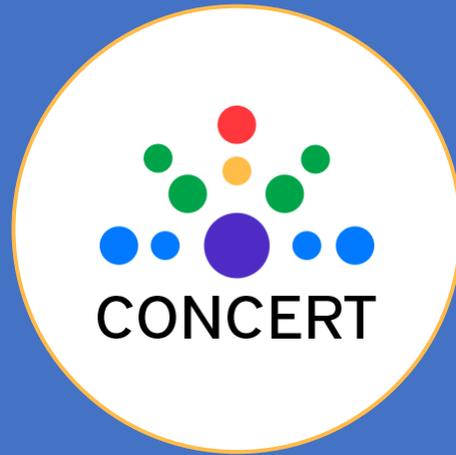In virtual meetings you've attended, what worked well to engage participants?

Virtual facilitation guidance 2.0: Practical tips for engaging groups

CONCERT Team

CONCERT team

- **Co-Directors:**
  - Christine W. Hartmann, Ph.D.
  - A. Lynn Snow, Ph.D.

- **Coaches:**
  - Ryann Engle, M.P.H.
  - Jennie Keleher, M.S.W.
  - Corilyn Ott, Ph.D.
  - Therasia Roland, M.S.W.
  - Sharon Sloup, M.S.N., FNP-BC

- **Program support:**
  - Valerie Clark, M.S.
  - Princess Nash, M.P.H.

