

ACTT Support for Alberta Practice Facilitator Development: Reference Guide for PCN Leaders



August 2019

Please check [TOP Website](#) for the most recent version of this document.

Contents

- Introduction 2
- Practice Facilitator Competencies 3
- Practice Facilitator Self-Assessment 4
- Practice Facilitator Core Training 6
- Practice Facilitator Training: Accomplished and Advanced Competency Development 7
- Practice Facilitator Job Description Template 7
- Improvement Facilitator Network 8
- PCN Strategic Forum: Leading Transformation (Formerly *PCN Strategic Leadership Forum and Change Agent Day*) 8
- Other Practice Facilitator Development Opportunities 9
- Appendix 1 – Key Alberta Practice Facilitator Tools 11

Introduction

This reference guide is intended for PCN leaders to become familiar with the offerings available from ACTT (Accelerating Change Transformation Team) to support the initial and ongoing development of Practice Facilitators (PF) in Alberta.

Since 2013, AMA ACTT (formerly known as the Toward Optimized Practice program) has been offering training and support to Alberta Primary Care Practice Facilitators (formerly referred to as Improvement Facilitators) advancing the implementation of the Patient's Medical Home (PMH).

The initial practice facilitator competencies and associated training offerings were adapted from the IHI's (Institute for Healthcare Improvement) practice coach training and focused on the implementation of the Alberta Screening and Prevention (ASaP) initiative. This training was augmented by 1:1 support from AMA consultants and an ASaP Community of Practice featuring monthly webinars. There was also an associated PF self-assessment tool. As the Patient's Medical Home emerged as a priority over the next few years, the PF training evolved to keep up with the evolution and addition of new initiatives. In 2017, a new provincial Improvement Facilitator Network was formed.

As the understanding and breadth of the PMH and Health Neighbourhood implementation advanced, it was acknowledged that the competencies, training, and support of PFs would need to advance with it. In 2019, a refreshed set of PF Competencies, PF Self-Assessment, and PF Core Training was developed.

More information about these, and more can be found in the following pages. The guide is written so readers can access just the sections they need. As the supports and processes continue to evolve, this guide will be updated.

Practice Facilitator Competencies

The [Practice Facilitator Competencies](#) are the hub of the PF support offerings within ACTT. The current set of PF competencies was built using a literature review, an ACTT subject matter expert synthesis, followed by a review by a group of Alberta PFs. This competency set was built to guide PF work into the future. Its format allows for the document to evolve as both the understanding of the Patient's Medical Home and Health Neighbourhood progresses, and practice facilitation as a profession evolves locally and internationally.

The competencies have been categorized under four domains:

1. *Context of Primary Care*
2. *Patient's Medical Home in the Health Neighbourhood*
3. *Quality Improvement*
4. *Modes of Influence*

The competencies have several applications for the PF, organizations supporting PFs, and ACTT. PCNs and other organizations supporting PFs may consider using the competency documents for the following purposes:

Defining the PF Role

The competencies have been used in the PF Self-Assessment to define a PF progression of skills of *emerging, core, accomplished, and advanced*. This definition can assist the PCN and/or zone to see the capacity of individual PFs, as well as collective capacity in their PCN/Zone.

Recruitment Activities

The competencies can be used by PCNs (or clinics, and other organizations) to create position descriptions, job postings, and to guide the selection of individuals to fill the PF role.

Informing PF Deployment

The competencies can be used to maximize the PF role in supporting member practices. A PCN may consider the PF competency level and the experience level or complexity of a certain intervention with a clinic. Some of the competencies may be distributed across other team members (clinic or PCN) and matching or coordinating knowledge, skills, and abilities can optimize the deployment.

Assessment

The competencies can be used to create tools to assess the level and performance of PFs, and subsequently create personal development plans by PFs and their supervisors. The complementary [Practice Facilitator Self-Assessment](#) has been created by ACTT; please see more information about the self-assessment and related processes in the next section.

Training and Development

PCNs can use the competencies to augment training for their PFs beyond ACTT offerings. ACTT has used the competencies as a guide for development of training materials. This includes the formal 3-day PF Core Training curriculum, development and curation of training materials for accomplished and advanced level PFs, the Improvement Facilitator Network content, and Change Agent Day-type events.

Practice Facilitator Self-Assessment

The [Practice Facilitator Self-Assessment](#) was created as a companion document to the PF Competencies. A self-assessment is recognized as an important tool in both the education and workforce literature.

