

# Primary Care Practice Facilitation Curriculum

Module 7: Professionalism for Practice Facilitators



Agency for Healthcare Research and Quality

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# Primary Care Practice Facilitation Curriculum

## Module 7. Professionalism for Practice Facilitators

### **Prepared for:**

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## Contents

Instructor’s Guide .....	1
Time .....	1
Objectives .....	1
Exercises and Activities To Complete Before, During, and After the Session .....	1
Module 7. ....	3
Professionalism in Personal Behavior .....	3
Professional Interactions With the Practice .....	6
Maintaining Professional Relationships .....	9
Professionalism Within Your PF Program .....	17
Summary and Conclusions .....	23
References.....	24
Appendix 7A.....	25
Appendix 7B.....	26
Appendix 7C.....	28

# Module 7. Professionalism for Practice Facilitators

## Instructor's Guide

Practice facilitator (PF) competencies addressed in this module:

- Professionalism
- Commitment to continuous learning

### Time

- Pre-session preparation for learners: 60 minutes
- Session: 90 minutes

### Objectives

After completing this module, learners will be able to:

1. Identify key behaviors and actions that connote PF professionalism.
2. Demonstrate professional behaviors in interactions during class and in the field.
3. Develop a plan for continuous learning for the coming year.

### Exercises and Activities To Complete Before, During, and After the Session

**Pre-session preparation for learners.** Ask the learners to review the following information. (60 minutes)

1. The content of the module.

**During the session.** Presentation (30 minutes)

1. Present key concepts from the module.

**Activity (45 minutes)**

**Let's Keep It Professional activity (45 minutes)**

1. Hand out the case on professionalism in [Appendix 7A](#) to learners.
2. Ask learners to break into pairs.
3. Tell the learners to consider any of the professionalism topics described in this module and think of an issue they had to confront with practices as a PF or in similar previous work that required them to exhibit professional conduct.
  - a. For learners who do not have an experience to share, the case in [Appendix 7A](#) can be used to

spark discussion.

4. Ask learners to write down their understanding of the issue, solution, and outcome.
5. Ask learners to take turns sharing their experiences with their partner *without* sharing the solution and outcome.
6. Ask each learner to reflect on their partner's story and share with the larger group how the issue could have been resolved and what elements of professional conduct are contained in the solution.
7. After the learner has shared the partner's story and thoughts on possible solutions for it, the partner will then reveal the actual solution and outcome.
8. Ask learners to regroup and each lead a discussion of the following questions (15 minutes for each learner?):
  - a. What did you learn about your partner from this exercise?
  - b. Did your solution match your partner's? If not, how did they differ?
  - c. What aspects of professional behavior and conduct were evident in the actual solution?
  - d. What will you take away from today's activity?

## Module 7.

**W**hat is professionalism? *Merriam-Webster* (2014) defines it as the “skill, good judgment, and polite behavior that is expected from a person who is trained to do a job well.”

Behaving professionally as a practice facilitator (PF) will help you build credibility with the practices you work with and for the profession generally. Professionalism is more than what you wear and what you say; being professional also reflects your attitude and demeanor.

Professionalism is particularly important for you to establish credibility with your clients. As a PF, you will work with diverse groups of individuals, including both highly educated medical practitioners and patients who may not have finished high school. You will need to interact professionally with people from all these groups. In addition, much of your work takes place in your clients’ work settings. This means almost everything you do will be visible and under the scrutiny of your clients. Because PFs often start as outsiders, you must earn credibility in the practice. This places unique demands on you as a PF. Finally, most of your work will take place outside your office and you will often work almost as an independent agent. Because of this, the need for professionalism is even greater. Responsibility will fall on you to make sure that you implement the intervention model your program uses with fidelity and communicate with your leadership about any modifications you believe are necessary.

There are a variety of rules and behaviors you will want to follow when you are working in practices. These include:

1. Professionalism in Personal Behavior
2. Professional Interactions with the Practice
3. Maintaining Professional Relationships
4. Professionalism Within Your PF Program
5. Commitment to Continuous Learning and Professional Development

While many of these principles may seem self-evident, it is helpful to review them before you start working with your practices.

### Professionalism in Personal Behavior

**First impressions matter.** Most often you will be entering a new practice as an unknown, and one of your first tasks will be to build trust, confidence in your abilities to work with a practice, and interest in what you have to offer. The first impression you create is an important part of building rapport with a practice. For this reason, it is important that you pay attention to how you represent your skills to a practice, your attire, and your timeliness. Each of these communicates who you are to a practice and shapes their initial impressions of you.

**Know your skills and experience and be transparent about them.** PFs will vary in their skills and levels of experience. While all PFs are expected to have basic skills in quality improvement (QI), work with practices may require additional skills, depending on the goals of the intervention and the needs of the practice.

You will want to accurately assess and represent your skills to the practices that you work with. It is important to be transparent about what you are able to offer and what other skills the members of your larger PF team have. Being transparent about these skills will build trust, help you manage practice expectations, and help practices know where they might best engage you as a resource. Since even a novice PF can bring value to an advanced practice, being transparent about your skill and experience level does not mean being apologetic about your abilities.

It is important to think strategically about what a practice needs, how this fits with your skills, and how you might engage your PF teammates to fill any skills gaps. In instances where your knowledge and skill are not to the level needed by a practice, you can become a co-learner with members of the practice by finding training opportunities for them that you also participate in. A core skill of a PF is to be a “switchboard operator.” You may not know *how* to do something, but should know *who* in the community might be able to help or how to locate this type of individual or resource for the practice.

For example, if your practice needs assistance with empanelment and you lack this skill, you might engage an outside expert or arrange for the practice to participate in a training on empanelment that you also attend and then assist them in implementing their new knowledge in the practice. For example, Vermont’s Blueprint for Health co-trains practice facilitators and their practices on key concepts of patient-centered medical homes (PCMHs), and then the PF returns to the practice to assist members in implementing what was learned at the training. More information is available at

[http://pcmh.ahrq.gov/sites/default/files/attachments/Vermont\\_020413comp.pdf](http://pcmh.ahrq.gov/sites/default/files/attachments/Vermont_020413comp.pdf)

*Key points on assessing and communicating your skills and experience:*

- Accurately assess your skills and experience.
- Communicate your skills and experience to practices and your own organization.
- Consider a co-learner approach.

**Dress appropriately.** There are common dress codes in health care settings that you should adhere to. It can be helpful to read the practice’s employee handbook regarding its dress code, observe the dress of clinicians and other practice staff, and ask your main contact at the practice about any rules regarding dress you should be aware of. A rule of thumb you can use to determine appropriate dress is to dress similarly to the office manager.

