



# Practice Facilitation SKILLS WORKSHOP

in partnership with

**nrhi**

Network for  
Regional Healthcare  
Improvement

High-Value Care  
Support and  
Alignment Network

## Storytelling for Transformation

*Practice Transformation Initiative, a program of:*







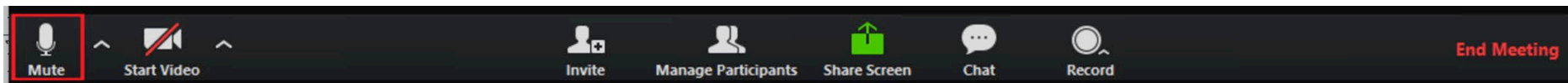
Integrated  
Healthcare  
ASSOCIATION



CCI  
CENTER FOR CARE  
INNOVATIONS

# Tech Tips – Zoom Meetings

 Mute	 Start Video	 Chat	 Manage Participants
<p>MUTE / UNMUTE</p> <p>Click on the microphone icon.</p>	<p>VIDEO ON / OFF</p> <p>Click on the video camera icon.</p>	<p>CHAT</p> <p>Click on the chat icon to send questions and comments.</p>	<p>RAISE YOUR HAND</p> <p>Click on the 'Manage Participants' to contribute to the conversation.</p>





Crystal  
Eubanks

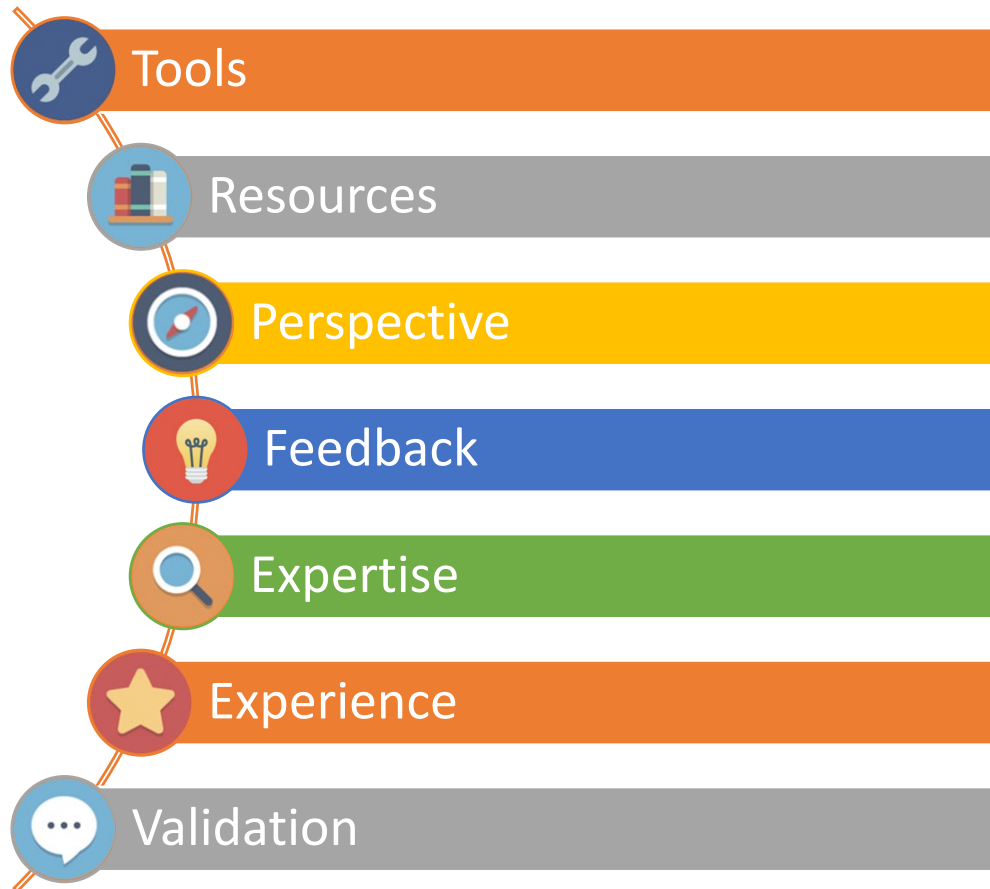


Kate  
Elliott

# Hello and welcome!



# Utilizing your coach support network



- Ask and offer another practice facilitator...
  - how to overcome a similar challenge.
  - perspective on a difficult situation.
  - a tool or resource used successfully.
  - expertise on a particular subject.
  - celebration!



