

From Novice to Expert: A Qualitative Study of Implementation Facilitation Skills

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Background

- Implementation Facilitation (IF) is not for sissies!
 - IF is a complex strategy that incorporates multiple other implementation strategies
 - Facilitators need to be able to tailor what other strategies they select and what they do to:
 - organizational context
 - characteristics of the particular innovation
 - individuals and teams/groups who will implement and/or receive the innovation
 - Facilitators also need to be able to tailor how they do it (along the continuum of doing versus enabling)

Background

- Scholars agree facilitators need a wide range of skills^{1,2}
- What we know about IF skills:
 - Mostly described in conceptual and theoretical literature, project descriptions and reviews of this literature
 - Few studies of skills; mostly retrospective
 - Communication, interpersonal, and group/team management skills mentioned most frequently
 - Lack of definitional clarity and operationalization
 - Lack of requisite skills impact outcomes^{3,4}

Background

As a precursor to understanding how to transfer IF skills to others, this study sought to identify and describe the wide range of skills an expert facilitator transferred to initially novice facilitators

METHODS



Context: Blended Facilitation Project

- Blended Facilitation Project^{5,6}
 - Enhancement of a national VA policy initiative mandating primary care-mental health integration (PC-MHI)
 - One national expert facilitator (EF) and an internal regional facilitator (IRF) in each of two VA networks helped four clinics in each network implement PC-MHI
 - The expert EF transferred implementation facilitation skills to the initially novice IRFs over a two year period
 - Before the end of the project, IRFs were recognized nationally in VA as implementation facilitation experts

Source Data: Blended Facilitation Project

- Data analyzed for this study:
 - Pre-site visit call notes
 - Individual monthly debriefing interviews with facilitators:
EF interviews focused on activities to help IRFs learn implementation facilitation skills (notes, near verbatim)
 - Individual semi-structured qualitative interviews with EF and both IRFs at two time points (transcripts)

Analysis

- Directed content analysis of source data to identify skills
 - Initial code list developed based on relevant literature and practice facilitation training materials
 - New codes added as they emerged from data and codes refined during analysis
- Explored complexity/overlap of skills
- Clustered skills into higher-level skillsets
- Developed rich descriptions of skills

RESULTS



Key findings

- 22 implementation facilitation skills
- *Communication skills plus 5 groups or skillsets
 - Building relationships and creating a supportive environment
 - Changing the system of care and the structures and processes that support it
 - Transferring knowledge and skills
 - Planning and leading change efforts
 - Assessing people, processes, and outcomes
- IF skills are very complex and mostly overlapping

Skillsets

1) Building relationships and creating a supportive environment

- Interpersonal skills
- Stakeholder engagement skills
- Motivating and building confidence
- Political skills
- Interacting and working with leaders

Skillsets

- 2) Changing the system of care and the structures and processes that support it
- Helping to design and adapt a program to meet local needs
 - Problem identification and solving skills
 - Presenting and using data to improve the program
 - Integrating the program into other programs and services

Skillsets

3) Transferring knowledge and skills

- Education and marketing skills
- Training, mentoring, and coaching skills
- Learning and fostering learning skills
- Building learning collaboratives/communities of practice

Skillsets

4) Planning and leading change efforts

- Administrative and project management skills
- Meeting facilities and individuals where they are
- Leading and managing team processes
- Thinking strategically and planning
- Pulling back and disengaging from facilities and individuals