Like it or not, you will be judged in part by your appearance. Your dress should always be professional and neat. In general, you will want to adhere to the dress code of the practices you are working in. Ideally, your attire should enable you to blend in to the professional crowd rather than stand out. But be aware of how your attire can send messages to patients and staff. Overly formal dress in an informal setting can set you apart. In some instances, this can be positive, helping to enhance your credibility (for example, in a first meeting with a practice). In other cases, this can make you appear out of touch or solidify your outsider status. Your goal is to be appropriate in your attire, matching it to what is usual in the practice setting.

*Key point on dressing professionally:*

- Adhere to the practice's dress code.

**Be on time.** One of the first opportunities for you to demonstrate professionalism is to be on time for meetings and appointments. Not only is this an important part of professionalism, but it is also an important way to build trust and credibility with a practice. You will discover that practice staff and clinicians often are not able to be punctual. The demands of patient care often make it difficult for them to stay on time. Patient visits may run late; emergencies will happen. In addition, they may not consider the work you are assisting with to be a priority and may communicate this by running late. Do not take this as permission for you to reciprocate in kind. Whether they are punctual or not, you must be committed to maintaining professionalism by showing up on time, even if this means you will be waiting. Be flexible. Work around the schedules of the practice staff and clinicians. Later, as you build a relationship with the practice, you may decide to use their chronic lateness as a means for having a staff member or clinician reflect on any ambivalence about the process, the culture in the organization that enables chronic lateness, and other challenges such as understaffing or clinical staffing emergencies that make it difficult to attend on time.

A good way to prepare for and manage waiting time is to arrive prepared with other work tasks. Since PFs can anticipate that clinicians may be running late and that there may be lag time between encounters, you will want to use this opportunity to document encounters and work on other practice facilitation tasks.

You should also consider arriving early for meetings. Arriving early gives you time to set up and provides an opportunity to address any last-minute tasks. Over time, establishing this as part of your routine can build a positive impression of commitment and accountability to others. This also provides the opportunity for “water cooler” conversations and chance encounters in the hallways with practice members.

These accidental encounters can be a very important way of obtaining additional information about a practice, learning about important concerns, and also building relationships. For example, a PF working with a Federally Qualified Health Center to “fix” their empanelment process discovered what was creating the problems through casual observation of a staff person one day when she was passing through the building. This observation led to additional study, identification of the underlying cause, and a successful re-launch of empanelment by the practice after two previous failed attempts.

*Key points on punctuality:*

- Be flexible and sensitive to practice staff and clinician schedules.
- Go prepared with other practice facilitation work to complete while you are waiting.
- Consider arriving early.

## Professional Interactions With the Practice

In addition to your general comportment, you also signal your professionalism and reliability by the way you interact with your practices. Keep in mind that the impression you create with your practices will reflect not only on you, but also on your larger PF program. In most cases, you will begin work with your practices as an outsider. Your credibility will be based on the reputation of your employer. Often someone from your PF program already has an existing relationship with the practice and can introduce you to key personnel there. This helps create some initial credibility for you as you begin your work with the practice. However, the basis of the practice's assessment of you will quickly shift to a judgment of your actions, and this will begin with their observations of your reliability, consistency, and how well you recognize their basic rules of etiquette and operation. As a practice is getting to know you, you will want to identify yourself to them. This is an easier process in a smaller practice; in larger practices, it can take weeks, sometimes months, until people begin to recognize you. You will want to be respectful of practice resources and follow proper rules and etiquette in meetings, when using workspaces and practice resources, and when parking. These issues may seem inconsequential, but poorly considered moves on these seemingly small items can have big effects on your reputation and the practice's receptivity to you.

**Announce your arrival and departure and clearly identify yourself while on site.** Out of professional courtesy, be sure to inform the practice of your arrival. In an ideal world, you will visit each practice on a regular and predictable schedule. A common schedule for PF programs is half-day a week during active intervention periods. When you arrive for your routine visit, you still will want to “make the rounds” and let people know you are on site. If you are consistent, they will anticipate and prepare for your visit.

In addition to reminding staff members of your work at the practice, announcing your visit allows them to keep track of your time at the practice. They may do this either informally or through a sign-in sheet. As the staff becomes more familiar with you, they will begin to seek you out. Letting them know you are on site makes that easier. You should also announce yourself for ad hoc visits, again out of professional courtesy.

Announcing your departure serves a similar function. Let the team members you've been working with and your primary point of contact know when you are leaving. This supports continued relationship building with a practice and gives you one last opportunity to connect with practice members during your visit. You can also use this as an opportunity to remind them when you will be back for a next visit and begin planning for this. After a long day (and a drive home ahead), it can be tempting just to slip out the back door. Taking the time to say goodbye (just like saying hello) can be an important step in building rapport with practices.

During your time at the practice, consider wearing an ID badge that indicates your name and your PF program. This helps signal your role to practice staff and clinicians, and helps them associate your face and presence with PF work. In larger practices with many consultants coming

and going, it is especially important to identify yourself clearly, which will help practices remember you and why you are there.

*Key points about announcing your arrival on site:*

- Notify practice staff whenever you are on site.
- Touch base when you are leaving as a way to continue to develop relationships.
- Wear an identification badge, if appropriate.

**Get to know clinicians and staff.** Another important part of building relationships in a practice is getting to know the staff and clinicians you are working with on both a professional and personal level. While it is important to maintain professional boundaries, showing interest in and remembering important personal information about practice members' hobbies, important life events, and family can go a long way towards building relationships. If the practice manager has a new grandchild and you remember her name and ask about her each visit, you will soon become a favored visitor.

When you first start working with a practice, it may be useful to create a map of the practice that shows where each staff person and clinician works. It can also be helpful to create an index card or e-record (perhaps in your contacts program) that contains the individual's name and important information about them. Because you may be working across many practices with many different individuals, you can use these to help you remember important details about each person in a practice you work with to support development of trusting relationships with practice members.

*Key points in getting to know practice members:*

- Create a map of the practice showing where key staff and clinicians work.
- Create index cards or e-records for each staff person and clinician you will be working with, which you can use to help you remember this information in future visits.
- Maintain appropriate professional boundaries but also get to know and remember important events, like the birth of a grandchild or other significant event, in staff's and clinicians' lives to help build relationships.

