Project ECHO® (Extension for Community Healthcare Outcomes)

Project ECHO Replication -- Steps for Implementation:

I. Getting Started

   a. **Attend ECHO Introduction.** -- Free monthly 90-minute video conference session that consists of a 45 minute presentation by Dr. Sanjeev Arora, followed by a 45-minute question and answer session describing how ECHO® started, how it is implemented, and the next steps for starting a teleECHO™ clinic. See the schedule and register at http://echo.unm.edu/start-an-echo/orientation-events/.

   b. **Attend ECHO Orientation.** -- Free 1-day monthly event in Albuquerque, NM, USA. Overview presentations on all aspects of the ECHO model™ including IT infrastructure and software, how to start a hub-and-spoke system in your community, evaluation approaches, snapshots of programs offered in New Mexico and around the world, and opportunities to view teleECHO clinics live. . Find schedule and register at http://echo.unm.edu/start-an-echo/orientation-events/.

   c. **Become familiar with the ECHO model and gain buy-in and support of key stakeholders.** -- It is important to build support for the ECHO mission and model within your organization, and among legislative, funding, and government stakeholders. We suggest you share with them the clinical journal articles on ECHO outcomes, the TEDxABQ talk, and the New York Times blog article, all found on our website: http://echo.unm.edu/about-echo/press-coverage/

   d. **Identify core hub team members (specialist content experts).** -- Begin to identify the focus and potential of a possible ECHO replication. Reach out to telehealth department leadership and staff during this planning process, as they are often a useful ECHO "home" for the Academic Medical Center or organization, with IT resources, relationships, and expertise that can be applied to ECHO. Assess gaps in care and community needs. Look for areas where the waiting list is very long, and community providers can make a difference. Engage other content experts in the field with strong, supportive communication skills and consider interdisciplinary team members who are specialists in their own field and may complement your team. Guest faculty can provide additional expertise.

   e. **Request and return signed Project ECHO partnership documents. –** The Statement of Collaboration outlines the roles and responsibilities between the ECHO Institute and replicating partner organizations, and the Terms of Use Agreement is a legal contract which serves to protect Project ECHO's Intellectual Property. This needs to be reviewed, revised as necessary, finalized in collaboration with Project ECHO and signed by legal counsel of both the replicating partner and Project ECHO. Contact echoreplication@salud.unm.edu to receive customized partnership documents.

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II.   Immersion

    a. **Gain access to Project ECHO Resource Library on Box.com.** -- This cloud-based resource houses materials created by the ECHO Institute to assist partners in implementing the model, as well as other materials developed by partners around the world as they start their own ECHO programs. Please take from this library, adapt materials for your needs, and share your materials back in this library as they are developed.

    b. **Register and attend Immersion** after confirming approval of partnership documents. Free 2-day hands-on training in Albuquerque covering all the key areas of launching and managing teleECHO clinics: community provider recruitment, curriculum development, budget requirements, IT resources and architecture, evaluation and research tools and approaches, teleECHO clinic management, hub team development, etc. Includes participation in Project ECHO teleECHO sessions. Find schedule and register at http://echo.unm.edu/start-an-echo/orientation-events/

    c. **Confirm understanding of data security best practices, receive IT information sheet, and have ECHO IT team create an iECHO "instance" for your organization.** -- This is the confidential, HIPAA compliant tool that is required by ECHO hubs and used to manage teleECHO clinic activities (contacts, attendance, CME credits given, etc.) to allow for a feedback loop and continued quality improvement of your programs. We will create your own data archive on our server, and provide training for your hub staff to use iECHO.

    d. **Become familiar with ECHO documents** such as the Facilitator Guide, ECHO Etiquette, Scoring Rubrics, Case Presentation Templates, and Staff Roles.[*]