Interactive learning

Multiple choice

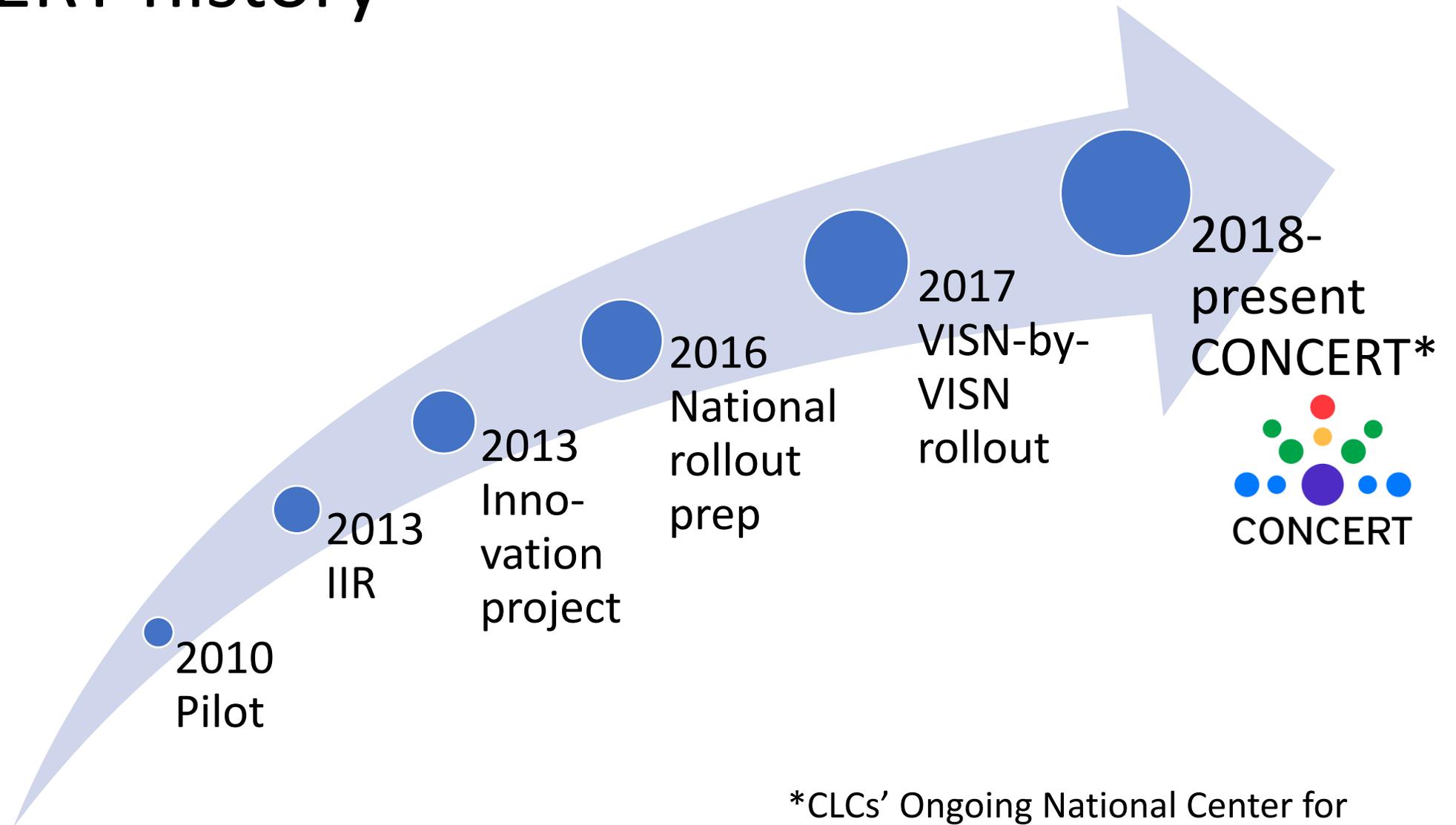1. Question on screen

2. Choose your answer(s)

Write in

1. Type your answer in question box

2. Type your question in question box

Write your answer in the question box

In virtual meetings you've attended, what worked best to engage participants?

