Primary Care Practice Facilitation Curriculum

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INTRODUCTION

About AHRQ's Primary Care Practice Facilitation Curriculum

The Primary Care Practice Facilitation (PCPF) Curriculum is designed to support the development of a PCPF workforce prepared to help transform and revitalize primary care by supporting widespread adoption of new models of care delivery and the use of continuous quality improvement to improve health care outcomes. This PCPF curriculum can serve to train both new and experienced practice facilitators in the knowledge and skills needed to support meaningful improvement in primary care practices.

This curriculum builds on and expands earlier training resources for PCPF developed by the Agency for Healthcare Research and Quality (AHRQ). Some of the curriculum modules are new, and others are updated versions of material available in the *Practice Facilitation Handbook.* The objective of this curriculum is to provide a more comprehensive practice facilitator training curriculum. In conjunction with other practice facilitation training resources available from AHRQ (see text box below), this curriculum can be used to develop a comprehensive PCPF training program.

Other Practice Facilitator Training Resources from AHRQ

The Practice Facilitation Handbook: Training Modules for New Facilitators and Their Trainers
This handbook is the previous version of the training materials provided here.
https://www.ahrq.gov/ncepcr/tools/pf-handbook/index.html

Developing and Running a Primary Care Practice Facilitation Program: A How-to Guide
This resource includes information on hiring, training, and supervising practice facilitators. The guide has information on the background and basic skills that practice facilitators should have prior to training.
https://pcmh.ahrq.gov/sites/default/files/attachments/Developing_and_Running_a_Primary_Care_Practice_Facilitation_Program.pdf

Integrating Chronic Care and Business Strategies in the Safety Net
This is a step-by-step guide to for primary care teams working on quality improvement focused on implementing the chronic care model.
https://www.ahrq.gov/ncepcr/care/chronic-tool/index.html

This PCPF curriculum consists of 32 training modules. As described below, Module 1 provides information for instructors on adult education methods. Modules 2 through 32 focus on specific competencies and skills. Each module begins with an Instructor's Guide, which identifies the PCPF competencies addressed in the module, the time that learners will need for preparation (including reading background material) and for the instructional session, the objectives of the module, and suggested instructional approaches. Each module contains instructional text on the topic written for both the instructor and learners.

The PCPF curriculum is organized into five parts:

- **Part 1: Use of Adult Education Methods in Teaching PCPF Core Competencies, Module 1.** Focuses on adult education methods and is intended for use by instructors. It offers an overview of recommended training approaches and describes how each subsequent module contributes to the development of competencies that practice facilitators need for supporting primary care practice improvement.
- **Part 2: Introduction to Practice Facilitation, Modules 2 through 7.** Provides a basic introduction to practice facilitation and work with primary care practices and includes an overview of a typical facilitation process. This part of the curriculum also introduces the importance of professionalism in the practice facilitation process.
- **Part 3: Core Competencies for Practice Facilitators, Modules 8 through 16.** Presents core competencies for practice facilitators. This part aims to build expertise that is valuable for facilitators regardless of the specific improvement topic. Core competencies include quality improvement techniques and measurement skills.
- **Part 4: In the Practice, Modules 17 through 23.** Provides training in common tasks a facilitator may undertake in practice settings, such as assessing readiness for change, preparing a practice to work with a facilitator, holding kickoff meetings, working with and supporting practice leaders, and running effective meetings.
- **Part 5: Implementing the Care Model and Patient-Centered Medical Home, Modules 24 through 32.** Includes information for facilitators working with practices that are implementing the Care Model or are transforming into patient-centered medical homes (PCMHs). Both the Care Model and the PCMH promote changing delivery systems to encourage responsiveness to patients' needs and preferences.

A complete list of the modules included in each of the PCPF Curriculum's five parts is provided below.