# Today's Agenda

1. Touch base from previous workshop
2. Review today's topic and objectives
3. Reflect on sharing stories for change
4. Prepare improvement stories
5. Discussion & Wrap-up



# ACCELERATING IMPROVEMENT

POLL:

**What were you  
successful at  
transferring  
into your work?**

Use organizational goals to promote buy-in.

Organize scheduling of time at clinicians' offices.

Quantify how many practices are / are not at goal.

Identify / prioritize practices close to performance goals.

Automate referrals.

Something else?



# Upcoming Workshop Topics







POLL:

**How confident are you that you can craft a transformation story based on the work you have done with practices through PTI?**

*Practice Transformation Initiative, a program of:*



# REFLECT on sharing stories

*Practice Transformation Initiative, a program of:*

12/5/2019



# PTI Wide Goal

By December 31, 2017, each provider organization in our network will identify one story within each of the three primary drivers:

Patient  
Family  
Engagement

Continuous,  
Data-Driven  
Quality  
Improvement

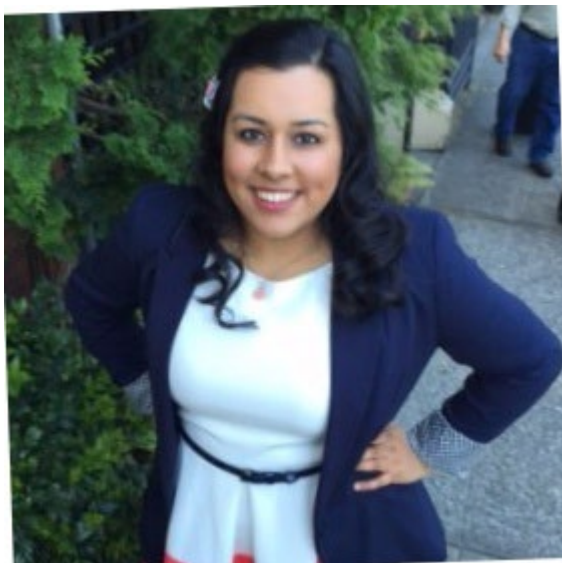
Sustainable  
Business  
Operations



# Spirit of Transformation Q2 Awardees



Pooja Bhatt



Susan Le



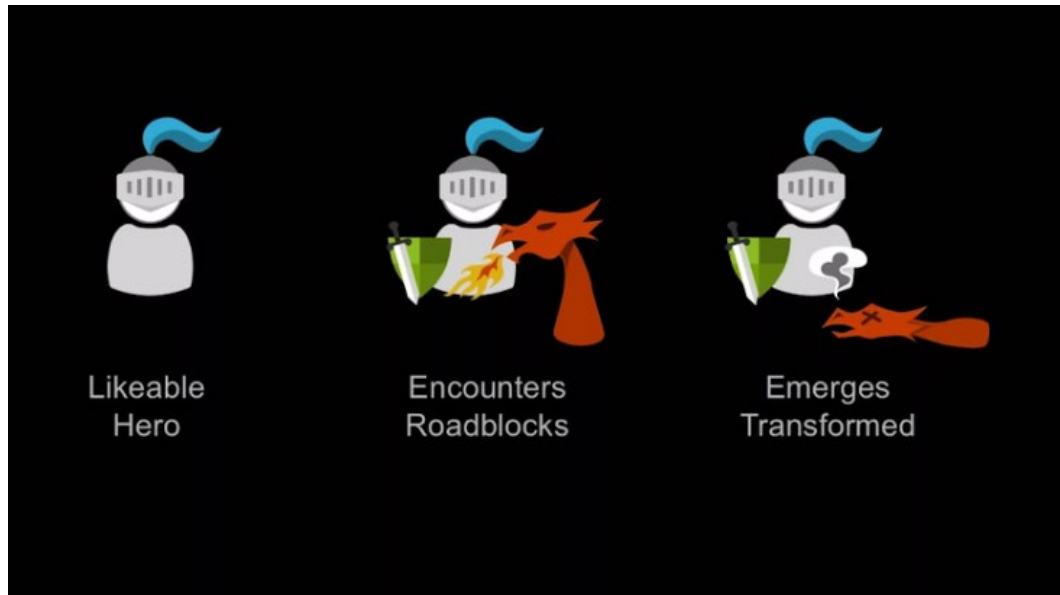


CHAT:

**What made these stories stand out?**

*\*Please unmute or chat in to share your thoughts.\**

# PREPARE Improvement Stories



*Practice Transformation Initiative, a program of:*

# Thanks for having me!



- Led an initiative to support practices in Oregon with medical home development
- Lots of experience with performance stories – hearing them, collecting them, using them to educate and motivate

# What do we mean by performance story?

Sharing a lesson learned, bright spot, promising practice – no matter the result, these stories are about making a change

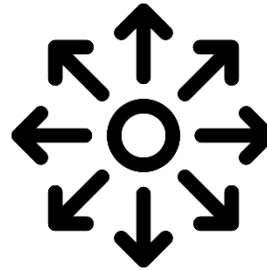
Variety of mediums to reach your audience

Highlight certain aspects depending on the audience

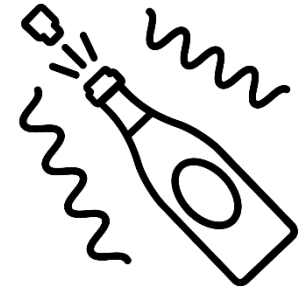


# Why performance stories?

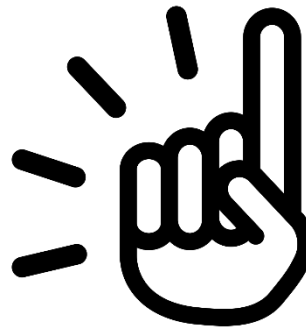
Practice facilitators are in a unique position to capture these stories!



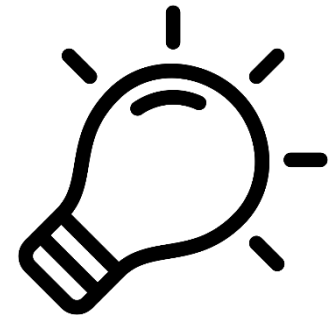
**Sharing and spreading promising practices**



**Acknowledging and celebrating the work of a team**



**Convincing and motivating leadership and peers**



**Communicating important information in an engaging way**



# Performance Story Guide

## Performance Story Info

- Your Story
- Improvement Measures
- Audience
- Learnings
- Challenges/Barriers
- Sustainability
- Supportive Partners

## Supporting Information

- Delivering your Story
- Resources and Tools



## Childhood Health Mental Health Referral Process

### Context

- Presenting at a community meeting between physical and mental health providers
- Mutually acknowledged need for better communication between parties
- Many complicating factors that contributed to people feeling lost about where to start