CONCERT

CONCERT history

2010
Pilot

2013
IIR

2013
Inno-
vation
project

2016
National
rollout
prep

2017
VISN-by-
VISN
rollout

2018-
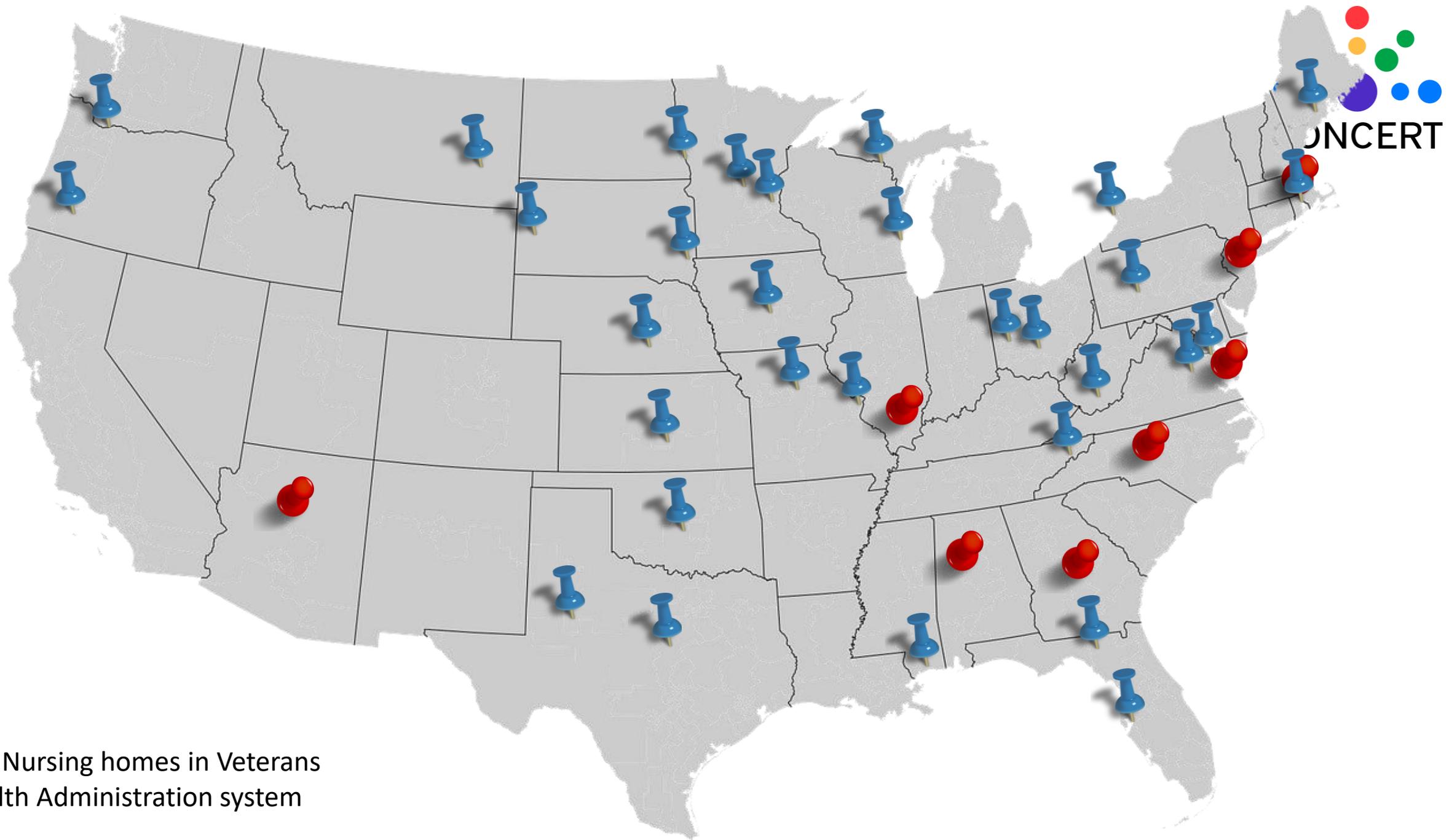present
CONCERT*

CONCERT

*CLCs' Ongoing National Center for
Enhancing Resources and Training

CONCERT

- Supporting Community Living Centers (CLCs) in improving quality

  - Key elements
    - High involvement of staff closest to the Veterans
    - Proactive and preventive
    - Person-centered

- Conducting in-person and virtual learning sessions with all CLCs in the nation

134 Nursing homes in Veterans
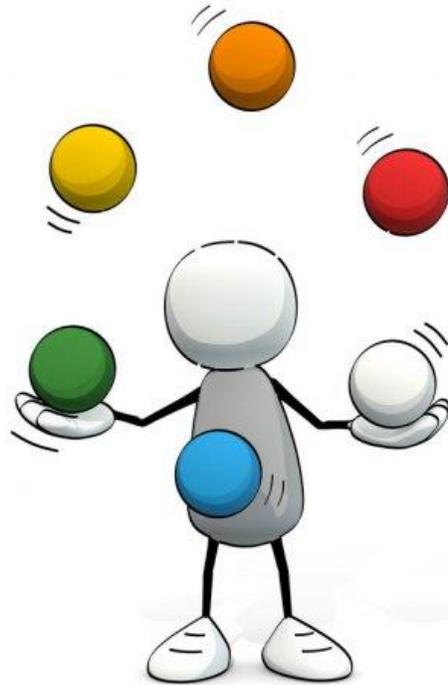Health Administration system

POLL

What differs most between in-person and virtual facilitation? (choose one)