**Use practice resources sparingly.** Practice staff often will go out of their way to provide resources to the PF. It is up to you to demonstrate professionalism while on site and use these resources responsibly. For example, you should limit activities such as using their printers and copiers. If you need to make last-minute copies of agendas, you should plan to replace the resources you use. Ideally, paper documents should be brought into the practice preprinted. Always clean up after yourself. If you need to make personal calls or calls related to another practice, use your cell phone; limit internal phone use to issues specifically for the practice. Food and beverages should only be taken when offered, but you may also need to set limits on a case-by-case basis. In fact, you may want to consider bringing small gifts to staff as a way to communicate your interest and care for them and their work. A basket of cookies or the occasional box of donuts can help build relationships.

*Key points regarding using practice resources:*

- Come prepared with your own resources and equipment.
- If you do use practice resources, be sure to keep consumption to a minimum.
- Return the favor when possible.

**Keep meetings professional and distraction-free.** Avoid using devices such as cell phones or computers that may create distractions during meetings unless they are an explicit part of the session. These devices can distract the user and also signal a lack of engagement in the meeting proceedings to those around you. Even taking notes on a laptop can give others the impression that you are distracted. Others may not know this is what you are doing, and the noise of the keyboard can interfere with discussion. Using paper and pen to take notes is much less distracting and therefore usually preferred.

*Key point regarding electronic devices:*

- Avoid using devices that create distractions at meetings

**Be considerate with workspace and parking at practices.** Workspace is an important consideration when entering a practice. Your site workspace is the physical space you will use to complete tasks related to the practice's practice facilitation intervention. Often, your workspace will change from visit to visit. Regardless, most of the time any workspace assigned to you is not actually yours and will likely be shared with others in the practice. PFs can expect to work in shared cubicle spaces, empty conference rooms, lunchrooms, waiting rooms, or sometimes even in their car in the parking lot. Come prepared to set up a portable workspace (that is, a fully charged laptop with Wi-Fi access). Be sure to confirm with the office manager or practice staff that the space you intend to use is available and appropriate for you to occupy. Always leave your workspace in the same condition in which you found it.

You will probably be working alongside other practice staff. Once you set up your workspace, you will need to be mindful of your surroundings and the people in them. For example, if you are working in the lunchroom; do not take up additional space by placing your computer bag in an empty chair. Be mindful of noises that will distract others. If you need to make calls, be sure not to disrupt others. If you need to make or receive a call about something unrelated to the work at the practice, step out of the building to take the call or defer it for a later time. Taking calls for issues other than those in service of the practice at hand sends a message that you are not giving their practice your full attention and commitment.

Remember, you are entering the practice space as a stranger, and the staff often will inquire why you are there and be curious to find out what you are up to. Be prepared to answer these questions. Be friendly and introduce yourself. Then let them know which project you are working on and with whom. Be sure to follow your response with a reciprocal question. Ask the staff member his or her name and role in the organization. You will soon find yourself building relationships.

Parking can be a surprisingly thorny issue for PFs. Some practices have plenty of parking and there will be no problems with parking on site. Others have very limited space that they need to reserve for their staff and patients. If you are working with safety net practices, you may be in areas of town that are not safe and where it may not be wise to park or walk on the street. Be sure to check with your primary contact about where you should park before you arrive at the practice for your first visit. As a default option, always park away from the main entry or even on the street, if it is safe, to save the parking spaces for patients and staff until you are clear on where you should park.

*Key points regarding workspace:*

- Station yourself wherever space is made available.
- Do not take calls unrelated to the practice you are visiting.
- Respond to practice staff inquiries and be friendly.
- Prior to your arrival, ask where you should park.

## **Maintaining Professional Relationships**

You will interact with many different types of people as you work with a practice: practice staff, clinicians, external consultants, patients, other PFs, and your own program staff. It will be important that you interact professionally with this diverse range of audiences and partners.

As you begin working with a practice, you will want to help the practice members get to know you. This helps build relationships and create the trust you will need to support the practice in improvement work. You should introduce yourself in a way that helps the staff person build a solid professional connection with you. When you are introducing yourself to staff persons such as clerks and medical assistants, you can share aspects of your professional development and work that are most likely to connect with them; this will also help them see that you understand the type of work they do and the challenges they face. You might share experiences you have had in the past with other clerks or medical assistants and what you have accomplished (protecting confidentiality, of course). Do not emphasize areas that might create barriers. For example, do not mention that you have a Ph.D. if you think this might create a barrier with the staff. On the other hand, this might be appropriate and even useful to share with clinicians or practice leadership.

**Learn the names and roles of practice staff and clinicians.** Learning and remembering the names and roles of individuals at the practice can take you a long way in building relationships and establishing yourself as an effective professional. Be able to look someone in the eyes and call them by name or—even better—remember important information about them that they may have shared with you. Create a notebook, index cards, or other digital documentation for each practice to record descriptions and names of staff members, making sure to update it as necessary. These files can contain project information for each participant in the practice. This will be a helpful tool for both you and your team.

*Key points regarding remembering practice staff's names and roles:*

- Remember names and roles as an important part of both establishing relationships and your presence as a professional.
- Use a notebook or other methods to record names, information, and location of practice staff.

**Interact professionally with consultants at the practice.** You may encounter other consultants who are working with the practice at the same time you are. These may include information technology (IT) staff or a QI consultant with specialized knowledge in a particular area, such as electronic health record implementation. You will want to extend professional courtesies to these individuals. Often the items they are working on are relevant to the work you are doing with the practice. Introduce yourself. Explain your role. Ask about the work they are doing and explore any synergies. Provide them with your business card or information on how to contact you. You may want to get their information as well, in case you need to reach out to them.

At the same time, you should balance the importance of establishing communication with them with appropriate interpersonal boundaries. You will want to clear any proposed involvement or work with your primary contact and practice leadership. Practices often contract with consultants for a limited scope of work, and additional time spent with your team could result in unexpected charges. In addition, you will want to maintain appropriate boundaries with the consultant. Avoid the temptation to gossip or become overly familiar, even in stressful situations.

*Key points on working with a practice's consultants:*

- Interact professionally.
- Introduce yourself and explore any synergies in roles that you might be able to leverage to support the practice.
- Maintain appropriate interpersonal boundaries.

**Interact professionally with patients and their families.** While most of your interactions will be with practice staff and clinicians, you may also work with patients and their families. Patients and their families are the customers who should be at the center of any improvement work. They are an important source of information about a practice and can serve as “partners” to you in QI interventions and facilitation. All PF work should include engagement of patients and families in improvement activities.

One important way to collect information about a practice is to observe a health care visit from start to finish. Shadowing a patient through a visit should be a habit you develop as a PF, as it allows you to learn a great deal about a practice. Other ways you may interact with patients include collecting or reviewing survey data about patient satisfaction, experience, and needs; interviewing patients; and conducting focus groups of patients.