**Spend a few minutes reviewing handout, raise hand when you're done.**

**[Learn more about this practice's behavioral health journey in a 10 minute virtual clinic visit >>>](#)**



# Childhood Health Mental Health Referral Process

## 1. **Your Story:** The what, the why, the how, the who, and the impact

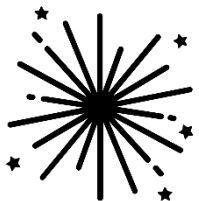
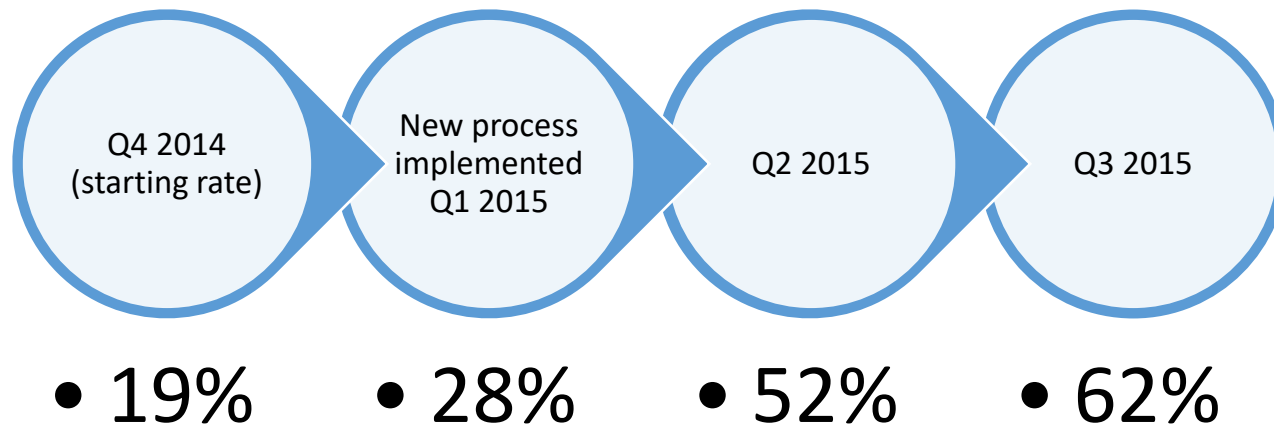
- What was the change?
- Why did the practice initiate it, i.e., the need for the change?
- How did they implement it: key steps and strategies?
- Who was involved?
- How has this work helped to improve care in the practice?

Chat in  
responses



## Childhood Health Mental Health Referral Process

**2. Improvement Measures:** Measurement helps practices know whether a change is an improvement or just a change.



Note: This was presented in August 2015, today their rate is 73%



## Childhood Health Mental Health Referral Process

**3. Audience:** Consider the audience for this story, you will highlight different aspects of a story depending on the audience.

- Who will listen to this story?
- What do they already know, and what do they want to know?
- What are the 2 – 3 key takeaways you hope the audience gets from this story?

How do  
you think  
this story  
resonated  
with the  
audience?

# Welcome Cheryl Marks



- Listen to Cheryl's story and identify:
  4. Learnings
  5. Challenges/Barriers
  6. Supportive Partners
  7. Sustaining the Vision

Practice Transformation Advisor



*Practice Transformation Initiative*

# Putting it all together...

## Delivering Your Story

- Short verbal presentation (beginning, middle, end), focus on 3 – 5 key takeaways
- Handouts or visuals may include resources and tools, but may also include things like team photos, photos of the clinic