Some of the benefits outlined in the literature include:

- Empowers individuals to take responsibility for learning
- Increases self-motivation
- Helps individuals become self-regulated learners, which in turn enables them to become adaptive in the workplace
- Increases metacognition (the awareness or analysis of one's own learning or thinking process)

A practice facilitator self-assessment has been completed by Alberta PFs since 2013 when the ASaP initiative began. With the 2019 update of the PF competencies and the PF self-assessment documents, the self-assessment completion processes have also been updated.

Self-Assessment Design

The questions in the self-assessment are in a maturity model format. Most questions have a response across the four levels of *emerging*, *core*, *accomplished*, and *advanced*. The questions are built to capture increasing levels of complexity in the PF's work.

Purpose of the PF Self-Assessment

There are two main purposes of the tool from the ACTT perspective:

1. To offer a tool for PFs to self-assess their competencies, thus directing their own learning and development plans.
2. To provide aggregate data to the ACTT team to guide development and refinement of PF training offerings.

Processes for Completing the PF Self-Assessment

Who should complete it?

Ideally, each PCN will have a written document that outlines the plan for implementing the Patient's Medical Home with their member clinics that includes a dedicated Practice Facilitator. This dedicated resource works directly with practices facilitating/coaching them through incremental changes toward the PMH using quality improvement methodology. This is who the PF Self-Assessment is created for.

If you are unsure about who should complete the self-assessment, please connect with your ACTT zone lead.

When will it be completed?

For new PFs completing the PF Core Training Curriculum, the self-assessment will be sent to them via email six months after their completion of the PF Core Training Session.

For all other PFs, they will be asked to complete the self-assessment once per year. A link will go out via email to each PF who is a member of the provincial Improvement Facilitator Network. This will be in October every year. The tool will be available for this time-frame only (as of the version of this

document we are projecting October 1-31). New PFs who have recently completed the assessment can use their discretion on completing it again within the same year.

There is a paper version of the Self-Assessment tool, PFs can review and complete this at any other time if they wish for their own use.

Privacy and Use of Self-Assessment Data

The electronic survey will require that the PF provides their name, email address, and PCN (or primary care organization). This is to allow for individual progress to be reported back and assessed by the PF over time. Only evaluation personnel on ACTT will have access to the individual data.

Only the PF will receive the results of the self-assessment. ACTT will provide aggregate results to each zone on the self-assessment results for all PFs in their zone.

The completion of the PF Self-Assessment is voluntary. We would ask for your support as PCN leaders in encouraging the PFs to complete the survey.

In Development

There is a plan to add objective measures to the PF Assessment Process.