1. Subject matter content
2. Schedule of interactions with participants
3. Facilitator requirement for technical savvy
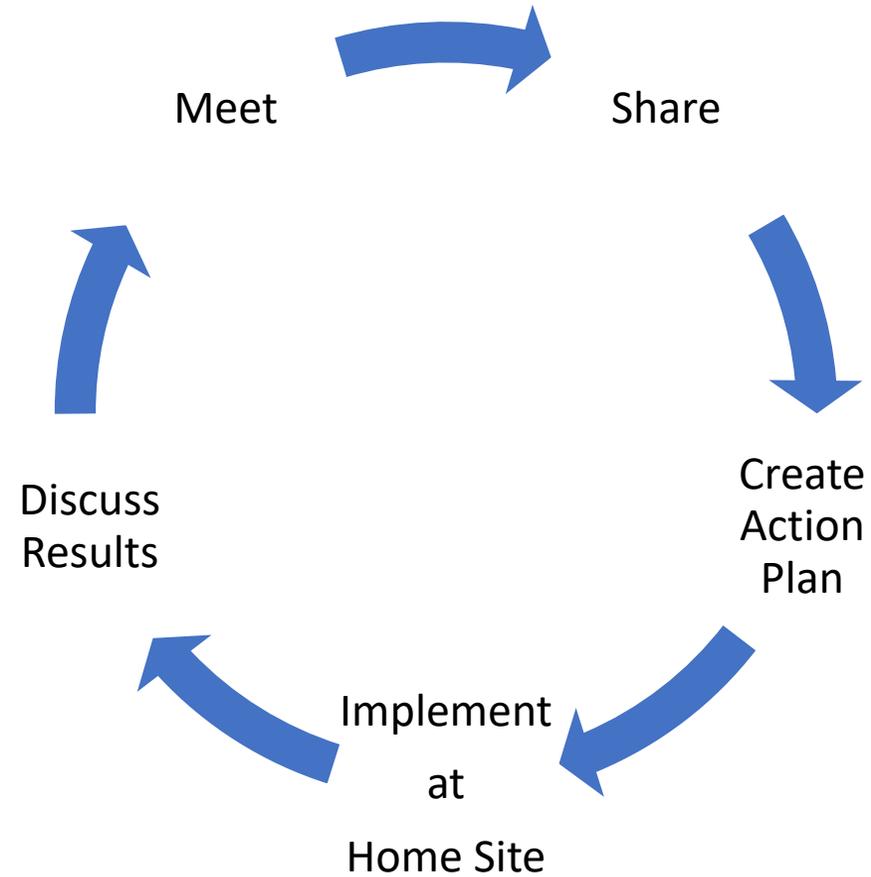4. Methods for engaging participants
5. Agenda organization

Principles

Pilot everything

Pilot and Debrief

IHI's breakthrough series: a collaborative model

CONCERT

Meet

Share

Create Action Plan

Implement at Home Site

Discuss Results

Example action plan

CONCERT

- How will you complete the following?
  1. Huddle with neighborhood staff and interdisciplinary team
     - Review data on pattern of recent falls
     - Ask staff what is contributing to Veteran's falls
  2. Huddle with staff, therapy, restorative, other team members
     - Review whole person "all about me" information
     - Discuss customary routines
     - Ask staff what they see about patterns and the Veteran's needs
  3. Meet with Veteran at site of fall with therapy, restorative, nursing
     - Ask Veteran about fall
     - Observe Veteran functioning
  4. LI team reconvene and debrief
  5. Prepare for VISN-based sharing

Prioritize metacognition

Please share:

▶ Your CLC Name; Your Names/Roles

▶ Set your timer for 5 minutes and share:

▶ Your ahas, lessons learned

▶ What you will now do differently

▶ How you will take this forward

Any questions, comments, or additions?
Use question box

Improving participant learning

Importance of visuals for presenting new knowledge

CONCERT

- Majority of learners are visual learners
  - Never present audio-only content

- Always use visuals to support your content
  - Send documents in advance
  - Draw attention to key pieces of information
  - Convey material in a clear, engaging, and succinct way
  - Design visuals to help keep people on track

FY 20 Learning Intensive ~ Learning Session 3
Implementation Assignment Instructions
March 2020

Choose one Veteran who would benefit from improved uninterrupted sleep:

Prior to learning session:

▶ Track this Veteran's sleep and wake times over 24 hour cycle for 3 days (see attached example tools)

▶ With EVENING AND NIGHT TOUR neighborhood staff who completed sleep tracker, gather this information prior to Day 2 LS 3:

　　▶ Ask staff to describe in depth what happened during their tour related to this Veteran's sleep and wakefulness.

