

Planning for Practice Facilitation Checklist

You've got a great project in mind and would like to incorporate practice facilitation. What can you do to help make your project go as smoothly as possible? The "buckets" below will help you think through how to plan for practice facilitators based on your research or project.

Timeline
-How long is the intervention and how much PF support will your project require?

Dose
-What expectations does your project have for PF interaction with practices?
-How often will the PF visit each practice site?
-How long will practice site visits be?
-Will there be practice connections between site visits (email check ins, phone calls, webinars, etc.)?

Milestones
-What objectives drive outcomes in your project?
-How can those large objectives be broken down into manageable goals at the practice level?
-Are there phases of progression in practice milestones to move practices towards the desired outcome of objective?
-Consider how each of these milestones will be implemented and measured
-Consider how to move practices through these milestones that align with your project timeline and PF dosing

Measurement
-What outcomes are you measuring?
-How will individual practices measure those outcomes?
-How often will practices report measures to the project?
-How will practices use their own data to measure progress and drive quality improvement?

Training
-How will PFs be trained to support practices in accomplishing the project goals/objectives/milestones?
Training would include overview of grant/project, **learning the intervention or innovation**, plan for dose, timeline, milestones, plan for monitoring

Budget
-How you define each of the elements discussed should be considered in proposed budget
-How much will it cost to field a PF to do all of the work as you have defined, including:

- Travel
- Planning time
- Documentation

What to look for in Practice Facilitator: Characteristics and Skillsets

Personality Characteristics/Background of Practice Facilitators¹

- Demonstrate empathy and understanding of others' needs
- Communicate in a genuine, positive, and respectful way to establish and maintain relationships
- Know when to speak, when to listen, and know how to handle criticism
- Communicate in a timely manner, assuring prompt response to stakeholder feedback to achieve project milestones
- Need to be flexible, adapting their efforts and response to local context, including needs and resources
- Need to be self-confident, innovative and resourceful, as well as exhibit energy and enthusiasm
- Need to be credible, approachable, and accessible
- Also need the appropriate knowledge and skills to support implementation
- Has basic knowledge of implementation science, quality improvement, and organizational change processes, as well as the organizational policies, structures, and contexts that can affect implementation

Practice Facilitator 5 Core Competencies identified by Richie et al.²

Can the Practice Facilitator:

- Build relationships with and between others and create a supportive environment for change?
- Help change the system of care and the structure and processes that support it?
- Transfer knowledge and skills and create infrastructure support for ongoing learning?
- Plan and lead change efforts?
- Assess people, processes, and outcomes and create infrastructure for program monitoring?

References:

¹ Ritchie MJ, Dollar KM, Miller CJ, Smith JL, Oliver KA, Kim B, Connolly, SL, Woodward E, Ochoa-Olmos T, Day S, Lindsay JA, Kirchner JE. Using Implementation Facilitation to Improve Healthcare (Version 3). Veterans Health Administration, Behavioral Health Quality Enhancement Research Initiative (QUERI), 2020. Available at:

<https://www.queri.research.va.gov/tools/implementation/Facilitation-Manual.pdf>

² Ritchie MJ, Parker LE, Kirchner JE. From novice to expert: a qualitative study of implementation facilitation skills. Implement Sci Commun. 2020;1(1):7.

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