## Resources and Tools

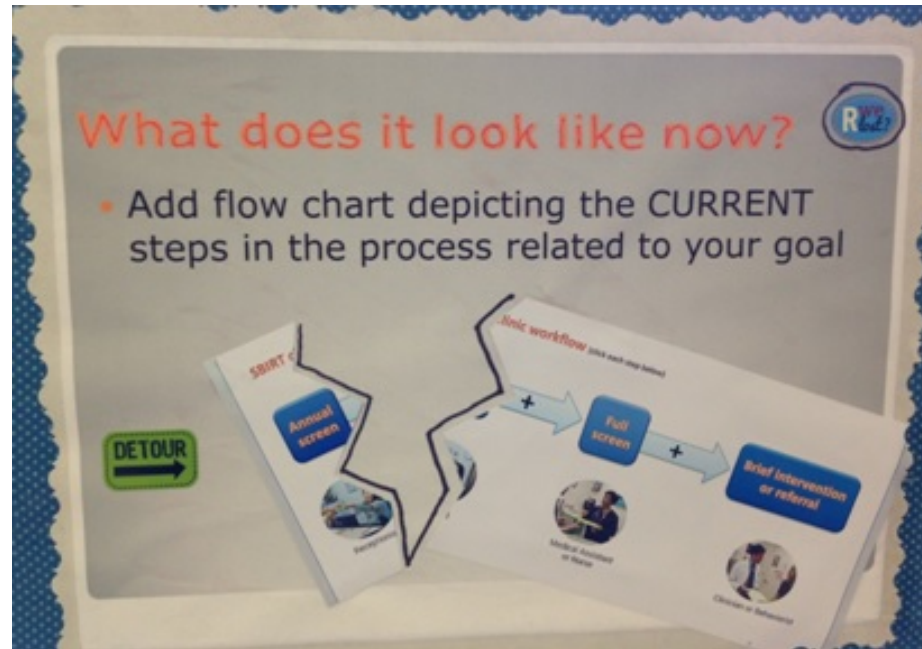
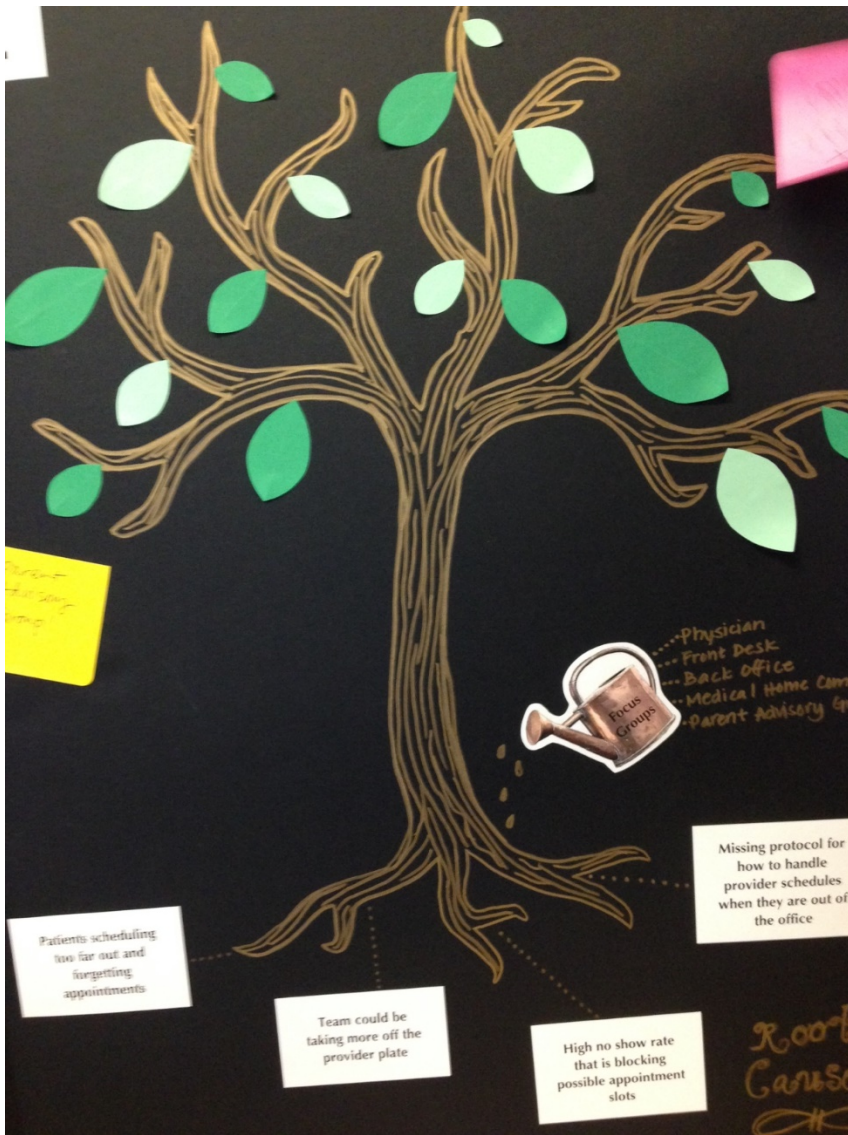
- Are there tools or other materials that were used to bring about the practice's change or improvement that can be shared?



- PDSA documentation, project charters or plans
- Written protocols, standard operating procedures or checklists
- Meeting agendas, materials, presentations
- Graphs or other data
- Workflow or other process diagrams
- Patient-facing materials like posters, flyers, brochures, newsletters, webpages