　　▶ Ask what staff think about why the Veteran woke during nighttime hours

　　▶ Bright Spots – ask staff what they do that works to prevent sleep interruptions and what promotes uninterrupted sleep.

LS 3 Day Two: 9am – 12pm local time, Group 1 - March 11; and Group - March 13

1. **Meet with Veteran**

▶ Ask about Veteran's lifetime sleeping and waking routines. Ask about the Veteran's preferences now for when to go to sleep and wake up.

▶ Ask about the Veteran's current sleep experience. Ask what wakes Veteran up at night. Ask what could make their sleep better.

▶ Ask Veteran what activity is meaningful to them to do. Ask Veteran about sunlight exposure and meaningful activity – what happens now and and what they like to do to have happen. Ask how staff can help.

2. **Huddle with Day Tour neighborhood staff,** (LI Leadership team, all Nurse Managers, service line chiefs or designees, and IDT [*e.g. and especially, MH providers, RT, SW, dietary, chaplain*]: (Provide coverage so staff can attend)

▶ Explain importance of restorative sleep (Just in time teaching)
　• Ask if staff think sleep is important for physical and mental health.
　• Ask what staff are like when their sleep is interrupted, for one day, two days, several days. What would they be like if sleep was interrupted every day?

- Ask staff to describe the distressing behaviors in depth

WHAT kinds of behaviors are occurring?

WHEN do these behaviors occur?

WHY are these behaviors occurring?

WHERE are these behaviors occurring?

- Ask staff who have had success with the resident what they do that mitigates the distressing behaviors

Importance of templates for new knowledge

- Template as much as you can for participants
  - Provide structure
  - Enable learners to take home knowledge
  - Help learners apply the knowledge they've gained
  - Support development of key components

U.S. Department of Veterans Affairs

CONCERT Learning Intensive 3 – Learning Session 3 (LS3) – March 2020
Deep Dive and Action Planning Worksheet

CONCERT
Supporting CLCs
Improving Quality

Task	Deep Dive and Action Planning Items	Notes on Findings - Action Plan: Who will do what when
Prior to Deep Dive Meet with evening and night tours	▶ Ask staff to describe in depth what happened during their tour related to this Veteran's sleep and wakefulness. ▶ Ask what staff think about why the Veteran woke during nighttime hours ▶ Bright Spots – ask staff what they do that works to prevent sleep interruptions and what promotes uninterrupted sleep.	Evening tour: • What happened related to sleep and wakefulness: • Why was Veteran awake at night? • Bright spots: What works to support Veteran's sleep? Night tour: • What happened related to sleep and wakefulness: • Why was Veteran awake at night? • Bright spots: What works to support Veteran's sleep?
Deep Dive: Meet	▶ Ask about Veteran's lifetime sleeping and waking routines. Ask about the Veteran's current preferences for when to go to sleep	Lifetime routines:

Any questions, comments, or additions?
Use question box

Improving participant interaction

Build in site-level activities

- Make on-site learning part of the virtual experience
  - Planning
    - Review agenda for potential activity opportunities
    - Build an activity participants can do at their own site
    - Incorporate time in agenda for participants to do that activity at their site before coming back to larger group to debrief
  - Preparation
    - Demonstrate, to the extent you can virtually
    - Participants can role-play exercises before actually performing the activity in "real life"
    - Participants should come back and debrief after their experiences

Reduce group size

- Create facilitated cohorts meeting separately (enables meaningful sharing)

  - Deliberately divide groups into smaller sizes

  - Facilitate smaller cohort learning

Ensure participation in smaller groups

- Deliberately invite each participant into conversation

- Acknowledge off topic comments for later discussion and redirect

- Have attendee list in front of you

- Be mindful of group dynamics

Bring chat box into conversation

- Engage the audience using the chat (particularly if they're muted)
- Monitor chat for comments and questions (content and tech based)
- Work in pairs if possible

