# Updated Virtual Facilitation Guidance: Innovation, Challenges and Opportunities

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- **Today's Objectives**
  - Review previously developed Virtual Facilitation expert consensus statement

  - Discuss the unique opportunities, challenges, lessons learned, and best practices to implement when using a virtual platform

  - Discuss similarities and differences between current travel bans related to pandemic and prior experiences

  - Provide updates from those with recent virtual facilitation experiences, including new challenges and solutions to inform current implementation facilitation practice during the COVID-19 pandemic

# New Clinical Innovations are Challenging to Implement

- **Top down initiatives are not sufficient**
- **Readiness to participate differs across facilities**
- **Requires the participation of multiple stakeholder groups**
- **Limited availability of providers to participate in implementation activities**
- **Education alone is rarely sufficient**

# Implementation Facilitation

A multifaceted strategy involving interactive problem-solving and support that occurs in a context of a recognized need for improvement and supportive interpersonal relationships.

*Powell, et al., Implement Sci, 2015*

# Facilitation

- **Bundles an integrated set of interventions**
  - Which intervention is applied varies based on the needs of the implementation process
  - Builds upon program/practice educational efforts
- **Dynamic in nature that involves interactive problem solving**

# Evidence for Implementation Facilitation

- Research supports IF as an effective strategy for implementing evidence-based practices (EBPs)

- **Systematic reviews** have found that primary care practices **were almost three times more likely to adopt** evidence-based **guidelines through the use of facilitation**

- Multiple studies both inside and outside VA show IF to be an effective strategy for implementing new clinical programs/practices.

- **Behavioral Health QUERI Implementation Facilitation Training Hub**
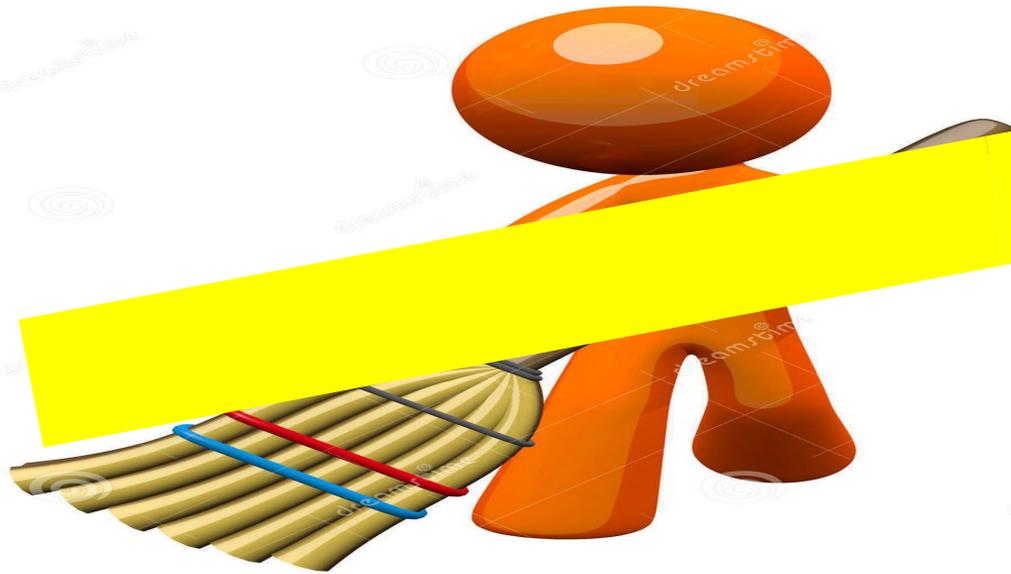  - Trains implementation practitioners and investigators

    - A 2-day in-person (or virtual) workshop (approximately 16 hours of training)
    - Improves knowledge of and confidence in using IF to implement EBPs
    - Includes preparatory work, didactic sessions, instruction on key IF roles/activities, interactive role-plays and group exercises.
    - Post-training mentoring and consultation

**For more information on the IF training program, requirements of trainees and to sign up for this learning hub, please contact: Krissi Morris** (Email: Krissi.Morris@va.gov)

