

## Using Normalization Process Theory to Identify PF factors that Promote or Inhibit QI

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MARK WATT

Thanks Alex and just gonna start with a bit of a volume check in the back. So you guys can hear me even if I don't stand in front of the mic? So we did have this really fancy title that used a lot of jargon words. But really what we wanted to come in and talk to you about is advancing some of the science around practice facilitation. And that before we get started, quick show of hands how many people here they are practice facilitators directly working with practices? Most of us. And then the remainder, raise your hand, if you're a person who supports practice facilitators. That's kind of who we were expecting to see. And so I'm part of the Canadian contingent. And so if you can't bring anything with me, I'm sure you'll figure that out right now that, yeah,. Some of the Northern partners around practice facilitation. We work with health innovation with [inaudible] I'm joined today by Shaelynn Garner. You know, in preparing for the session I wanted to acknowledge the contributions from the University of Glasgow. So we will get into the workshop, I promise, but I thought it's always, you know, interesting to say, you know, where, what was the reason for us [inaudible]. When I first started as a practice facilitator [inaudible] And if a practice didn't achieve those quality improvements, it had to have been something else, it couldn't have been us. And, and so there was, you know, that initial kind of somewhat joking around of [inaudible] opportunity to start to [inaudible]. I mean, what is it that, that practice facilitators [inaudible]. There are some of those factors that we can attribute are more likely to [inaudible]. So started started trying to research this position three years ago and was starting to think about conducting a systematic review and being academic about it. And months later, we had a very wonderful publication from Dr. Sweeney, who really did an amazing job. Some of the things that make an effective practice facilitator, if you haven't registered, I'm going to encourage you to because essentially it broke my heart and said, I really don't need research. But in summary, what she found is that practice facilitators have this ability to really tailor their interventions to each practice. So it's, it's about taking that intervention and then customizing it. And for us? Probably not groundbreaking, but it was a finding that was very important. Second part is that more effective practice facilitators really find a way to connect the motivation of the project, to what is important to the practice. So understanding their value, trying to achieve the practice and less about trying to engage in an project that the project was a means to their ends. I thought that was a really important finding to say, to helping frame things in certain ways. They also found that when resistance or challenges came up, that was addressed directly that that will be a key function of practicing facilitation and of the practice work. Again, the more effective practice facilitators have opportunities to cross-pollinate, work with all these practices,

what they had to use. And it was a purposeful opportunity to bring new ideas and strategies in. And then lastly, again, very focused on being able to achieve [inaudible] really lead to success for the practice. So my heart was broken at this point to say, well, maybe I should go and look at something else. But I was working on my master's thesis. So I had, you know, my timelines were now ticking. I said, well, it worked in that sense, but maybe you can look more systematically across other projects and you have the same kind of [inaudible]. So we're all familiar with a systematic review. We started to define some terms and found a lot of publications, 5000 publications, really focused on primary care, practice facilitation, and on achieving quality improvement outcomes. From that [inaudible] and 23 of them were high quality. About what it is that practice facilitators do and [inaudible] practice teams. We extracted all of those things [inaudible] [inaudible] We brought all that information together and started to thematically analyze it. Before I get to my point back for the workshops, we need a framework to help organize it. What would it actually take [inaudible]

SPEAKER

MARK WATT

[inaudible] So just by show of hands, how many people have heard of this term before today? So about what I was expecting. This is a relatively new theory that's being developed, originated to help explain how large scale technological change, all that's involved in there. [inaudible] I was interested in thinking about a step further and [inaudible] [inaudible] [inaudible] [inaudible] [inaudible] [inaudible] We going to the contract, we need to come back to the contract. But when I was here to say, well, we know that she is social not one person does that. So if you look at what was the practice facilitator was project is successful over 100 years position, chair administrator EMR subject matter expert who were contributing their success. And so we can start to OK, I, not by default, anything that we don't see showing up as a practice facilitator, something that is either a being done by practice team or B a yeah, all our practice. So the normalization process theory in nine first one is you know, talk about her work. Yes. In order to make sense, so you're starting to talk about vol e project, you're probably saying that person are trying to help them understand what is the difference between what they're doing right now. And not a lot of work over to this part. He has to you have to understand it, value a value statement, you just attractive. Is it worth it in the end? I'm just gonna, that's the kind of we're talking about. Secondly, this is the kind of the next participation. And so participation is about how you come together and I facilitator mhm Improving team comes together and start work on whether their contributions to project helping people see that they have a role to be buying the acid sugar and that's work done by.