In general, you should never approach a patient before you have received permission from your primary contact and practice leadership. Once you do, you should apply the same principles of

professionalism that you use in the practice to these encounters. Whenever you interact with patients, you should introduce yourself and provide a brief explanation of your role. For example, you might say: “Hi, my name is Samantha. I am a practice facilitator working with the practice to help them improve patient experiences when they come here. Could you share some of your thoughts about the practice with me?”

Your communications with the patient should be respectful and efficient. You will want to make the patient feel comfortable and listen carefully to their input. Observe appropriate boundaries with patients. Do not share negative information about the practice. Defer patients’ questions to their primary care clinician or another appropriate staff person if they have a specific question about the practice. If you defer their questions to the clinician or another staff person, be sure you alert the clinician that the patient has questions he or she would like to discuss.

When working with patients or practice members from cultures, backgrounds, or experiences different from your own, you should familiarize yourself with cultural norms of communication and recognize that these may be different from yours. Remember to be attentive to cultural norms and linguistic preferences.

*Key points on patient interactions:*

- Interact with patients only after you have permission from the practice leadership.
- Introduce yourself and your role at the practice to the patient.
- Avoid sharing negative information or making negative statements about the practice.
- Refer patients to their clinician or other staff person if they have questions you cannot answer or do not feel it is appropriate for you to answer.
- Whenever possible, make the patient feel comfortable by using their preferred language.

**Maintain professional boundaries.** As you establish working relationships with clinic staff and clinicians, you should minimize socializing outside of work with staff and clinicians. Socializing can intrude upon your ability to remain objective in your work with the practice and lead to difficult interpersonal situations. There are, of course, exceptions to this rule. Some events, such as fundraisers for the practice, are appropriate to participate in to show support for the practice.

Avoid all comments that can be viewed as sexual, gender biased, or racially/ethnically biased. Do not participate in discussions with staff and clinicians that contain this type of dialogue. Always be cautious with physical contact, such as hugging. Some individuals are uncomfortable with this type of contact and view it as unwanted touching and harassment.

In the event that you experience unwanted physical contact from someone at the practice, you should make it clear that this is unwanted and ask the individual to stop. In these cases, you must report this immediately to your supervisor for further direction and support. Depending on the severity of the issue, the supervisor can work out this issue with appropriate clinic authorities. In these instances, it can be especially awkward or difficult for you to confront such an issue, especially when you are attempting to establish work-related relationships. PFs should always

remember that their safety is important, and they should address any unprofessional interactions by others (and let their PF supervisors know immediately about these issues).

*Key points regarding maintaining professional boundaries:*

- In general, do not accept non-work-related invitations or fraternize with staff outside the practice setting.
- Be careful with physical contact, and recognize that some individuals may misinterpret or misconstrue such contact.
- Report inappropriate behavior to your supervisor, and ask the individual engaging in these behaviors to stop.

**Maintain professional objectivity.** As you begin to establish your professional relationships at clinics, you will need to exercise distance and objectivity. Distance and objectivity allow you to do your work. The fact that you are external to an organization is part of your power as a PF. You are able to observe the practice and its operations separate from internal politics and entanglements. The moment you begin to lose objectivity and get drawn into internal office gossip and politics, you become less effective and less of a resource to your practice. In the extreme, you can actually begin to contribute to the problems, solidifying dysfunctional interaction patterns. Personal entanglement will make it challenging for you to make the difficult calls and have the difficult conversations. At the same time, your success as a PF is based on trust and building a relationship with a practice.

You will need to balance these contradictory issues in order to work effectively with practices. Because practice facilitation work is relationship driven, and PFs are often naturally empathic, it can be easy for a PF to get entangled into the politics of a practice. Avoid this. It will render you much less objective and useful to the practice. This will require self-restraint and discipline. Ask yourself: “How will the information shared and the information I communicate help me help the practice reach its improvement goals?” If it does not help, it is best to leave it alone.

*Key points for maintaining professional distance and objectivity:*

- Be aware of the ease with which PFs can lose objectivity and become too enmeshed with a practice.
- Use self-assessment to monitor this and prevent it.

**Keep internal information about the practice confidential.** Professionals hold themselves accountable for their words and actions, especially when they have made a mistake. Such personal accountability is closely tied to honesty and integrity, and it is a vital element in professionalism. Throughout your encounters with practice staff, you will come across private information about the practice. For example, you will inevitably see site performance data that may or may not be favorable to the practice and its work. You may also discover through staff chatter that a key staff person is resigning, or you may find out that the practice reached National Committee for Quality Assurance Level 3, the top level, on PCMH recognition. Whether the information you gain is factual, hearsay, through observation, or even seemingly good news, it is

crucial that you keep these discoveries to yourself, unless otherwise publicized. It is in the PF's best interest for you to exercise professional behavior and avoid sharing information about the practice, whether negative or positive.

Always be sure to avoid critiquing or denigrating other practices, as you will be construed as someone who gossips and fails to maintain the privacy of other practices. This type of unprofessional behavior will get in the way of good relationships with members of the practice.

As a rule, you should follow the same rules of confidentiality and privacy about your practices and their internal issues and workings that you would for patients. You should not share internal information about a practice with others, except with your PF team members and staff. The information you share should lead to improving support to the practice and be provided in a spirit of respect and professional care.

Occasionally, you may encounter a practice that asks you to sign a non-disclosure agreement (NDA). NDAs require that you do not reveal certain information about the practice without explicit permission and approval. Practices may ask for these when they have developed a unique process or program that they believe gives them a competitive edge, or when they view certain information as proprietary. These types of requests need to be handled by your organization's program director and supervisor. You can thank the individual making the request, ask for a copy of the agreement, and let them know that your program director handles such requests and will be in contact about it.

*Key points about maintaining practice confidentiality:*

- Do not speak negatively with others about any of your practices.
- Do not share internal information about a practice with anyone except your PF team members and program staff.
- Engage your organization's program director and supervisor if the practice requests an NDA; this is a program-level issue.

**Obtain permission to share “exemplar” workflows you have identified at the practice.** As a PF, you may observe some promising elements from one practice that you might want to share with other practices. For instance, you may observe a specific process from a disease management coordinator in his or her daily routine for preparing lab reminders that can help another coordinator at a different practice. Or you may encounter a practice manager that has generated telephone-visit brochures and strategically placed them in the patient waiting and exam rooms. As an active observer, you will want to make note of these practices, as they may help in your work with other practices. In these instances, you will want to ask the practice manager/coordinator whether it is permissible for you to share their “exemplar” workflows and processes with other practices. You will also want to ask them if they would be open to a site visit from practices that are interested in replicating their processes. While verbal permission for observations is usually sufficient, you will need to obtain written permission for documentation

sharing. Most practices are open to and find it rewarding to have the opportunity to share the good work they are doing with others.