Contents of the PCPF Curriculum

Part	Modules
Part 1: Use of Adult Education Methods in Teaching PCPF Core Competencies	Module 1: Instructor's Guide to Using the PCPF Curriculum
Part 2: Introduction to Practice Facilitation	Module 2: Practice Facilitation as a Resource for Practice Improvement Module 3: The Primary Care Landscape Module 4: An Introduction to Practice Organization and Management Module 5: Special Considerations When Working With Safety Net Practices Module 6: An Overview of the Facilitation Process Module 7: Professionalism for Practice Facilitators
Part 3: Core Competencies for Practice Facilitators	Module 8: Approaches to Quality Improvement Module 9: Using Appreciative Inquiry with Practices Module 10: Mapping and Redesigning Workflow Module 11: Using Root Cause Analysis to Help Practices Understand and Improve Their Performance and Outcomes Module 12: An Introduction to Assessing Practices: Issues to Consider Module 13: Measuring and Benchmarking Clinical Performance Module 14: Collecting Performance Data Using Chart Audits and Electronic Data Extraction Module 15: Preparing and Presenting Performance Data Module 16: Academic Detailing as a Quality Improvement Tool
Part 4: In the Practice	Module 17: Introducing a Practice to Facilitation Module 18: Assessing Practice Readiness for Change Module 19: Conducting a Kickoff Meeting Module 20: Creating Quality Improvement Teams and QI Plans Module 21: Working With and Supporting Practice Leaders Module 22: Running Effective Meetings and Creating Capacity for Practices to Run Effective Meetings Module 23: Documenting Your Work With Practices

Part	Modules
Part 5: Implementing the Care Model and Patient-Centered Medical Home	Module 24: Introduction to the Care Model Module 25: The Patient-Centered Medical Home: Principles and Recognition Processes Module 26: An Introduction to Electronic Health Records and Meaningful Use Module 27: Helping Practices Optimize EHRs for Patient-Centered Medical Home Transformation and Quality Improvement Module 28: Using the AHRQ Care Model Toolkit with Practices Module 29: Implementing Care Teams Module 30: Building Teams in Primary Care Module 31: Facilitating Panel Management Module 32: Improving Self-Management Support and Engaging Patients in Care and Practice Improvement Topics

How to Use This Curriculum

This curriculum is designed to be used by an instructor as a resource when preparing new and experienced facilitators to work with primary care practices. Practice facilitators may also use the curriculum independently for self-study by omitting the instructor's guide at the beginning of each module. As with any curriculum intended for use with adult learners, the use and sequence of the modules should be tailored to learners' needs. Not all facilitators may benefit from all modules and, in general, the modules do not need to be completed sequentially. In those cases where modules build explicitly on learning from other modules, the instructor's guides clearly indicate the proper sequencing of learning. For example, Module 30 on "Building Teams in Primary Care" builds directly on the more specific case of "Implementing Care Teams" discussed in Module 29. Additionally, Modules 13-to-15 cover the full spectrum of skills that facilitators need for helping practices use data in their improvement and transformation efforts and, in most cases, should be completed sequentially.

Follow principles of adult education. The instructional exercises provided in the instructor's guide of each module follow the principles of adult education: **Individuals learn best when the educational process is interactive, and when the existing expertise and experience of the learner is recognized and used as a resource in the educational process.** Instructors are encouraged to incorporate the exercises suggested in each module into their teaching as well as others they may have used in the past. Whenever possible, instructors are also encouraged to invite experienced practice facilitators to co-teach specific modules and to discuss their "real world" experiences from working with practices. Learners will need get into the field and use their new skills as they help practices transform, and then reflect on their experiences as part of their ongoing professional development.

Tailor instruction to the needs of each learner. Instructors should tailor the sessions to meet the needs of the learners as well as the facilitation program that is sponsoring the training. The modules may be delivered as an intensive workshop of multiple hours or days, or in a series, such as weekly forums. The materials are designed primarily for onsite delivery to a group of learners but can be adapted for delivery through virtual conferencing. To deliver the curriculum virtually, the instructor will need to modify the interactive elements of each module to fit the virtual environment.

Encourage group activities. Working with a group of learners allows for interactive learning methods such as group discussions and role plays. However, the modules can be adapted for individualized self-study. In these cases, the learners may choose modules tailored to their specific needs. Interactive sections that require group participation can be eliminated or modified. For example, the learners could record responses to discussion questions in a journal.

Develop additional materials to support instruction. While the curriculum is intended to be comprehensive in its content and provide a solid introduction to the basics of facilitation, instructors will need to develop additional materials to complement those provided here. For example, the content of each module can be used to create presentations to support lectures and group activities.

Primary Care Practice Facilitation as an Emerging Profession

The PCPF workforce is an emerging profession with a developing body of knowledge and set of standards. The Agency for Healthcare Research and Quality has played an important role in supporting the development of this emerging workforce by:

- commissioning training materials, PCPF program handbooks, a national PCPF listserv and periodic e-newsletter,
- consensus reporting by experts, and
- research on the effectiveness of different facilitation approaches.

This curriculum for PCPF training builds on and expands this prior work.