improvements.

The teams I support have the

ADVANCED

CORE

EMERGING

Health Quality Council of Alberta as an external data source

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.

ACCOMPLISHED

I coach teams to make decisions about using data from the HQCA Primary Healthcare Panel Reports.

ADVANCED

CORE

Question 12:

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.

I am not familiar with the Model for Improvement, or any other improvement methodologies.

EMERGING

I can help teams apply the Sequence to Achieve Change, and string together a series of related PDSAs to accelerate change.

CORE

I can troubleshoot the absence or omission of step(s) in the Sequence to Achieve Change.

ACCOMPLISHED

Competency Key Content Area:

QI Approaches & Tools

In addition to the Sequence to Achieve Change, I can flexibly apply my knowledge of other quality improvement approaches (e.g. System of Profound Knowledge, Lean, Six Sigma, etc.) to meet particular needs of the practices I support.

ADVANCED

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 13:

I am not familiar with the difference in the collection and use of data for quality improvement, evaluation, research, and accountability. I understand the difference in the collection and use of data for quality improvement, evaluation, research, and accountability.

CORE

I can advise others on the differences, impacts, risks in the collection and use of data for quality improvement, evaluation, research, and accountability.

ACCOMPLISHED

Competency Key Content Area:

Data Sources & Use

I engage others to understand the differences, impacts, risks in the collection and use of data for quality improvement, evaluation, research, and accountability.

ADVANCED

Question 14 & 15:

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

I am not familiar with the processes and tools to help teams sustain improvements. I am familiar with the processes and tools to help teams sustain improvements.

CORE

I can help teams implement processes and tools that have them check that their new processes are being sustained.

ACCOMPLISHED

Competency Key Content Area:

Sustain, Spread & Scale Principles

t processes
that have them their new are being sustained.

The teams I support have processes in place to check their improvements are being sustained.

ADVANCED

EMERGING

Spread & Scale

I am not familiar with improvement spread and scale principles and how it applies to my role.

EMERGING

I am familiar with my role to spread improvement strategies and experiences across clinics. I am familiar with Rogers' Diffusion of Innovations Theory and its application to scaling up primary care improvements.

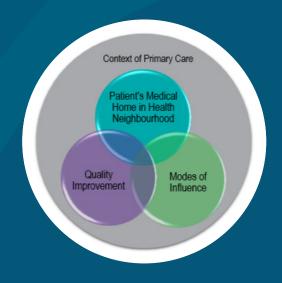
CORE

I can adapt improvement strategies and experiences, translating them from one clinic to another. I consider where each team (and team member) is on the innovation curve and engage practice teams accordingly. I work with my provincial change agent colleagues to spread and scale improvements.

ACCOMPLISHED

I assist in creating spread plans for improvement initiatives in my PCN. I apply Roger' Diffusion of Innovations Theory beyond working with clinic teams, using it to assist my PCN leaders to think about scaling improvements at the PCN level.

ADVANCED



PART 4 OF 4 **COMPETENCY DOMAIN: MODES OF INFLUENCE**

Question 16:

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.

I am not confident to approach practice leaders and teams about changes toward PMH transformation.

EMERGING

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.

ACCOMPLISHED

CORE

ADVANCED

Practice Facilitator

Competency

Key Content Area:

Engagement

Question 17:

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.

I have not heard of any change management approaches or applied change management approaches for my work. I have an awareness of change management theories including the people side of change, organizational change, and transformational change.

CORE

I can incorporate change management principles into QI practice to shift practice teams' mental models from traditional approaches to primary care to new evidencebased PMH approaches.

ACCOMPLISHED

Competency Key Content Area:

Change Management

Competency Key Content

Area:

Project Management

I can apply transformational change theory to change behaviour and primary care culture(s) to influence an entirely new future state.

ADVANCED

EMERGING

Question 18:

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.

I am not familiar with any project management tools or approaches. I am familiar with basic project management tools to support clinic projects and my own projects as a PF.

ACCOMPLISHED

I make regular use of

project management

tools to organize my

clinic teams and my

own PF work.

I have extensive experience using project management tools and have built capacity in my clinic teams to project manage their own work.

ADVANCED

EMERGING CORE

Practice Facilitator

Question 19:

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.

I am not familiar with the core skills of a facilitator (e.g. asking questions, fostering participation, gaining buy-in, managing conflict, etc.). I consistently apply the core skills of a facilitator to contribute structure and processes to practice team interactions enabling teams to identify their goals and help them work towards them.

CORE

I apply my facilitation skills to build capacity with teams in order for them to learn new roles and skills to improve their practices.

ACCOMPLISHED

Competency Key Content Area:

Facilitation

Competency

Key Content Area:

Training

I establish clear boundaries with practice teams about my role, and leverage team member diversity to enable teams to function effectively and make high quality decisions.

ADVANCED

EMERGING

Question 20:

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.

rick the statement that best describes your knowledge, skins, and abilities of the above comp

I am not familiar with using training techniques in my role as a practice facilitator. I am familiar with adult learning principles and can leverage them to communicate when working with practice teams.

knowledge.

ACCOMPLISHED

I consistently apply adult learning principles when working with practice teams and train teams in

OI approaches. I can link

based resources for them

my teams to evidence-

to enhance their clinical

I am training my local and provincial PF colleagues in one or more of the PF competency domains.

ADVANCED

CORE

Question 21:

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.

Competency Key Content Area:

Coaching

Competency

Key Content

Area:

Team Dynamics/

Team Functioning

I am not familiar with how a practice facilitator uses coaching with practice teams. I am familiar with basic coaching skills (e.g. reflective listening) and know when I would apply them with practice teams.

I can identify when to use coaching methods with a team. When appropriate, I can model a coaching approach for practice team members, applying it to individual team members or teams as a whole.

ACCOMPLISHED

I can teach practice teams to use coaching approaches within their own team (e.g., to coach each other through change).

ADVANCED

CORE

EMERGING

Question 22:

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.

I am not familiar with team development tools, or have not applied them to help teams progress with their functioning. I am familiar with various team building and team functioning tools, how to acquire them, and how to apply them to teams effectively.

I can help teams assess their level of functioning and provide constructive feedback on their performance.

I can help teams optimize their performance including productive conflict.

ACCOMPLISHED

CORE

EMERGING

ADVANCED

Practice Facilitator







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