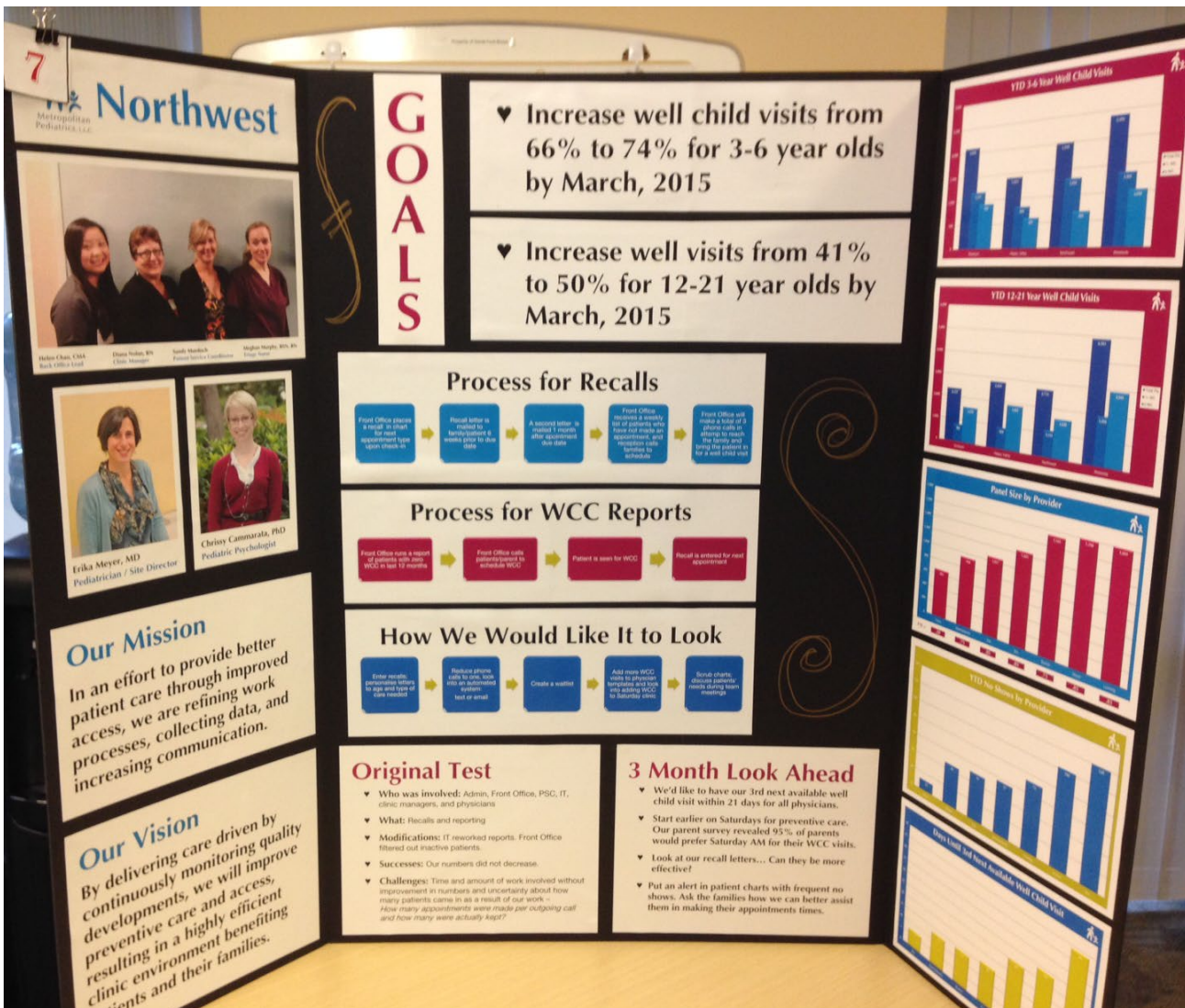


# Visuals Metaphors Symbols



Source: [Six Practices Working to Improve Access and Patient-Centered Care](#), Patient-Centered Primary Care Institute blog, October 2014

# Present Data, Processes



Source: [Six Practices Working to Improve Access and Patient-Centered Care](#), Patient-Centered Primary Care Institute blog, October 2014

NATIONAL COLLEGE OF NATURAL MEDICINE

# Care Teams

Your NCNM Healthcare Team is a team of naturopathic physicians, chiropractors and other natural medicine healthcare providers. The members of your NCNM Healthcare Team work together to make sure they're all on the same page when it comes to your health.

Questions? Ask for Shannon McCartor Foisy, Renee Wright or Sarah Hammer.