Organization

Importance of greeter

IDENTIFY GREETER

BE ONLINE AHEAD OF TIME

PROACTIVE GREETINGS WITH UPBEAT TONE

Importance of introductions

- **Introduce participants as they join**
- **Avoid awkward pauses**
- **Introduce facilitator**

Monitor the clock

Partner for success

- Know your software (Zoom, Webex, Google Meets, Skype)

- Always have a backup

- Devise technical plan
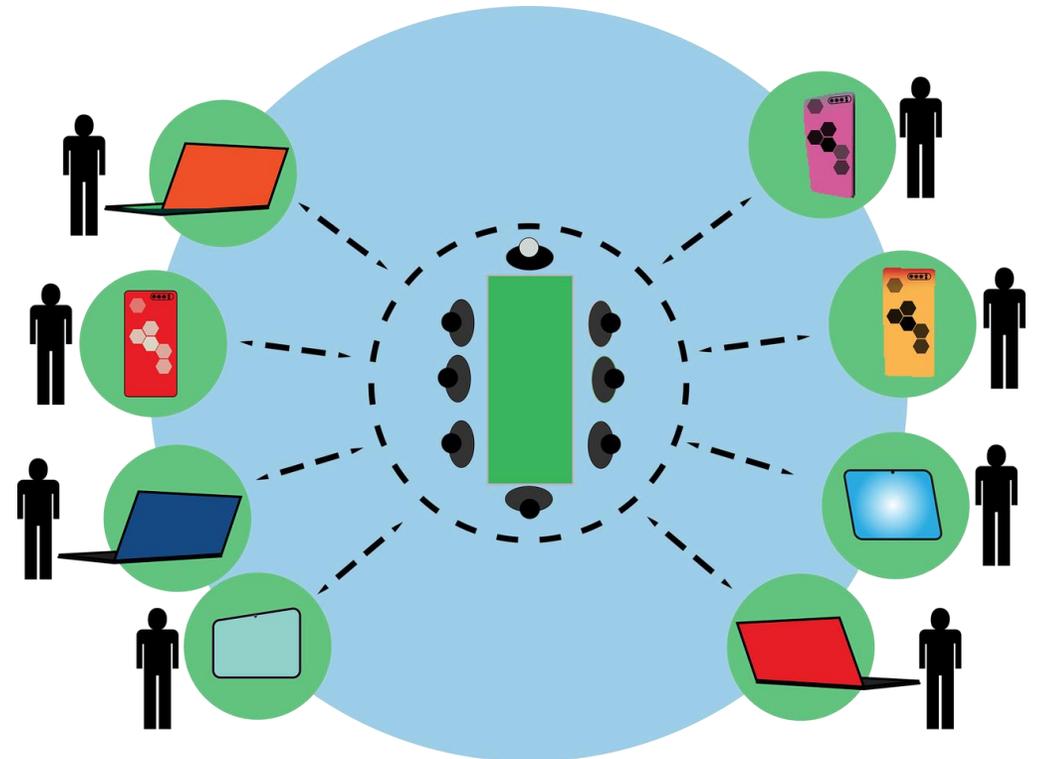
Hosting successful virtual sessions

- Ideal scenario
    - **Person A** facilitates
    - **Person B** takes notes
    - **Person C** provides troubleshooting support

- Tips
    → Run through mock virtual session
    → Assign roles prior to start

Any questions, comments, or additions?
Use question box

Behind-the-scenes

Assign team roles

- Troubleshooting for participants before and during event

- Welcoming participants to the call

- Starting and stopping recording

- Presenting slides

- Screen sharing, advancing slides, etc.

- Moderating the chat box

- Copying the chat box information into Onenote

- Team is in place and ready to perform roles before guest connect to call

Plan for failures

- Team group text

- Backup plans for everything

Any questions, comments, or additions?
Use question box

concert@va.gov TINE