*Behavioral Health* QUERI
*VA Quality Enhancement Research Initiative*

# All very nice, but what if?.......

**Unidentified VA executive**
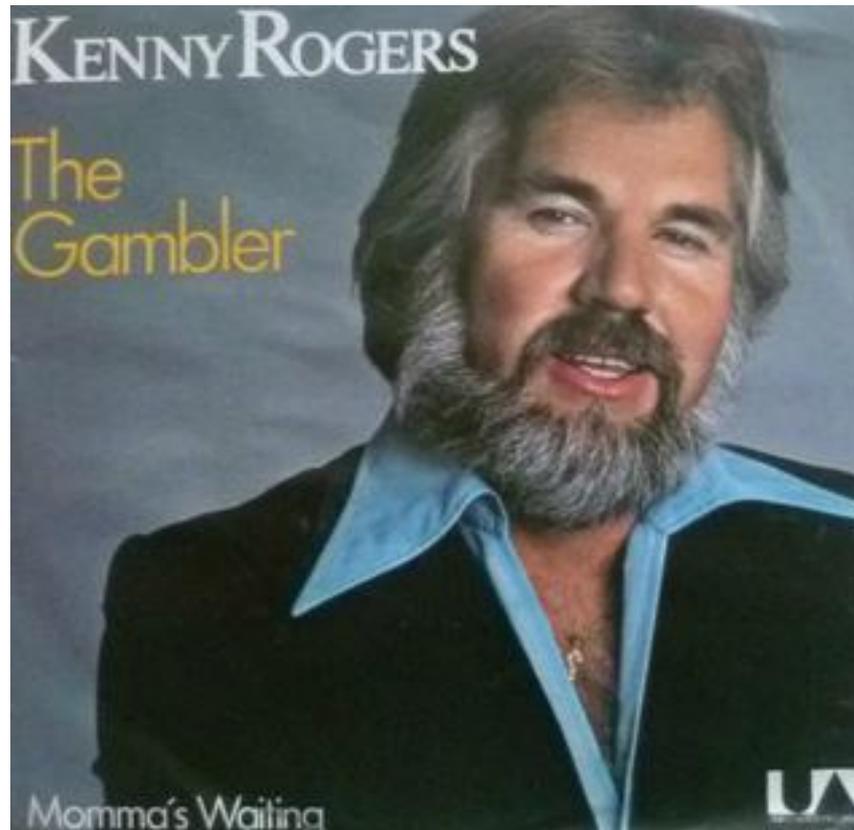
# Practicing Facilitation: What Would You Do?

As part of your project, you have been funded to provide facilitation to 8 sites, during a specific FY.  In June there is, 1) a VA wide travel ban, and 2) you are told that your travel funding has been swept and that you will not be permitted to travel to facilitation sites at all.  You have 2 sites, that have visits scheduled in July and 2 sites that you are in the process of scheduling.

- **What would you do?**

# Here's What We Did…

- **Adapt**
- **Discuss with experts**
- **Identify what has been done**
- **Learning collaborative and WG**
- **Identify what is known**
  - Practical experience & literature
- **Develop expert recommendations**

- **In Honor of Kenny Rogers:**

**You've got to know when to hold 'em
Know when to fold 'em
Know when to walk away
And know when to run**



**You never count your money
When you're sittin' at the table
There'll be time enough for countin'
When the dealings done**

- **Best practices from knowing when to "Hold em"**
- **E-mail communication to participating sites:**

  - "I purposefully delayed additional outreach to you. Our team does not want to be irresponsible in blindly moving forward while your facilities are dealing with COVID-19. Our current plan is to hold on the project until the situation is more stable…………"

- **But consider if you shouldn't "hold em" and give them the choice**

- **The E-mail continues:**

  - "However, given the recommendations for social distancing and isolation to reduce spread of the virus, now may be an even more critical time for connecting with the Veterans we serve and moving this project forward.  We wanted to give you the option based on the needs and challenges you are facing. If your facilities would like to move forward with implementation at this time, we have the ability to support implementation with minimal burden."

