Cyberseminar Transcript

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Session: Virtual Facilitation Guidance 2.0: Practical tips for engaging groups

Presenter: CONCERT Team

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Christine Kowalski: Thanks everyone for joining today. We really appreciate you taking the time to join our session. My name is Christine Kowalski and I’m an implementation scientist and qualitative analysist for the Center for Evaluation and Implementation Research. And this session is part of our IRG. And the IRG is a learning collaborative where we share our best practices and lessons learned in implementation science. And as a group we’re always working towards advancing the field of implementation science. We currently have over 500 members, and this session today is part of our monthly catalog of events. Our seminars generally take place on the first Thursday of every month at noon. Although, this month our session is off cycle and next month as well, as the session will take place on July 23rd. If you do have feedback about the session today, please do stay on for the survey at the end. Now I would like to thank our presenters and introduce them. And thank them for their work in preparing for the session today. Today we’ll be hearing from Dr. Tina Hartmann and the CONCERT Team. CONCERT is a national center funded by VA’s Office of Geriatrics and Extended Care. And it supports quality improvement in VA’s 134 community living centers. CONCERT has years of experience facilitating in-person as well as virtual quality improvement interventions with large groups, and most recently for 95 sites simultaneously. So they’re going to be talking to us today on Virtual Facilitation. This will really help with COVID and the ways that we’ve all had to modify our implementation work at the current time. So we hope you enjoy the seminar today. And now I’m going to turn things over to the CONCERT Team.

Dr. Christine Hartmann: Thank you so much and thank you Heidi also. We are so excited to be here. I’m Tina Hartmann, Christine Hartmann and I am going to be MC’ing this session. But this is a team effort and the team actually extends beyond our CONCERT Team, but actually to all of you in the audience. We have hundreds of people on this Cyberseminar today and that means that we have hundreds of brains who have experience, especially in this time each one of us has experience in doing some sort of virtual activity. And this question that’s on the screen right now is one that I’m going to ask all of you to address and share your answers. So we’re going to the Cyberseminar mechanism is somewhat clunky, but we’re going to use what we can within this Cyberseminar mechanism, as Heidi eluded to, we’re going to use that question box a lot for all of you. Not just to ask questions but also to share your knowledge and answers. Because all of us can benefit from all of these fantastic brains that are in the room. So I thank you for the introduction and thank you for the opportunity to present. But I thank all of you who are participating in the Cyberseminar in advance for all that you’re going to do to make this an even better presentation than it could have been with just us doing it alone.

So we are here to present about virtual facilitation and to capitalize on all of your knowledge about virtual facilitation.

Our CONCERT Team comprises the members right now that you see here on the screen. Lynn Snow and I are Co-Directors of CONCERT and we have a number of coaches. And every single one of the people on this screen is going to be presenting today. So we have Ryann Engle, Jennie Keleher, Corilyn Ott, Therasia Roland, Sharon Sloup. Those are our coaches, those individuals who work with the CLCs, so those are the nursing homes within the VA system. And the VISN level support as well as national support. And then we have our CONCERT program support without whom none of this would run and that’s Valerie Clark and Princess Nash. And as I said, everyone of us, every member of this team is going to be presenting. And we’re really looking forward to it.

Now to you, to all of you who are going to help make this presentation better, we’re going to do some interactive learning. One of the methods you’re familiar with if you’ve been on HSR&D or QUERI Cyberseminars before which is the poll mechanism. So I won’t even bother to explain that because it’s pretty self-explanatory and I’ll just be handing that over to Heidi when it happens. Then what we’re doing is a little bit unusual if you’ve been on some of my more recent Cyberseminars this year you’ll be familiar with it, but for those of you who aren’t we’re going to use that question box, the one that Heidi talked about that’s potentially minimized or at least on your GoToWebinar dashboard on the side of your screen. Open that up and we’re going to ask you to type your answers to some certain questions in that question box. So that question box is actually going to become an answer box.