SPEAKER 5

So after members of that schedule getting ever actions.

MARK WATT

And in, yeah, that really represents the part of the change, which is next one is collective action. And I think when you talk about collective action, this really is the operational I of A so I'll introduce you. How are we going to do this? How is this going to work and make you process to understand? Well, if I'm going to do this now that obviously it could be wrong negotiation. OK. So you're asking me to be more correct about my faith, managing the inter person. You know, when it, when it doesn't go as expected. Wonderful. And then the last contract, a reflective monitor kind of think the nation. But it's also about how, oh yeah. and they, how do you put certain parameters in our system, that color? So that's again another for the and and so, he provided to me just as a, to give you an idea is how they organize the areas need to engage with that of the project. And now I think we start to shift shift in some of our work together which will mirror much of see results.

SHAELYNN GARNER

Yes, absolutely. OK. So, require a little bit of moving and organizing on

SPEAKER 5

our part.

SHAELYNN GARNER

But at the end of each of your rows, hopefully there should be a pile of sticky notes. So if you have one by you, could you pull off a pull off a stack, probably like 10 or 12 for yourself and make sure the rest of the people in your row have some sticky notes too. And if you can't locate a sticky note pad, let me know. And I will bring you a pad. You also need something to write with. So there's some markers on the end of chairs if you need and I can hand out more as well. I'll give you just a moment to make sure everyone has some sticky notes and then, and I'll go over the rest of the instructions.

SPEAKER

SHAELYNN GARNER

Ok. So to start off, this is going to be an individual task for about a few minutes. Five minutes. So, I want you to think about and identify, let's say 10 to 20. If it's three, that's great. If it's 20 that's great. But let's aim for about 10, 10 to 20 tasks or activities that you as a PF did to support a project. So you're thinking about doing activities [inaudible]. So your job is just to write them down. Whatever comes to your head, pull off the sticky note and keep going. If you need more sticky notes, they're around. But if you run out that's ok too. So just think about those top things that PFs do. And when we get to that point, I will transition to the next task and walk you through it and then we're gonna go into the group part of this. So, let's get started with that. Ok. So the next task is you need to find a group of five or six. You might have to pull chairs sideways. You might need to get up and move, but you want a group of five or six and you're going to talk about all the different things you wrote down on your individual sticky notes and start themeing them. So you're gonna make little piles of different sticky notes. Let's say these two notes from different individuals. One

said "oh, I introduced change to a physician" and someone said, "oh, I introduced change to a clinic manager." Then say, "OK, that means introducing." You just stick them on top of each other, for an example. So if there's general concepts that are the same kind of idea, you would just start forming a big pile or stack. So you'll eventually probably have about five or six different stacks going with those themes within them. So I'll give you a moment to get into that group of five or six and then you can start doing that them with your sticky notes. All right. Go ahead. Right. Ok.

SPEAKER

SHAELYNN GARNER

Just a few more minutes about three more minutes for this step.

SPEAKER

SHAELYNN GARNER

Your one minute warning.

SPEAKER

SHAELYNN GARNER

Can I get your attention up here?

SPEAKER

ALEX MOORE

Thank you.

SHAELYNN GARNER

Thank you. Someone volunteered a whistle for me. So it is much appreciated. If you were in conversation still, you can go back and finish that conversation when we go into this next phase here. Ok. So the next step is going to be taking those themes, those different piles of PF things that PFS do and actually start mapping them to the NPT constructs. So this will be your guide to remember the different characteristics and things that fall under each of the elements. And if you're more comfortable to have that initial conversation sitting in your groups, that's great. You can kind of start mapping that out. But then I encourage you to go find a piece of chart paper over here. I've labeled them, Don't mind my, my awful writing. But I've labeled the different constructs on there and then you can fit your themes and your piles where you think they belong based off the criteria on here. And if you have some individual notes still, that's OK. It might be a theme the itself. So just do your best. Let's,

just to make this organized, you see the back group, definitely use this piece of chart paper. The group that was here, use this one. There's two more over here. So the middle groups perhaps go towards Mark that way and then this front group, there's one here on the door over there. OK. Is there any questions on this, that next piece? You might have to rely on this quite closely and you have 10, 15 minutes for this piece. So you can have those conversations about where you think they fit again. OK. Go ahead. Thank you.