*Key points on sharing information:*

- Before sharing information about best practices you observe, confirm that the practice has agreed to this (this agreement will often be discussed during the kick-off meeting and initial paperwork completion).

**Respect lines of authority at the practice.** Professional behavior includes respecting the lines of authority at the practice. Upon entering a practice for the first time, make sure that you become familiar with the organizational chart and lines of report. In most instances, you should start your discussions with your primary point of contact, usually called your practice champion.

Avoid circumventing your practice champion's reporting lines and going directly to his or her director. Any communications at that level should be coordinated with your practice champion. Otherwise the champion may view this as compromising his or her position, and this will introduce distrust into your relationship with them. However, there may also be instances where you will need to circumvent established reporting lines—and this needs to be handled delicately. This may occur when a project gets stuck, a practice champion repeatedly fails to follow through, or you observe unprofessional behavior. When you believe this is necessary, it is time to engage your supervisor and program director to discuss the issue and seek their assistance and advice.

Following lines of report is also important when clearing work you are doing for a practice with your own PF program director/supervisor. There may be times when you are asked to take on tasks that you are unsure about. Sometimes it will be okay to take on additional tasks that fall outside your original goals and scope of work; in other instances, it may not. If you are unsure, you can use statements like, "That sounds interesting, but I'll need to check with my supervisor" to respond to the practice member. Then you can check with your supervisor and get back to them. Having a statement like this at the ready can help buy you time (and get additional input) on tasks that you're uncertain about, while remaining respectful and supportive to the practice member.

*Key points for respecting lines of authority:*

- Know the reporting lines for the practice.
- Respect these lines and coordinate with your practice champion when you need to engage leadership.
- When you need to engage leadership without the support of your practice champion, do this in collaboration with your supervisor and program director.
- Have a plan for dealing with requests from practice members that you are unsure are appropriate for you to engage in.

**Communicate judiciously with your practices.** As a PF, you will have many reasons to communicate with individuals at the practice. You will want to manage these communications professionally and monitor them so the staff does not feel overwhelmed by them. This is a balancing act: you need to strike the right balance with open, frequent, and persistent communication, while being careful not to overburden or annoy practice staff. You can cluster questions for a practice in one email, rather than sending multiple inquiries. Focus on keeping your emails succinct; you can elaborate on details as needed during calls or in-person visits. In addition, written communications should be professional, well crafted, and without any spelling errors or slang terms. Phone messages should be similarly professional in content.

*Key points regarding length and number of communications:*

- Consider and limit the number of times you reach out to communicate to practice staff.
- Consider and limit the length of encounters and messages.

**Interact professionally with difficult personalities.** Practice facilitators will find themselves working with a variety of personalities. Some may be outgoing and easygoing. Others may be stressed, unfriendly, isolated, complaining, controlling, or display any number of unpleasant traits. Either way, addressing the needs of each of these personalities will take some interpersonal skill and practice. This requires patience. It is important to be able to depersonalize this behavior and recognize that these behaviors are not “being done to you”; they are simply “being done.” Effective PFs often need a “thick skin” that helps them deal with criticism and other difficulties.

No matter what the communication, remind yourself that you are interacting with a human being, and humans require some level of nurturing and space to develop. Remember that you are a visitor, and as such you are not fully aware of the history and reasons people feel and behave as they do. Nor do you need to have this information.

Some skills that can help you in managing these interactions include:

- Listening actively to the other individual.
- Acknowledging and honoring the different opinions expressed by the individual.
- Recognizing the other person’s feelings and concerns as valid.

For more information on these skills see the National Health Service Leadership Academy’s Healthcare Leadership Model. Available at:

<https://www.leadershipacademy.nhs.uk/resources/healthcare-leadership-model/>

Even with good command of these competencies, you will encounter difficult personalities and will need to deal with them. Some suggestions and tools for working with difficult personalities are provided in [Appendix 7C](#).

*Key points regarding interacting with difficult persons:*

- Depersonalize behaviors and comments to help you stay objective and calm when working with difficult personalities.
- Follow a set of prescribed steps to help you navigate work with difficult personalities.

**Special considerations for professionalism in virtual facilitation.** Virtual practice facilitation presents some unique challenges in the area of professionalism. In addition to many of the items discussed above, maintaining professionalism during virtual facilitation involves some additional considerations.

Virtual PFs interact with practices through video conferencing, email, phone calls, and other electronic means. You will need to consider how and where you will conduct these calls and get information on the practice members' location and resources. Background noise at both locations must be considered, as well as privacy issues. If a webcam is being used, be sure the background and your attire are both professional. In the case of virtual facilitation you will also need to consider time zones and time differences. Be respectful of these and do your best to work around clinics schedules.

Virtual PFs will want to have much more rapid response times than in-person PFs, whose response times are more scheduled. A quick or immediate response sends the clinic a message that they matter and that you are responsive to their needs. If you provide useful responses immediately, you will build a reputation as a valuable resource.

Additionally, virtual facilitation often makes it difficult to build a network of contacts within the practice. In some instances, you may be confined to a single point of contact. If this individual is not available, then it becomes impossible for you to provide support or help move the practice forward. For this reason, you will want to build a broad network of contacts in the practice. This might include the leadership, the practice manager, a medical assistant, a nurse, your key point of contact, and the IT person, among others. If possible, you can establish this with a site visit at the start of the intervention. Be especially mindful about getting everyone's business cards and contact information. You can continue to build a network through "snowball sampling"—asking each individual who else they think would have resources to add to the project. In this way you can expand the resources available to your site champion as he or she carries out the work on site. However, before using a snowball approach, clear this with your practice champion and be sure that you respect the culture and lines of authority at the practice. You want to avoid appearing to undermine the practice champion. In the same way you would handle in-person visits, keep a notebook of persons, personalities, roles, responsibilities, and contact information.

*Key points regarding virtual facilitation:*

- Wear professional attire when using a webcam.
- Consider the background view and noise of the web conference or call.
- Accommodate clinic schedules, including time differences.
- Increase your response time compared to in-person facilitation work.

- Use “snowball sampling” or an initial site visit to build a network of contacts at the practice.