And let’s hop right to that, because we’re going to do that right now. That first question that you had, that you saw at the beginning of the presentation, let’s share what your knowledge is about that. So you all have had as I said, we’ve all had many more experiences doing virtual anything. So either as a participant or as a facilitator, what is the one thing that you in your experience think really helps to engage participants in the virtual work that you all are doing? I’m going to give you a minute, we’re going to have some background music for a minute, and then Valerie is going to help pull some of your answers. So please, as I said we’ve got hundreds of people, please use the collective power that’s in this room right now to share your best answers. Okay, I’m going to give you some music and then we’ll get right to your answers. [music 0:05:39 – 0:06:38] Okay, that was a minute, and I’m going to hand it to Valerie for a second. Valerie, can you tell us, I know there have probably been answers streaming in. Can you tell us some of the things that people have written in in terms of their experience of what really worked well to engage participants?

Valerie Clark: Sure. There were quite a few answers. We had polls, breakout rooms, a chat pod that everybody can see. We had, let's see, interesting topics and dynamic delivery methods. Asking questions and typing in the box, just like this. And video seems to help others engage. Also I think small groups are better if you want engagement.

Dr. Christine Hartmann: Perfect, thank you. I know there were probably tens if not hundreds of other answers. But we are also keeping an eye on the clock. And I thank you so much because I took some notes on some of those. Some of those we’re actually going to cover today. Like for example using the chat box or reducing the size of groups so that people can have some in-person interactions. But some of those we won’t touch on. It’s not that we haven’t done them, but we aren’t touching on them today. And I’m sure there are others that came in that we haven’t even thought about. So what I can promise you is that if your answer isn’t read on the air so to speak today, we actually get a copy of everything that everyone wrote in. And what we always do then for our Cyberseminars is to through all of the write-ins. And if there is a ton of information that we think would be really valuable, I will work with Christine Kowalski and make sure that all of you get a copy of that. She can facilitate that. Christine, we didn’t talk about that ahead of time, but heads up because that might be coming your way. So please keep writing in those answers even if yours isn’t the one read. Please know that it will be read after the Cyberseminar. And we will be coordinating things and consolidating that information. So again, we’ve got hundreds of fantastic brains in the room, let’s really capitalize on that. So Valerie, thanks so much for making that first interactive exercise very interactive.

I’m going to give you a little bit of a history of CONCERT so that you understand how we got to the place where we are where we’re facilitating working with a 134 CLCs across the nation. It actually started with work that was research based, it was research studies funded by VA’s HSR&D. First as a pilot study, then as a larger grant. Then a smaller Innovation project just at one site funded by the Office of Patient Centered Care and Cultural Transformation in VA. All of the research results together with our experience on the Innovation project then culminated in a national rollout that was funded by VA’s Office of Geriatrics and Extended Care. Because they were really taken by the results of our research study. And so they wanted to help us implement the results of the research study by fostering improvements in quality of care and person-centered care in CLCs’ nationally. And that is the rest of the trajectory that you see here on this figure.

What does CONCERT really do? Is really to support the CLCs improving their quality of care. We focus on building high interaction, high collaboration teams with frontline staff being heavily involved. Having those teams be proactive and preventive in their care for the residents. And very person-centered. What we have done to train all this and there are, you know if you’re interested in learning more about CONCERT, we can certain share a lot of information about CONCERT. But that’s not the meat. We’re not diving a lot into depth. But what we have done is work with the CLCs to implement these interventions.

And we first worked with 8 CLCs, the 8 lowest performing CLCs in the nation in a mixture in-person virtual facilitation. Next we did a pure virtual facilitation over six months with 31 CLCs. And then didn’t put pins because it was actually rather labor intensive to put these pins on the map, I didn’t put pins for the remaining 95, but it’s all the other CLCs in the nation with whom we’re working now. And the plan had been to do in-person and virtual mixed. We did one in-person, and one virtual, and now because of COVID we are anticipating transitioning purely virtual with the 95 CLCs. So this really encompasses years of experience and that’s what we’re going to share with you here.

So virtual and in-person are potentially somewhat different. And so Heidi, I’m handing it over to you for this poll for the audience.