III.   Replication

    a. **Be invited to attend monthly partner learning sessions** via Zoom for ongoing training in various topics associated with building, launching, and maintaining successful ECHO projects such as recruitment of spokes, evaluation, case presentation development, and many more. These monthly sessions are provided in addition to personalized guidance from your assigned Replication Partner Coordinator and others at the ECHO Institute, as well as online video resources to help you move to action.[*]

    b. **Be invited to attend monthly MetaECHO community calls** on the last Friday of every month from 9:30 – 10:30 a.m. MT. As the number of replication sites has grown, a need has arisen for a monthly "ECHO of ECHOs," where new and existing hub sites present and share challenges and describe successes with their ECHO peer network. These sessions allow ECHO programs to discover new and innovative ways of implementing the ECHO model.[*]

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c. **Be invited to attend MetaECHO conference (every 18 months)** which gathers hundreds of Project ECHO's global replication partners, as well as government officials, health policy experts, funders, and philanthropists interested in maximizing the impact of the ECHO model.

d. **Develop budget –** Identify revenue sources and gaps. Use the fillable budget template to determine time percentage (% FTE) and salary assumptions for all staff roles: IT user support, administrative coordinator, nurse manager, and interdisciplinary hub team members.*

e. **Prepare IT infrastructure and receive training & support** -- (teleECHO architecture for hub, telecommunications equipment for spokes, software and IT support):

- Hub needs: Zoom or other teleconferencing system and iECHO software (provided free of charge), large screen display, high definition camera, good microphone

- Spokes need: Microphone/headset, small video camera or PC camera or tablet/smartphone

f. **Recruit and obtain commitments from community participants (spokes). --** This recruitment process generally requires traveling to outlying communities and clinics and giving presentations or Grand Rounds on a disease topic and how the ECHO model will be used to address it.

g. **Develop curriculum and learning objectives. –** Determine whether this will be unique to your program or if there are other ECHO programs that may have or use similar materials. It is highly recommended that you include your learners in the curriculum development process as learner engagement is key to the success of your ECHO.*

h. **Develop program evaluation strategy.***

i. **Create incentives for participation** including special credentialing programs, enhanced knowledge to serve as local experts, national exposure, mini-residencies, research collaboration, reduction of professional isolation, and continuing education credit (CME) -- Check with your institution to find out what types of CME you are accredited for and use those if possible. If your institution isn't accredited for this, determine what type of credit is most useful for your learners and reach out to collaborate with organizations that provide this service.

j. **Develop advertising, graphics, branding, and design strategy. --** Determine branding objectives and accompanying graphics, develop clinic brochure, backdrop with logo, and operational materials including videoconferencing etiquette boards.*

k. **Develop standardized forms and processes for managing teleECHO sessions and cases,** such as case presentation templates, patient recommendation forms, agendas, collaborative agreements with community partners, etc.*****

l. **Hold practice teleECHO sessions ("mock clinics")** to work out problems with IT and connectivity, clinic protocols, videoconferencing etiquette, etc. Use available tools and scorecards to help your team practice appropriate teleECHO etiquette and roles/responsibilities.***** Your assigned Replication Partner Coordinator will be happy to observe and assist in this process.

m. **Launch!** Your assigned Replication Partner Coordinator will plan to observe your first teleECHO clinic. We will also announce your launch to the MetaECHO community in our newsletter and through social media to help share the great news.

IV. Process Improvement

a. **Receive post-launch feedback** -- ECHO Institute, spoke sites, and any additional parties involved will provide feedback to hub verbally and in writing.

b. **Revisit and reinforce all hub expert team teleECHO activities and skills –** Continually reinforce telementoring techniques, videoconferencing etiquette, appropriate clinic management, and use of facilitator guide. Developing a community with a QI mindset within your teleECHO clinic team is essential to success.

c. **Review and revise the case presentation form and curricular outline** – Assess length of form, availability of didactic presenters, and flow of curriculum.

d. **Continue to recruit and train more participants**

e. **Self-evaluation –** Use scoring rubrics and join MetaECHO regularly to gain insights into other ECHO replications and evaluations.

* These materials can be found in the Project ECHO Resource Library on Box.com. Please share your own materials with the MetaECHO community.

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