- **Email responses were tremendous:**

  - .."greatly appreciate your thoughtful approach and we'll support facility decisions on best timing to move project forward!"
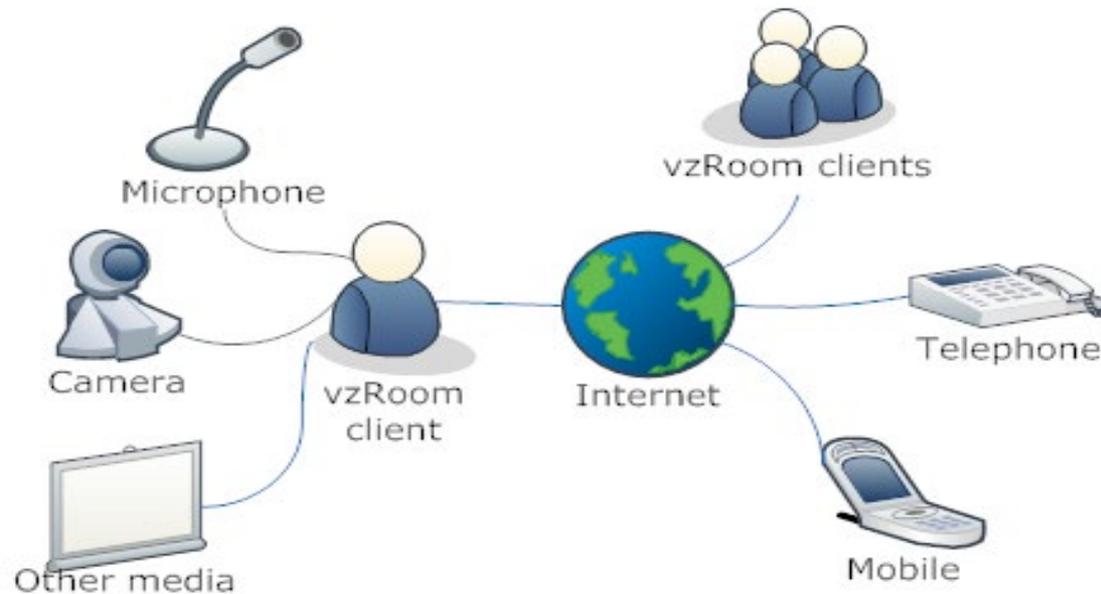
- **To a similar approach:**
  - "The sensitivity that you all have demonstrated has touched my heart greatly.  You are a model of leadership done right."

    "I've made a life out or reading people's faces and knowing what their cards were by the way they held their eyes"

- **If you decide to continue on during a travel ban or social distancing recommendations..**

# Virtual Facilitation

*Implementation facilitation conducted with limited or no in-person contact between the facilitator and the site implementing the innovation*

# Virtual Implementation Facilitation

- **Variety of technological platforms**
- **basic (phone) calls**
- **video teleconferencing,**
- **advanced technologies = combined audio, video and viewing/creation of shared documents**

# Advantages and Disadvantages

| Advantages | | Disadvantages |
|---|---|---|
| More flexible scheduling for team members. | ADMINISTRATION | Difficulty scheduling when crossing multiple time zones. |
| Improves likelihood of attendance, expands pool of likely participants. | INTERPERSONAL CONNECTIONS | Networking and interpersonal contact may be stifled. |
| Allows off-line work to continue. | ENGAGEMENT | Participants can become inattentive or absent without FTF proximity. |
| Reduced cost and low-carbon footprint for meetings. | COST-EFFECTIVENESS | Requires technological capital. |
| Facilitates tracking and archiving of work-activities. | DOCUMENTATION | Risk of over-monitoring or a culture of surveillance. |

Table: Advantages and Disadvantages of Working in Virtual Teams (from NCOD's) workbook for virtual teams.

# Virtual Facilitation: Ideas for Optimizing

- **Important to "see" site partners in interactions for implementation planning / monitoring**
  - Contributes to developing relationships and rapport
  - Non-verbal cues missing from telephone-only contact
- **Consider various platforms for interactive meetings**
  - **V-Tel, Skype, Adobe Connect via EES, GoToMeeting, other (your suggestions)**
  - Vary platform (and agenda) based on needs and audience
  - Consider capabilities of different platforms
    - Screen/document sharing
    - Interactive viewing and editing of documents
    - Polling

# Virtual Facilitation: Ideas for Optimizing (continued)

- **Technology support**

- **Allow and schedule time for informal interactions: Focus on rapport/trust**

- **Things will take longer**

- **Listen actively**

- **Increase enthusiasm**

# Virtual Facilitation: Ideas for Optimizing (continued)

- **Consider series of virtual meetings**

  - Increased frequency of contact likely beneficial

- **Consider factors that influence effectiveness of virtual facilitation**

  - Organizational readiness for change (ORC);

  - Other contextual factors (site- and/or provider-level)

  - Innovation complexity (Kilbourne Re-Engage project)

- **Your ideas for optimizing virtual facilitation impact and experience?**

# Updates from 4-1-20

# Implementation Facilitation Learning Collaborative (IFLC)

- **As part of the IFLC call, the group was asked:**
  - Have you been providing virtual facilitation?