SPEAKER

SHAELYNN GARNER

Halfway mark for this point!

SPEAKER

SHAELYNN GARNER

Just a couple more minutes here.

SPEAKER

SHAELYNN GARNER

Ok, while you're finishing up your final couple sticky notes, what I want you to do is to pick a group member that wouldn't mind being a representative to share some of the different things you have under each of the components. OK? So the next step is reporting back to the larger group. So how we're gonna do this to save time? We don't go through every single piece on each of the things you've listed is we're going to start with one theme. We'll start with coherence. One group will share the different themes that they had under coherence and then we'll go around and do each group. But as you go, if there's something you've already heard that, you know, is in your own grouping, you don't have to say that one. If it's been covered, just share what's new under your theme. So by the end, if everything's been shared, that's OK. that's great. Does that makes sense? OK. Excellent. So this group, we're gonna start with you and we're gonna start with coherence and then we're gonna make our way around. Mark is going to write those themes up on his copy for the larger discussion that we're, we're going to have. So what kind of things did you have under coherence?

GROUP REPRESENTATIVE

For coherence we had training, education course for Lean 6Sigma, patience, and provide evidence based guidelines.

SHAELYNN GARNER

Okay so: training, education, Lean 6Sigma, and evidence based guidelines. OK. Thank you. OK. This group for coherence, is there anything else that you have in your list? You can send

a group representative up to your chart so they can take a look at what's there. So you're not trying to remember.

MARK WATT

We can bring it to you.

GROUP REPRESENTATIVE

I can stand here. We develop guidance, which we've kind of covered already, explaining plans, researching info and tools. Yeah.

SHAELYNN GARNER

Thank you. OK. We'll go to this group over here.

GROUP REPRESENTATIVE

[inaudible]

SHAELYNN GARNER

Is that OK Mark? You got that? Perfect. Thank you so much. OK. Next group!

GROUP REPRESENTATIVE

[inaudible] All of ours have been done.

SHAELYNN GARNER

OK, perfect. OK. So we'll do the round again. Actually let's start over there with cognitive participation. Oh, sorry, I mixed it up.

GROUP REPRESENTATIVE

Our big one was support and motivation. [inaudible] Collaboration. Planning, [inaudible], and resources.

SHAELYNN GARNER

Awesome. Thank you. Okay, next group.

GROUP REPRESENTATIVE

Okay, yeah. [inaudible] We had information gathering, [inaudible]. [inaudible] [inaudible]

SHAELYNN GARNER

And this group right here.

GROUP REPRESENTATIVE

Honestly, it's like stakeholder engagement.

SHAELYNN GARNER

Yeah. Engaging internal stakeholders. OK. And we're gonna start up here this time. Collective action.

GROUP REPRESENTATIVE

We said escalating solutions to leadership teams, publishing barriers to success, and [inaudible].

SHAELYNN GARNER

Okay, this group of collective action, we have quite a few.

GROUP REPRESENTATIVE

Most of project management is building things. [inaudible]. There's relationship building. There's things like policy review, [inaudible].

SHAELYNN GARNER

Thank you. And that corner.

GROUP REPRESENTATIVE

And we also had dry runs for the practice.

SHAELYNN GARNER

Alright, thanks. Yes, collective action.

GROUP REPRESENTATIVE

We ended up having teamwork, relationship building, problem solving, sharing tools, and [inaudible].

SHAELYNN GARNER

Great. I'm not going to talk so Mark can remember those.

MARK WATT

I'm capturing the spirit.

SHAELYNN GARNER

OK. And we will start...is it Heather? Ok. Excellent. And we'll start with you for reflexive monitoring and then we'll go clockwise.

GROUP REPRESENTATIVE

Most of ours, the categories have been surveys or our admin stuff that we do. [inaudible] [inaudible]

SPEAKER

SHAELYNN GARNER

Ok. Back corner.