Practice Facilitator Core Training

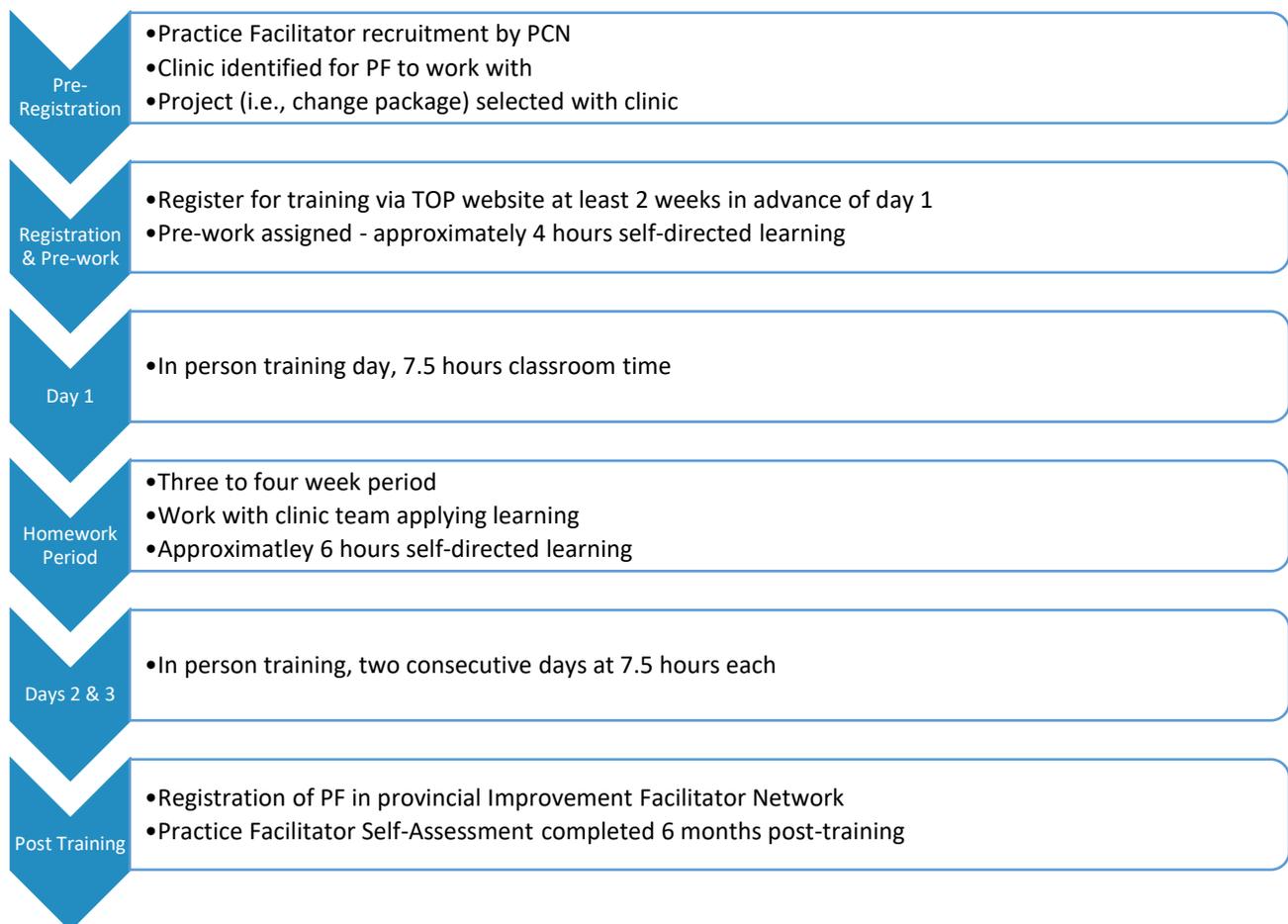
A Practice Facilitator curriculum has been in place since 2013 when the Alberta Screening and Prevention initiative was launched. The approach and content of this training was based on IHI's (Institute for Healthcare Improvement) Improvement Advisor Professional Development Program. As the Patient's Medical Home transformation has emerged as a priority, the training has gradually evolved. In 2019, the practice facilitator competencies were refreshed to meet emerging needs for PMH and the Health Neighbourhood; the core curriculum was refreshed along with it.

Training Philosophy & Approach

The PF Core Training remains based on the IHI approach and the content delivered aligns with evidence and adult learning principles. The in-person training hours are 80% activity-based learning.

Practice Facilitator Core Training Summary

The Practice Facilitator Core Training is approximately 34 hours of in-person and self-directed learning time. The summary below includes the timeline, associated hours, and key activities by the PCN leaders and Practice Facilitators.



For more information on the content covered in each day, please see the [Practice Facilitator Core Curriculum: Training Map](#).

Pre-Registration Activities (PCN Leader Activities)

Core Practice Facilitator Training offerings are generally held four times per year, with two trainings in Edmonton and two trainings in Calgary. Additional trainings in those locations and elsewhere in the province are considered on a case by case basis. The training schedules are posted on the TOP website at least 4 months in advance of the training.

Project Requirement

Training registrants are required to have at least one clinic team they are working with on a specific improvement project. The clinic must be confirmed in advance of arriving for day 1 of training. The clinic team will have agreed to work on one of the current change packages offered through ACTT:

- Panel
- Alberta Screening & Prevention
- Continuity
- CII-CPAR (Community Information Integration-Central Patient Attachment Registry)
- Opioid Process Improvement

Registration

Participants should be registered at least two weeks in advance of day one of training to allow for adequate time for pre-work to be completed. This also ensures that minimum numbers for sessions are reached for the training to proceed. Current training offering and links to registration can be found [here](#).

Questions

Please direct questions about PF Training to IFAdmin@albertadoctors.org

Practice Facilitator Training: Accomplished and Advanced Competency Development

This work is in development.

Practice Facilitator Job Description Template

The [Practice Facilitator Job Description Template](#) is based on the Practice Facilitator Competencies. It incorporates some of the key competencies into a template that PCNs or other organizations can customize in their own organizations.