## Patient-Facing Materials

Source: [Forming Meaningful and Engaging Teams: Keys to Success](#), Patient-Centered Primary Care Institute blog, April 2015



## Parents, We Heard You!



A year ago, we sent out surveys to learn how we are doing with the care we provide. We want to say *Thank You*.

We received 52 surveys!

Here is what we learned from our Woodburn families:

### What Is Going Well

**Getting Care When You Need It**  
9 out of 10 parents said they usually or always got needed care.

**Providers at Woodburn Listen**  
9 out of 10 parents said their providers usually or always listen carefully to them.



### What We Can Do Better

Only 2 out of 5 parents said that someone talked to them about *barriers and goals* for their child's health.

Only 2 out of 5 parents said their provider gave them information about how to *keep their child from getting injured*.



### Using Your Feedback To Improve

We are working on a project to partner with our patients and set health goals:

- \* We will be focusing on how we can develop care plans that fit your child's needs.
- \* Those care plans will help track progress on health goals.

Our Improvement Team:

- \* A team at Woodburn Pediatrics is working on this project.
- \* Your opinion is valuable!



Let us know if you want to JOIN OUR IMPROVEMENT TEAM @ 503-981-5348

THANK YOU FOR PARTNERING WITH US TO GIVE THE BEST CARE POSSIBLE

# Patient-Facing Materials

Source: [Engage, Collect, Partner: How to Use Patient Experience of Care Surveys in Your Practice](#), Patient-Centered Primary Care Institute webinar, May 2014



POLL:  
Which components of a good story  
could you improve upon?