GROUP REPRESENTATIVE

[inaudible]

SHAELYNN GARNER

Thank you guys.

SPEAKER

SHAELYNN GARNER

This group. Anything that wasn't included?

GROUP REPRESENTATIVE

[inaudible] [inaudible] and celebrating milestones.

SHAELYNN GARNER

OK. I'm going to switch slides here and to our bigger conversation. OK, so as a group and I, we're gonna call on Mark here a bit to just highlight the different things that are under each section. But as a group, we review the PF activities and behaviors assigned to each categories and we'll collectively analyze if there's any pieces missing under each of the constructs. So it's marked as a quick highlight. Again, the spirit or theme is what matters. There might be some, some detailed things that we haven't captured. But then we're gonna consider what actions or behaviors did we not mention or only lightly mentioned under each construct? And we can share those out loud, what we think might be missing. And then we're going to consider how those gaps might

SPEAKER 5

be felt.

MARK WATT

I'm actually gonna start with a question that's not on here. And I guess the first question I have, is there any [inaudible] [inaudible]

AUDIENCE MEMBER

Storytelling [inaudible] [Inaudible] [Inaudible]

MARK WATT

Great observation. That's something that we found as well. What is the purpose of the storytelling? But what happened?

SPEAKER



MARK WATT

We know that some things fit in more than one box. so that the one that's good is validating from what we saw in the everything is one, but one thing we've been doing, the section is we, we did everything as if at all. I want to the period, providing education, credit providing and you man exchange, please have the, you know, the

ALEX MOORE

necessary information, right?

MARK WATT

So I think that the subject matter, I bring your advice, what needs to be done or how it needs to be accomplished. I could fit in any of the boxes So thank you for raising that. I think it's a problem dominated. So similarly under co participation, can you treat all of these things in every project in every practice? And maybe I can do a little bit more of this kind of nationalist of all things. So we gonna take a pause here to say that the majority of people, one of the observations that I had is I know, yes, vol e of activity that I'm only in that second. And and then this is for start to think, OK, well, if I'm moving this, I bye budget. So it's just a way of trying to, to be very practical about what as a price. So I'm gonna move to some of our findings that are very, be very busy. Mhm. When we looked at all of these activities and then we went back exactly a success. If you that was not successful in or some of the positive and some of the negative you boil down to first off this practice facility, practice facility leaders. We need to be focused for something that has happened. You need that second team, they help the of not talking about this, what you're trying to accomplish in the project. Went to the where do you wanna be? How do you wanna be insurance contract would be to step in to that cognitive participation is the most impactful for that. How fast the expecting practice is to change or for the Change Act. So music in the female, I see what that resistance is, work with that practice team to address it cousins, you know, I in five. But actually it was the structure of the saw that when you're using the the improvement model that we have progress notes and they were providing more structure to how the team and practices that were successful. Six. Again, this is why I think we of being practical sources for developing are trying to take abstract idea and our security have a phone n ber for customization. And lastly, when you talk about my, I thought that was such an important thing, practice facilitators of the scheme with the n ber. I, I would see this bottom part here. I'm not trying to be looking at how does that practice sharing information also a pen paper and better, but we were connected connect that seem to have a greater impact when c role model, how do you do this, you that have higher? And I just s marize what I just said and what we, what we found that didn't work, what was clear in the evidence says these are things that we should avoid doing the past, adapt to what the practice needs and wants. And she just really taking online and, and sharing actual. So I can ask a question around, you know, what are some of the applications that we see? Here, you see that that's the value. So if you am, I really focused on so positive, I think that is giving me the sign o the

SPEAKER 5

I do all this order to ensure that you have

ALEX MOORE

activities that I guess the part that I get a little bit, I'm not buying it and like the, the struggle of local distance it is, but it doesn't like at a high level like that and making sure that you're really covering all.

SPEAKER 5

I think that stuff.

MARK WATT

So yes, we did. There is actually more, I get that number so that I'm not just OK. Yeah. So often one of the request. How do we know that the still here for doing the right things to achieve? I see and be attributed. This is so from a resource, Alex happy to ask your questions later at the great, I appreciate all of your hard work into your collaboration.