## Professionalism Within Your PF Program

In addition to the professional behaviors listed above, you will need to apply professionalism within your own PF program. This includes being sure that you are informed of and adhere to your program’s policies and procedures; that you use the resources provided to you for your work in the field; and that you interact professionally with program leadership, staff, and fellow PFs. Behaving professionally will facilitate a positive work climate, promote teamwork, and help assure that the intervention model is implemented with fidelity. Some important areas of consideration are described below.

**Adhere to your PF program’s policies and procedures and intervention design.** As a PF, you work independently up to 90 percent of your time. Thus, it is particularly important that you adhere to your program’s intervention model or approach, as well as its policies and procedures for interacting with and reporting progress with practices. Failing to do this can greatly weaken the effectiveness of your PF team and your program overall. Be sure that you understand the intervention model your program is working with or the approach you are being asked to use. If you do not understand it, or do not agree with it, take responsibility for meeting with your supervisor and program leadership to discuss your concerns. As you work in the field, you may discover new issues with the intervention model. For example, you may find that a particular approach is not working in the practices because of a change in reimbursement. Or it is difficult to adhere to your program’s requirement that you update practice records before you leave the site because there is no physical space in the practice for you to do this, and you are in an unsafe neighborhood so it is not wise for you to do this in your car. It is your responsibility to bring these issues to the attention of leadership and work with them to generate alternative solutions.

*Key points on professionalism in your PF program:*

- Adhere to your program intervention model/approach and its policies and procedures.
- Bring problems with both to the attention of your supervisor and program director.
- Offer a solution for each problem you bring and help your program leadership address these problems.

**Use your PF program resources effectively.** As a PF, you will need a variety of resources to do your job. As a professional, you will want to make optimal use of these resources and to communicate with your supervisor and director about the resources that you need but do not have access to in order to do your job. Some of these resources include:

- *Tracking and reporting systems*—Documentation is the key in supporting your fieldwork and assists in delivering reports. Be sure to allot time during your day to document tasks completed for every practice site. Documentation should be done in a timely fashion—ideally within 24 hours of an encounter, if not sooner. In an ideal world, you might make

these notes prior to leaving the practice or while still in the practice parking lot. Many PFs use their cars as a moveable office. Delays in entering information can affect your PF team and program staff, as they may rely on this information to know what is needed next at a particular practice, to determine resources that PFs need, or to devise the content of upcoming PF trainings.

- *Electronic mailing lists*—Your PF program may use an electronic mailing list to enable you and your fellow PFs to ask questions, share resources, and communicate best practices with one another. The program may also use it as a way to keep your supervisor and PF program director informed of issues as they arise in the field. They are only useful to the extent you and your fellow PFs use them. Before you use the electronic mailing list, be sure you know its purpose and function and who will have access to the information you post on it. Keep communications professional and participate regularly.
- *Computers, cell phones, and other supplies*—Be responsible for these supplies and keep them in good condition.
- *Staff support*—Your program may provide support staff to you and your teammates, such as data management staff and administrative support. Make appropriate use of these resources and maintain professional behaviors with these staff persons. They are key members of your PF team.

*Key points on using program resources:*

- Complete documentation in a timely manner.
- Regularly share ideas and resources with your PF partners on program electronic mailing lists and other shared spaces.
- Maintain your supplies in good working order.
- Engage program staff appropriately to support your work, using the same professionalism you apply with your practices.

**Communicate your schedule to your PF team and staff.** It is important to keep your PF program staff aware of your location and visit schedule for each week. Again, this is a professional courtesy and a responsibility to your PF program. If you are working as a member of a PF team, your teammates will need to know your schedule so they can coordinate their work with you. Your supervisor or program director may have items they need you to address with a particular practice, and it helps for them to know when you will be on site to assist them with these issues. Your program will most likely provide you and the rest of the PFs with a shared calendaring system that will help you coordinate visits and work. If not, you may want to ask your PF program director about making a resource like this available. You will want to make sure you keep your calendar accurate and updated so that others can view it and trust the information that is contained in it. It can help to include a brief statement of the focus of the visit. This can also help your PF teammates stay in touch with and coordinate with your work.

*Key point regarding visit/work schedule:*

- Keep your calendar updated and accurate to help your PF team and staff coordinate with you in the field.

**Interact professionally with your supervisor and program director and keep them informed.** As a PF, you are responsible for conducting yourself professionally and engaging in open communications with your supervisor and program director. Be aware that PFs can easily become so involved in their work with their practices that they feel more connected to their practices than their own PF program. When this happens, it can be easy to slip into an “us versus them” mode of thinking—especially when your program director has to make decisions that may interfere with some of your work with your practices.

It is important to resist this impulse. The fidelity and strength of a practice facilitation intervention and the work of its PFs are dependent on effective communication, training, work coordination, and idea sharing. Remember, the leadership for your PF program relies on the information you share to make organization-wide decisions about intervention designs, funding, resource allocation, and training.

You are responsible for behaving professionally with your supervisor and program director. Come to meetings prepared and ready to contribute. Complete documentation about your practice encounters and success or difficulties in delivering the PF intervention on time. Take responsibility for contacting your supervisor between sessions when there is an urgent need.

Another issue that you may encounter is conflicts in reporting that arise when you are working on multiple projects with a practice or set of practices. This can lead to the situation of having multiple “bosses” that you report to, depending on the improvement project involved. This can create conflicts when project directors give conflicting directions. While this is an issue that your PF program leadership should manage, you will want stay aware of the challenges this can create for your work and communicate any problems that arise to the program managers and PF program leadership team. The same also holds for communicating opportunities you identify for collaboration across the different projects that project managers and PF leadership may have missed.

Finally, it is your responsibility to alert your supervisor if you need additional resources to do your work or if you need to brainstorm solutions for challenges you are encountering. When bringing up challenges, it can help to come prepared with an idea for a solution for each problem you raise. This can help you maintain professionalism even when you bring up difficult internal program issues.

*Key points on professional behavior with your supervisor and program team:*

- View your program office staff and supervisors as a team and resource.
- Report regularly to your supervisor through meetings or internal communication systems, and always arrive prepared.

- Keep supervisor and leadership informed of major events.
- Communicate any conflicts that arise across projects as well as possible opportunities for collaboration.
- Be responsible for communicating problems and resource needs to program leadership and assisting in identifying solutions to internal programmatic issues.

**Interact professionally with your fellow PFs.** Practice facilitation is a “team sport.” Fellow PFs are some of your best resources for good ideas and for support. They are a central part of your team. You will want to maintain professional behavior with your fellow PFs. All the rules outlined above also apply to your interactions with fellow PFs.