Clarify the  
Change

Share Measures  
Data

Adapt to the  
Audience

Detail the  
learnings

Highlight the  
Challenges

Summarize  
Partner  
Contributions

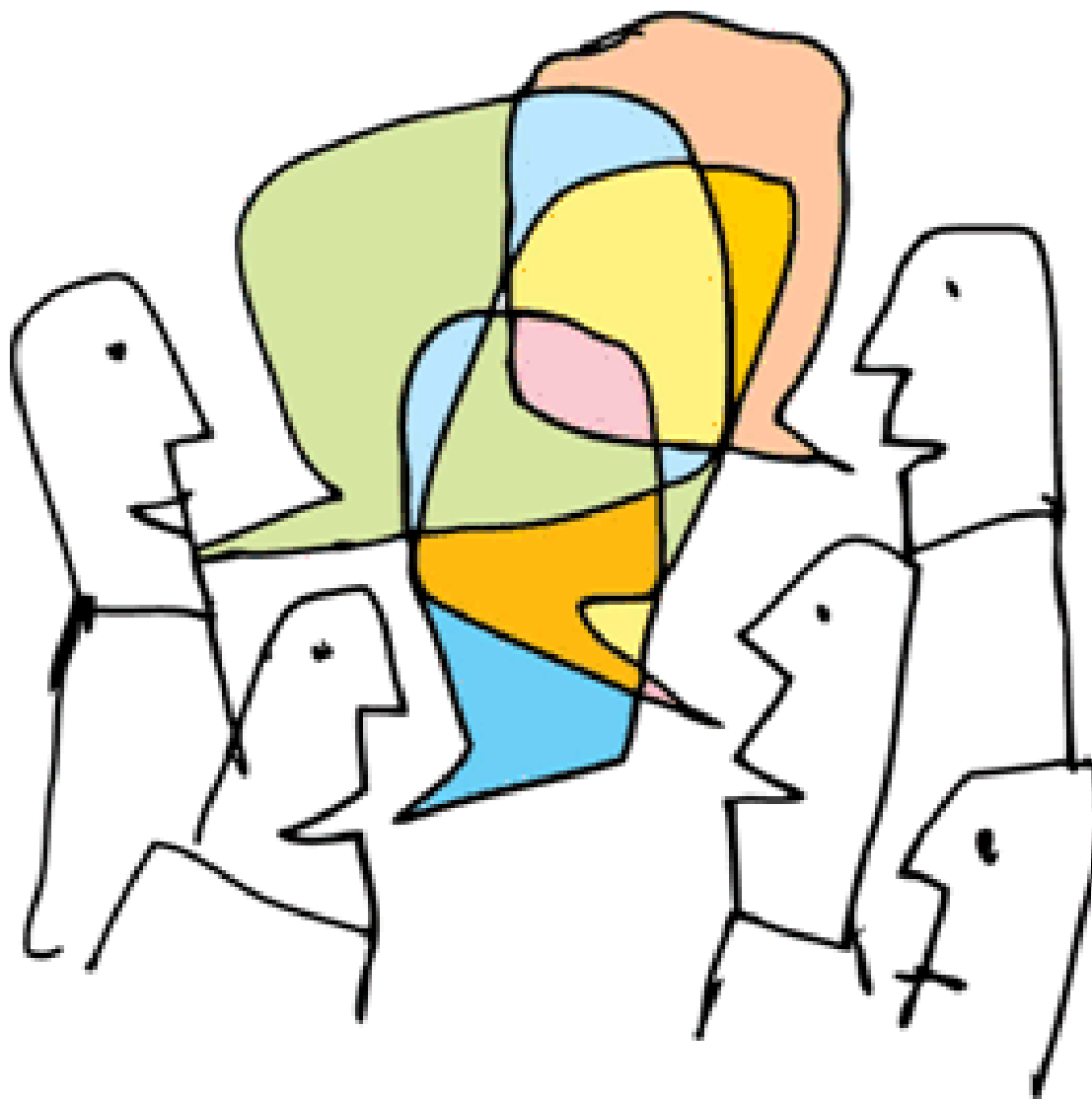
Call to Action

# Performance Story Inspiration

- [Behavioral Health Integration Virtual Clinic Visits](#) [videos]
- ["One Ring-a-dingy:" Small, Rural Practices' Response to Meeting PCPCH Must Pass Standard 1.C.0](#) [blog post]
- [Tip Sheets](#) [tip sheets based on exemplary medical homes]

**Thank you!**

What  
more  
do you  
want to  
know?



What  
else  
do  
you  
need?

*Practice Transformation Initiative, a program of:*

12/5/2019



CHAT:  
What will you transfer into your work from  
this workshop today?

*\*Please chat in to share your response.\**

*Practice Transformation Initiative, a program of:*





## UPCOMING EVENTS

- **September 20<sup>th</sup>** @ 1pm: [Share & Learn Webinar – New and Improved PAT](#)
- **October 3<sup>rd</sup>-4<sup>th</sup>** @ Long Beach Marriott: [PTI Quarterly Convening](#)
- **October 12<sup>th</sup>** @ 10am:  
[Practice Facilitation Skills Workshop – Accelerating Improvement Towards Targets, Part 2](#)

# 2017 Practice Facilitation Skills Workshops

February 2

BUILDING  
RELATIONSHIPS WITH  
PRACTICES

March 2

MANAGING PRACTICE  
FACILITATION WORK

April 13

CREATING QI PLANS

May 4

BUILDING CAPACITY &  
MOTIVATION FOR  
CHANGE

June 1

ACHIEVING PHASE 2  
MILESTONES

July 6

FACILITATING LEARNING  
FOR TRANSFORMATION

August 3

ACCELERATING  
IMPROVEMENT  
TOWARDS TARGETS -  
PART 1

September 7

STORYTELLING FOR  
TRANSFORMATION

October 12

ACCELERATING  
IMPROVEMENT  
TOWARDS TARGETS -  
PART 2

November 2

ACHIEVING PHASE 3  
MILESTONES

December 7

YEAR-END REFLECTION &  
PLANNING

*Practice Transformation Initiative*

# Stay Connected



**NEWSLETTERS**  
*PTI Weekly Email*  
*CQC Newsletter*



**SOCIALCAST**  
*Virtual Learning Community*



**BOX**  
*Virtual Library*



**PTI DATA PORTAL**

*Practice Transformation Initiative, a program of:*

Crystal Eubanks

Senior Manager - Practice Transformation

[ceubanks@calquality.org](mailto:ceubanks@calquality.org)

Jen Burstedt Correa

Project Manager

[jburstedt@calquality.org](mailto:jburstedt@calquality.org)

*Practice Transformation Initiative, a program of:*

# Help us improve our offerings!



Share your feedback here:

[https://www.surveymonkey.com/r/pfsw\\_170907](https://www.surveymonkey.com/r/pfsw_170907)

*Practice Transformation Initiative, a program of:*