  - We want to hear about your experiences!
    - What have you learned?
    - What challenges did you encounter?
    - What solutions have you identified?
    - What are your ideas for optimizing virtual facilitation impact and experience?

      "Every gambler knows the secret to surviving is knowing what to throw away and knowing what to keep"

Have you provided Virtual Implementation Facilitation?

Total responses: 31

- No — 10
- Yes- but we had a Face-to-Face site visit — 13
- Yes- but we had a Face-toFace Training — 3
- Yes- All components were virtual — 5

Implementation Facilitation Learning Collaborative
Participant's experience with virtual implementation
facilitation reported 4-1-20

# Updated strategies for success:

- When leading virtual meetings ask participants to minimize disruptions (close e-mail, skype)

- Join other calls and meetings that you might not normally attend

- Ask how else you can be helpful

- **Recommendations concerning platforms:**

    ○ Ask what they are accustomed to using and most comfortable with

    ○ Remember some locations may not be used to virtual options; don't overestimate their technical savvy… schedule brief 'practice' sessions with them in advance to identify any issues and trouble-shoot

    ○ WebEx

    ○ Pexip

    ○ Apple FaceTime

    ○ Facebook Messenger video chat

    ○ Google Hangouts video

Consider using phone-based technology

◦ Under normal operations, OMHSP strongly recommends use of telehealth first

*However, at the outset of this public health emergency, it is necessary to prioritize telephone services in order to help preserve bandwidth and infrastructure for those who most need video telehealth (and to allow the system to get providers trained and outfitted for doing telehealth for the long-term).*

- **Updated strategies for success: When video may not be an option**

  - Ask for pictures

  - Consider creating a PowerPoint with everyone's picture to be used during introductions

  - During early meetings ask everyone to include a picture to show when they are speaking

  - Ask the attendees to shut down their email at the beginning of the call to minimize distractions

- **Updated strategies for success:**

  ◦ Interactive virtual tour

  ◦ Maps or floorplans

  ◦ Walk through with verbal descriptions of the space

  ◦ Walk through using a virtual platform

- **How do you keep them engaged-
   if you hold em?**

  ◦ Remember: Relationships are critical

  ◦ Fewer formal meetings, but more frequent informal check-ins
    • Skype
    • Text

  ◦ Ask them!

  ◦ Continue to send reports, but only if they want them

- **In sum three things we already know about facilitation**
  - First- be of use
  - Focus on the relationship
  - Be flexible

- **More work is needed**
  - Updated literature review
  - Workgroup of the IFLC to be reconvened
  - Contact <u>Katherine.Dollar@va.gov</u>

# Additional Questions

- **Group Brainstorm**
  - Additional ideas and strategies

  - What else are we missing?

  - Are you aware of new literature or ideas we should be considering?

  - How might the current situation be different?

  - How do we continue to innovate?

  - How do we best continue to inform current implementation facilitation practice during the COVID-19 pandemic?

  "Every hand's a winner and every hand's a loser… "

## References and Resources

- <u>i-PARIHS:</u> Harvey G & Kitson A. PARIHS revisited: from heuristic to integrated framework for the successful implementation of knowledge into practice. *Implement Sci* 2016; 11:33.

- Kirchner JE, et al. <u>Implementation Strategies.</u> In: *Dissemination and Implementation Research in Health: Translating Science to Practice, 2nd Edition.* (Eds: Brownson RC, Colditz GA, Proctor EK). New York: Oxford University Press 2018; pp. 245-266.

- Powell BJ, et al. A refined compilation of implementation strategies: Results from the Expert Recommendations for Implementing Change (ERIC) study. *Implement Sci* 2015; 10:21.

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