An important part of professionalism is sharing “exemplar practices” and resources you encounter in your work. To do this, you will need to document these things in your encounter notes and in your personal notes in a way that you can locate them easily. As mentioned above, many PF programs provide electronic mailing lists or other means for PFs to communicate with each other while they are in the field. It is your responsibility to use these sources to communicate your observations and resources to your fellow PFs. You are never in competition with them.

Come to supervision and training meetings prepared and ready to participate. Share with your fellow PFs the lessons you have learned and the problems you are encountering. This will help them learn from your experience and help them feel supported as they work with their practices.

*Key points regarding interacting with fellow PFs:*

- Apply the same rules of professionalism with your fellow PFs as with your clients.
- Make a habit of documenting and sharing good ideas, exemplar practices, and resources with your fellow PFs.
- Come prepared to actively participate in supervision and trainings.
- Be willing to share the challenges you are encountering and your lessons learned, with other PFs in your program.

**Conduct your own internal continuous quality improvement process.** In the same manner that you are assisting practices to continually evaluate and improve their performance and processes, you will want to do the same with your own PF work and professional processes. You should develop a process for evaluating your own performance with your practices and how effective you are in helping them attain their improvement goals.

While your PF program is likely to provide resources to help you do this as part of the program’s internal QI process, you can create a personal process to monitor and continually improve your own professional abilities and effectiveness. An easy way to do this is to set professional development goals and then regularly assess your progress towards achieving them. You can apply the PDSA cycles that you teach practices to the development of your own professional skills and processes (for example, running personal PDSA cycles to test a new approach to

documenting your encounters with a practice or convening and coordinating the work of your PF teammates if your program uses a team-based PF intervention model). You can gather informal feedback from your practices on your work with them—including where they believe it is the most effective and areas they think could be improved—and then use this feedback to guide your own professional development.

If your PF program does not have a formal process for assessing the quality of work by its PFs, you can encourage your supervisor or program director to consider soliciting feedback from practices about work with their PF through short on-line surveys completed monthly or quarterly, or through informal conversations with practice leaders. While it can be uncomfortable to receive this type of feedback, it will help you continue to develop professionally, and also keep you “in tune” and more empathetic to your practices who are helping to develop and use similar QI processes. In an ideal world, your own professional work mirrors what you then teach your practices to do.

*Key points regarding your own internal quality improvement as a professional:*

- Conduct regular assessments of your professional skills and processes.
- Set personal goals and monitor your progress towards them.
- Use QI processes similar to those you are teaching your practices to guide your own professional development.
- Encourage your PF program director to implement routine feedback on PF work to support PF professional development and the overall quality of the program.

Commit to continuous learning and professional development. Like any professional, you should be committed to a program of continuous learning and development of your own knowledge. You will want to stay abreast of changes in the field of healthcare—for example, new things on the horizon, such as health service models, requirements around meaningful use, and changed thinking around chronic care. Annual performance evaluations are a good time to reassess your skills. Many programs will have you complete a professional assessment each year as a way to guide their training program and support your professional development. If your program does not do this, you can do it on your own. You can use each of these opportunities to identify areas in which you can continue to develop and grow as a professional. Consider attending professional conferences and trainings to expand your skills and take advantage of trainings offered through your program. Not only does this help you become increasingly more effective as a PF, but it can also keep the field alive for you and help stave off burnout. A list of some resources for continuous learning is provided in [Appendix 7B](#).

*Key point regarding continuous learning:*

- Continually seek out additional training and education to enrich the skills and resources you can provide to your practices.

**Maintain HIPAA and other certifications and adhere to their requirements.** As a PF, you should complete Health Insurance Portability and Accountability Act (HIPAA) certification and

maintain this certification a part of your ongoing professional development and continuing learning. There are numerous online training programs on HIPAA that provide certificates. These typically charge a small fee for this service. Your supervisor is likely to have identified a source for you to complete to obtain your HIPAA certification. If not, you can find one online by using an online search. Additional information about HIPAA and online training is available from the Federal website <http://www.hhs.gov/ocr/privacy/hipaa/understanding/training/>.

You will work with patient data as part of your work with practices. Be stringent in assuring you adhere to HIPAA regulations.

### **Table 7.1 Technical safeguards section of the HIPAA Security Rule**

<ol style="list-style-type: none"><li>1. Access Controls. A covered entity must implement technical policies and procedures limiting access to systems containing electronic protected health information (ePHI) only to personnel with sufficient access rights (§ 164.312 (a))</li><li>2. Audit Controls. A covered entity must implement software that record and examine activity in information systems that contain or use ePHI. (§ 164.312 (b))</li><li>3. Integrity. A covered entity must implement policies and procedures to protect ePHI from improper alteration or destruction. (§ 164.312 (c))</li><li>4. Person or entity authentication. A covered entity must implement procedures to verify that a person or entity seeking access to ePHI is the one claimed. (§ 164.312 (d))</li><li>5. Transmission security. A covered entity must implement technical security measures to guard against unauthorized access to ePHI that is being transmitted over an electronic communications network.</li></ol>
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**Source:** Summary of the HIPAA security rule. Available at <http://www.hhs.gov/ocr/privacy/hipaa/understanding/srsummary.html>.

Mistakes here will have serious effects both on your reputation as a professional and on the practice. Whenever possible, you should work with patient records containing protected health information (PHI) while at the practice. If they are transmitted, PHI should be removed. In instances where this is not possible, such as producing performance reports or missed opportunities reports for practices, you will want to assure use of a secure and HIPAA-compliant method of transmitting this information. Your program and the practice are likely to have policies around this. You will want to be familiar with these and work with the practice director and site champion to make sure you comply with their rules. Protecting patient confidentiality and adhering carefully to HIPAA requirements is a central part of PF professionalism. For detailed information on how HIPAA applies to PF work see the following resources:

- For researchers and implementers:  
<http://www.healthit.gov/policy-researchers-implementers/hipaa-and-health-it>
- For business associates and other covered entities:  
<http://www.hhs.gov/ocr/privacy/hipaa/understanding/coveredentities/index.html>

Email is still sometimes used to transmit data on patients. Because the contents of a regular email are stored in multiple places (including the computer, mail server, recipients' computers, and mail servers), they are vulnerable to unauthorized access. You need some means of reducing this vulnerability, such as email encryption. Your program is likely to have policies and procedures in this area. Be sure you are familiar with these and that you address these issues with your PF supervisor, program director, and the practice.