Improvement Facilitator Network

The provincial Improvement Facilitator Network (IFN) was launched in the fall of 2017. The IFN has approximately 80 active members (as measured by participation in network offerings) and 125 members with an IFN Collaborate Website login.

The IFN main activities include:

- Monthly webinars from September to June focusing content on the four PF competency domains
- Maintaining a resource page on the website and an interactive discussion board for members to connect and share learnings and tools with their peers
- Dissemination of key documents and messages relevant to PFs from ACTT

Participation in the IFN is voluntary. Please invite your PFs to sign up for this network.

To request membership in the IFN, please email IFAdmin@albertadoctors.org

More information about the IF Network can be found on the [TOP website](#).

PCN Strategic Forum: Leading Transformation (Formerly *PCN Strategic Leadership Forum* and *Change Agent Day*)

The PCN Strategic Forum: Leading Transformation is a new event coming in 2020; it is combining two legacy events of the *PCN Strategic Leadership Forum* and *Change Agent Day*. This is planned to be a two-day event including the audience of PCN Board Chairs, PCN Executive Directors, Practice Facilitators, Physician Champions, and other change agents. This event will bring these groups together to learn and share experiences to advance knowledge, skills, and abilities of those leading implementation of the PMH.

This event is scheduled for Feb 7-8, 2020.

Please stay tuned for more details coming from ACTT.

Practice Facilitation Evidence Review

An evidence summary for practice facilitation has been developed. This work is a collaboration of the College of Family Physicians Canada, and ACTT.

[Growing Practice Facilitation in Primary Care – The Art and Science](#)

Other Practice Facilitator Development Opportunities

There are several opportunities across multiple organizations for PFs to tap into for extra development and support. This list below is not exhaustive but represents opportunities ACT Team members currently access and find to be high quality.

IHI (Institute for Healthcare Improvement) Open School

The IHI Open School is a global learning community with a focus on building core skills in improvement, safety, system design, and leadership.

The AMA currently holds a license through to January 2020 for Practice Facilitators to access free of charge including the online learning modules.

More information can be found here:

<http://www.ihl.org/education/ihlopenschool/overview/Pages/default.aspx>

As the course covers a variety of topics, not all content will be directly applicable to all PFs. A list of recommended courses for Alberta PFs can be found here: <http://www.topalbertadoctors.org/file/ihl-open-school-courses.pdf>

If you would like to register, please email IFAdmin@albertadoctors.org

International Conference on Practice Facilitation

To date, there have been three instances of the *International Conference on Practice Facilitation* hosted by NAPCRG (North American Primary Care Research Group). The conference is in support of an overarching goal to promote an ongoing and sustainable international learning community for practice facilitation. The audience includes researchers, health care professionals and managers, and practice facilitators. The conference provides an opportunity for practice facilitators to learn about best practices in the profession and to interact with peers and others who are shaping the development of a new healthcare profession.

For more information, please visit the conference website:

<https://www.napcrg.org/conferences/icpf/about-icpf/>

International Practice Facilitator Learning Community Listserv

This listserv is an international community of practice facilitators who share resources and ideas on practice facilitation.

To join, email Dr. Zsolt Nagykaldi: Zsolt-Nagykaldi@ouhsc.edu

AHRQ (Agency for Healthcare Research and Quality)

AHRQ is a United States-based federal agency charged with improving the safety and quality of America's health care system. AHRQ's Primary Care Practice Facilitation (PCPF) learning community provides information and learning opportunities to individuals with an interest in practice facilitation as one way to improve primary care practice. It includes:

- Practice Facilitation Curriculum and Training
- Practice Facilitation Case Studies
- Quality Improvement Resources

More information can be found on their website: <https://pcmh.ahrq.gov/page/practice-facilitation>

Appendix 1 – Key Alberta Practice Facilitator Tools

- [Practice Facilitator Competencies](#)
- [Practice Facilitator Self-Assessment](#)
- [Practice Facilitator Job Description](#)
- [Practice Facilitator Evidence Review](#)
- [Practice Facilitator Core Training Curriculum Outline](#)
- [Sequence to Achieve Change](#)
- [Improvement Facilitator Network](#)
- Improvement Facilitator Collaborate Website (access by registration only)
- Change Packages Overview (In development)
- Blueprint for Change Agents Advancing Primary Care Transformation in Alberta (In development)
- EMR Network – Alberta (Coming Fall 2019)