**ENGAGEMENT SCENARIO**

**THE SET UP:**

A Practice Facilitator (PF) has been assigned the task of engaging practices to participate in PTI. The CEO of the organization has requested that the PF start her PTI outreach with Clinic ABC, but there has been little communication from the organization’s C-Suite regarding what is expected of providers and staff or the importance of PTI.

She has done some homework and has learned the following about Clinic ABC:

**Clinic ABC Staff:**

* 1 physician
  + Physician has been at the clinic for 6 years; she attempts to block time on her schedule for administrative tasks/duties, however, she generally ends up using the blocked time to see patients, as appointment access is poor.
* 1 nurse practitioner
  + The NP joined the practice 3 months ago, filling a relatively new position. Her patient experience feedback is stellar and she is proficient regarding technology and use of the electronic health records.
* 1 Medical Assistants (MA)
  + MA was just hired last month and comes from a clinic where team-based care was effectively functioning. She is accustomed to working at the top of her license and being accountable for population health management for a panel of assigned patients. However, Clinic ABC is struggling with team-based care execution and the MA is already feeling a bit frustrated that her skills are underutilized. This position has been somewhat of a revolving door, as the pay is low and the clinic location is difficult to get to.
* 1 Receptionist
  + The receptionist is a high-school graduate with no secondary education credentials. However, she has mastered the EHR (can generate reports, understands referrals, and can assist providers/staff with technical issues) is skilled at Excel and Word (self-taught). She has great interpersonal skills and patients react positively to her reminder and outreach calls. She is attending a local trade school to become an MA and would like to continue her education to obtain her nursing degree.
* 1 Office Manager
  + The Office Manager is shared by Clinic ABC and Clinic XYZ. She has been with the organization for 8 years and is responsible for quality and compliance, as well as general clinic operations. She has had training in the Model for Improvement and has tried to implement some changes, however, at this point she has only engaged the receptionist, NP, and the former MA in attempting to address patient satisfaction and care experience.

**THE ASSIGNMENT:**

1. Review your responses to the questions from our previous activity:
   * Who is “leadership” to you? Which leaders do you view as *crucial* to support the work you do?
   * What is your greatest leadership engagement challenge?
   * What does engagement look/feel like to you? What are the vital behaviors associated with being “engaged.”
2. Given your responses to the above questions and the facts of this scenario, how might you apply 4 of the Six Sources of Influence for the following:
   * To better engage the CEO (think about the vital behaviors you identified)?
   * To better engage the Physician Lead?