In addition, you may want to consider obtaining other certifications that will enable you to provide a wider range or deeper level of support. For example, certification in human subjects would allow you to provide support to research studies occurring at a site. Certification in specialized quality improvement processes such as “Lean” or in processes such as appreciative inquiry ([see Module 11](#)) for an introduction to appreciative inquiry) can enable you to provide a deeper level of support in these areas and will increase your ability to serve as a resource to your program and team.

*Key points regarding HIPAA:*

- Ensure that your HIPAA certification is up to date.
- Follow HIPAA requirements around transmission of information.
- Consider other certifications that can increase your scope of support and ability to support your practices and your program.

## **Summary and Conclusions**

Practice facilitation is a relatively new profession that grows out of a long tradition of assisting organizations and groups from many different sectors to improve and transform. Professionalism is a key component of any profession and assures a certain level of conduct and quality of work. Adopting professional behaviors as PF will help you build effective change-oriented relationships with your practices, your PF program, and other PFs. In addition, being a professional can only serve to advance the emerging field of practice facilitation.

## References

*Merriam-Webster Dictionary*. Definition of professionalism. Available at <http://www.merriam-webster.com/dictionary/professionalism>

## **Appendix 7A. Case Study: Practicing Professionalism When Confronted by a Difficult Work Event**

### **The Situation**

Bestever Medical Group had a two-year contract with an outside consultant to work on setting up a registry for their Diabetes Care Initiative. The practice facilitator (PF) was instructed by Bestever's quality improvement (QI) team to work with its consultant to update registry reports to track patients in its new Diabetes Managed Care Program. The PF and the consultant were never formally introduced but asked to work with each other. The PF attempted to meet with the consultant. Initially the consultant did not return her call and email to request a meeting. He finally did but sounded irritated and started questioning her about why she needed to meet with him and who at the practice had asked her to work on this.

### **The Response**

Being fairly new to the QI team, the PF asked Bestever's lead clinician for a quick meeting and explained that it would be helpful if she could introduce the PF to the consultant and explain the PF's role and how she envisioned the PF and consultant working together. The PF shared that this would help the work with the consultant be more effective and efficient.

### **The Outcome**

The clinician introduced the PF to the consultant and explained roles and activities. The PF discussed this further with the consultant after the initial introduction. Over the next few weeks, the consultant became more open to working with the PF and collaborated more effectively with her on the registry work.

## Module 7: Professionalism for Practice Facilitators

### Appendix 7B. List of Learning Resources for Practice Facilitators

#### **Institute for Healthcare Improvement Open School**

*Courses offered at IHI are in the subjects of patient safety; improvement capability; quality, cost, and value; person- and family-centered care; triple aim for populations; and leadership.*

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

#### **ImpactBC**

*This not-for-profit organization in Vancouver provides health care partners coaching. They provide online learning resources that contain short modules and other resources to help guide and identify techniques used in quality improvement projects.*

<http://www.impactbc.ca/>

#### **AHRQ's Practice Facilitation Resources**

*AHRQ has a set of resources for practice facilitation programs, including practice facilitation training and curricula, and resources for practice facilitators. Link for AHRQ's Practice Facilitation Resources:*

<https://www.ahrq.gov/ncepcr/tools/transform-qi/deliver-facilitation.html>

#### **Coach Medical Home curriculum**

*Coach Medical Home materials are a collaboration of Group Health, The Commonwealth Fund, and Qualis Health. The site provides training materials for facilitators who are working with safety-net practices.*

<http://www.coachmedicalhome.org/about/coaching-overview>

#### **Safety Net Medical Home Initiative**

*The Safety Net Medical Home Initiative aims to be a replicable model for implementing medical homes in the safety net. As part of the project, the partners developed a robust set of training materials for facilitators and other professionals. These include materials on sequencing change, recognition and payment, and collaborations, among others.*

<http://www.safetynetmedicalhome.org/resources-tools>

## Annual Conferences to Consider Attending

- Academy Health: <https://www.academyhealth.org/>
- Society of Teachers of Family Medicine Conference on Practice Improvement: <http://www.stfm.org/Conferences>
- North American Primary Care Research Group (NAPCRG) Practice-Based Research Network (PBRN): <http://www.napcrg.org/Conferences>
- Institute for Healthcare Improvement, National Forum on Quality Improvement in Healthcare and International Forum on Quality and Safety: <http://www.ihl.org/education/conferences/Pages/default.aspx>

## Module 7: Professionalism for Practice Facilitators

### Appendix 7C. Management Tips for Dealing With Difficult People

*Harvard Business Review* offers the following management tips for dealing with difficult people. These are some key tactics to remember:

1. **Give feedback:** provide the person you are having difficulties with some insight to what you are experiencing from the opposite side. Let this person know what you observe and how the situation is made difficult. It can be helpful to use a format such as “when you (details), I feel (details), what I need differently is (details).” Avoid using “you” statements or other approaches that can be viewed as critical or attacking.
2. **Focus on work and not the person:** some interactions are short and may not require any confrontation. In these instances, the best solution would be to remove yourself from negative emotion and simply focus your attention to the work.
3. **Ask for commitment:** remind the person you are confronting that you are committed to the project and ask that he/she also commit. Essentially, you are both working toward the same goal and objectively need to find a means for better interactions. The commitment is not made to each other, but to the project.
4. **Keep your composure, or walk away:** in a heated moment, it will be difficult to confront someone with a solution to a disagreement. If you find yourself upset beyond recovery, the best approach would be to keep your composure, and excuse yourself from the situation. Do this only when you absolutely need to, when you find yourself unable to communicate effectively. If you do walk away, make it a point to arrange a time to continue the conversation when you are both feeling calmer.
5. **Identify common ground:** perspective from either side may not be understood, but the PF should work with the difficult personality to identify common ground. Still, a PF may not necessarily use this tactic to work on difficult personalities as the inherent structure of the relationship between the PF and the practice abides by the needs and views decided on by the practice itself.
6. **Hear the other person:** sometimes all that needs to happen is for the other person to be heard, so listen.
7. **Propose a solution:** if you find a difficult personality within a team, the PF could propose a solution for dealing with this individual. Depending on the issue, this could include changing his/her role and responsibilities, have a one-to-one meeting discussing a potential solution, etc.

8. **Turn your competitors into allies:** In the example of the consultant, it is important to remove competitive emotion, and work with them to show how you can both gain from each other's expertise.
9. **Reflect:** Take a moment to consider the event and person from whom you had a confrontation or indication of difficult personality. Ask yourself how you can improve the relationship? Is there something you can address or easily approach with this individual? Are there patterns in his/her way of being?
10. **Get feedback:** the best place the PF can obtain feedback is at the PF program office or base. The PF should ask the advice of superiors and colleagues after detailing background and current circumstances.