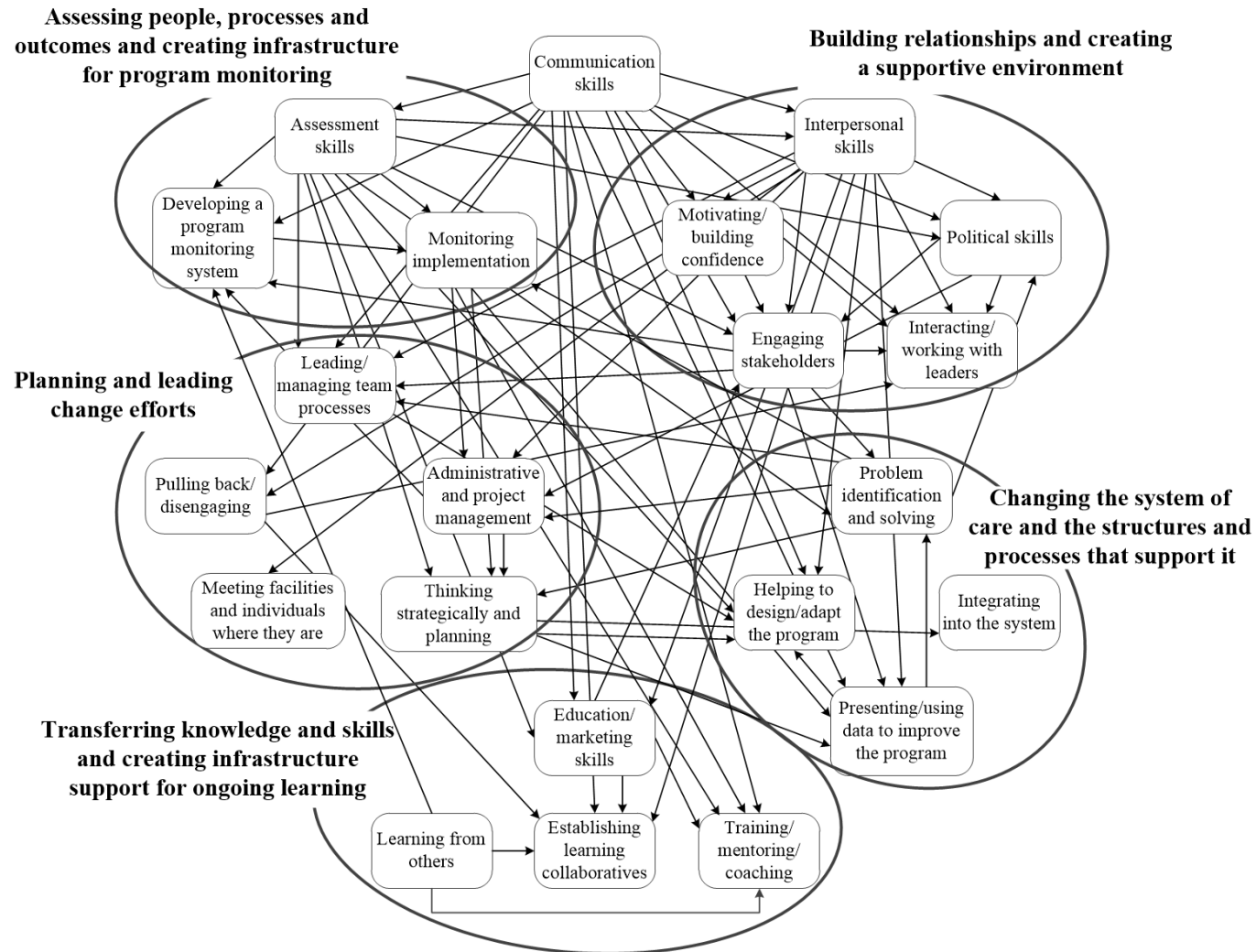
Skillsets

5) Assessing people, processes and outcomes

- Organizational and individuals assessment skills
- Developing program monitoring systems
- Monitoring program implementation and status

IF skills – not only complex but overlapping

- Implementation facilitation skills are very complex
- With a few exceptions, these skills overlap with one another
- Communication, interpersonal and assessment skills are components of multiple other skills



Conclusions



Conclusions

- Experts have a large number of complex implementation facilitation skills
- Not all implementation efforts require the full range of IF skills
- To insure fidelity to the innovation, facilitators need to have the appropriate skills⁴
- Didactics alone may not be sufficient for transferring such complex skills

Conclusions

- Lessons for transferring/learning IF skills
 - Don't just focus on the technical skills needed
 - Do focus on development of communication skills and those needed to build relationships and create a supportive environment
 - Don't assume that new facilitator's existing skills (e.g., good communication skills) easily transfer to IF
 - Do identify all of the skills needed for the particular implementation effort and focus on those

QUESTIONS



References

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