

# Primary Care Practice Facilitation Curriculum

Module 19: Conducting a Kickoff Meeting



Agency for Healthcare Research and Quality

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# Primary Care Practice Facilitation Curriculum

## Module 19. Conducting a Kickoff Meeting

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# Contents

Instructor's Guide .....	1
Time .....	1
Objectives .....	1
Exercises and Activities To Complete Before and After the Session.....	1
Module 19. ....	2
Meeting Logistics.....	3
Meeting Agenda .....	3

# Module 19. Conducting a Kickoff Meeting

## Instructor's Guide

Practice facilitator (PF) competencies addressed in this module:

- Basic skills in professional behavior with people, project, and meeting management

### Time

- Pre-session preparation for learners: 10 minutes
- Session: 60 minutes

### Objectives

After completing this module, learners will be able to:

1. Understand the purpose of a kickoff meeting.
2. Facilitate an effective kickoff meeting.

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

**Pre-session preparation.** Ask the learners to review information in item 1. (10 minutes)

1. The content of this module.

**During the session.** Presentation (15 minutes)

1. Present key concepts from the module.

**Discussion.** Ask questions and explore answers with learners. (15 minutes)

1. What is the purpose of a kickoff meeting?
2. What is the role of the facilitator?

**Activity for learners** (30 minutes)

1. Divide into groups of three and conduct a “mock kickoff” session.
2. Designate one person the practice facilitator, one the practice staff, and one the observer.
3. Have each triad report to the entire group about “lessons learned” from the mock kickoff session.

## Module 19.

A kickoff meeting is an important part of initiating an improvement project at a practice. It symbolizes a formal start to the project, creates a deadline for the practice to pull together an initial quality improvement (QI) team (see [Module 20](#)), and gives you an additional opportunity to educate staff and clinicians about your role as a practice facilitator (PF).

This module is designed to assist PFs in conducting a kickoff meeting. More information on running effective meetings in general and building practice capacity in this area is available in [Module 22](#).

A kickoff meeting for a practice facilitation should involve the practice leadership, your “practice champion,” and the QI team for the practice. It is important to note that this is not an “all-practice” meeting. It is only for those that will be helping to lead the improvement work. This is not to say that other staff and clinical members won’t be added to this leadership group as the project evolves and you and the core team identify other key personnel who should be involved. But for now, the focus should be on the initial group of staff that will be leading the effort.

The goal of the practice facilitation kickoff meeting is to introduce the QI team and practice leadership to the resource of “practice facilitation,” identify the core practice team that you will be working with, confirm their participation in the improvement effort, and identify their initial priorities and goals for the work you will do together. When the facilitated improvement work is part of an externally funded project, this is a time to introduce the requirements of the externally funded project and to discuss the commitments and priorities of the practice and the funders. More information on working with leaders and practices to set priorities and goals is also provided in [Module 21](#).

This kickoff meeting also provides an opportunity to conduct an initial training with the QI team on the content of the improvement project if the focus of the work is already defined, for example improving asthma care. When appropriate, you can incorporate informal academic detailing into the first session to help build enthusiasm among clinicians and jumpstart the project. You can do this by including a physician in the meeting who has already completed the improvement work in his or her own practice and who can share experiences with the others. This individual can serve as a co-presenter with you at the meeting as well as a member of the facilitation team for the practice. [Module 16](#) provides more information on working with academic detailers and resources for identifying detailers in your area.

Also at this meeting, you will want to collect administrative paperwork from the practice. For example, your program may require informal or formal agreements with the practice, as well as other administrative documentation such as data use agreements or business associate agreements.

## Meeting Logistics

You will be responsible for scheduling the kickoff meeting, which should occur at the practice or a nearby location and last about 60 minutes. Whenever possible, the meeting should be conducted in person. If you are facilitating from a remote location, you may want to conduct some initial pre-work by phone and then schedule an in-person kickoff meeting.

One of the challenges of coordinating the kickoff meeting is scheduling a day and time to meet. Consider the schedules of all potential attendees, including other facilitators, the academic detailer, practice leadership, and the QI team members. A number of online scheduling resources can help you gather information on all participants' availability and set up the meeting.

## Meeting Agenda

Don't try to cover too much information at the kickoff meeting. If your facilitation is focused on a particular improvement project, such as implementing the Care Model or the Patient-Centered Medical Home, you can give a brief overview of the project (see [Module 24](#)). If you are bringing an academic detailer, provide enough time for the detailer to share experiences with facilitation and its impact on his or her practice and patients.

You should give an overview of the goals of the facilitation intervention and your role and function as facilitator. Make sure that the practice members have the opportunity to ask questions and encourage them to identify some preliminary goals for the upcoming intervention. You may need to reserve time to attend to some paperwork, such as executing a memorandum of understanding (MOU) or a business associate agreement (BAA), for sharing protected health information. This can be completed at the end of the meeting. A sample agenda of the kickoff meeting is provided in Table 19.1.

**Table 19.1. Sample agenda for kickoff meeting**

12:00-12:10	Welcome and Introductions Goals of meeting
12:10-12:30	Review of key elements of the facilitation intervention Academic detailer presents experiences with facilitation or with implementing the target changes in his/her practice and presents the case for change (goal is to build support for prioritizing improvement activities)
12:30-12:40	Confirmation of practice's intent to participate and initial goal setting for intervention
12:40-12:50	Review of roles and expectations for practice facilitator and practice during intervention
12:50-1:00	Review and completion of administrative paperwork (business associate agreement, memorandum of understanding, and other documents as relevant, such as a Federalwide Assurance for the protection of human subjects if research is being conducted as part of the facilitation) intervention)

Note: this module is based on Module 13 of the Practice Facilitation Handbook. Available at <https://www.ahrq.gov/ncepctr/tools/pf-handbook/index.html>