Heidi: Sorry I just had to unmute myself. So we have a poll question here. What differs most between in-person and virtual facilitation. And it’s a choose one. Subject matter content, schedule of interactions with participants, facilitator requirements for technical savvy, methods for engaging participants or agenda organization. Responses are coming in, we’ll give everyone a few more moments to respond before we close the poll out and go through the results. So this is kind of a complicated poll, so I’m sure people are having to think a little bit. We’ll give you all a few more moments here. Just waiting for things to slow down a little bit. Okay, looks like we’re slowing down, so I’m going to close this out.

And what we’re seeing is 1% of the audience saying subject matter content, 10% schedule of interactions with participant, 20% facilitator requirements for technical savvy, 69% methods for engaging participants, and 1% agenda organization. Thank you everyone.

Dr. Christine Hartmann: Boy, Heidi, thank you so much and thank you everyone for participating the poll. It is really interesting to see everybody’s answers. And I applaud those 1% because in our experience everything on this slide does vary potentially between the in-person and virtual work that we have done. But you’re absolutely right that three and four are in our experience the ones that varied the most. So your collective experience mirrors ours and actually also then mirrors what we’ll be concentrating on in the presentation today. So we’re going to hop right into it and I’m going to hand it over to Lynn to talk about three principles that we use when we are doing virtual facilitation work for implementing things with the field. So Lynn, I’ll hand it over to you.

Dr. Lynn Snow: Thank you so much, Tina. So our first principle and are we on the correct slide? I’m still seeing the poll, but that may just be me.

Heidi: I’m still seeing the poll too. So I’m going to close this, pull this back and re-push it to, Tina. Because I think that it got stuck on the poll there. So Tina, you just need to reaccept. And perfect, there we go.

Dr. Lynn Snow: Okay, wonderful. So one of our first principles is to pilot everything. It’s really one of our cardinal rules for virtual facilitation. Virtual facilitation with high audience engagement really requires your presentation team to juggle many things at once. Here are six important ones that we thought of. You’re juggling the content, you’re juggling the presentation platform, the visual delivery or representation of the content, the audio delivery or representation of the content, the monitoring of your participant responses—perhaps through multiple pathways like the chat box—and the monitoring of responses and feedback from your team members. For example your colleague may be hurriedly texting you behind the scenes to let you know you accidentally skipped a slide. Now if you were putting on a circus act, you definitely practiced juggling six balls before you stepped into the spotlight. So we recommend the same thing, pilot everything. And then debrief. So in addition to piloting you should debrief with your team after your pilot test, have team members whose job it is just to serve as the outside observers during that pilot test and get their input. So that your entire team is ready for prime time when it’s time to step out in the spotlight.

So on our next slide, our next principle is our learning intensives have followed the Institute for Healthcare Improvements breakthrough collaborative model. And that model says that when you’re teaching participants new information have them meet and receive the content, then share about the content, then create an action plan that applies the information to their own situation, then implement at their homesite, and then meet again with the larger group of participants to reflect on what happened and so on. Now when you’re attempting to facilitate high engagement via virtual collaborations, we think you might find that the broad outlines of this model are helpful. The model is built on the idea that adults learn best when we develop knowledge communities so we can share with each other as we go through a continuous learning process. The general model is that your group of participants meet, they receive the content being delivered, they share with each other as they think about how they’ll apply that information, create those action plans, implement and then come back together and report on their experiences. And critically to share with each other how things went.

And so in our next slide, we have an example here of an action plan template that we used recently in one of our own virtual gatherings. So by giving people templates we can ask people to come together, hear our content, and then right in our virtual meeting we can have people breakout into local groups while we have their attention and engagement and to plan how they’re going to implement this new knowledge to their situations. And then critically to come back and present action plans to each other. So these templates allow people to get into these breakout groups and create action plans in an efficient way where they’re really thinking real world about what’s going to happen next. And they’re not getting lost in the task.

This also feeds next into our principle that we’ll show you on this next slide of prioritizing metacognition. Metacognition means stepping back and looking at your own thinking process. And it turns out that adults learn best when they learn new information and then apply that information and then reflect on what happened when they applied that information. And finally reflect on what they’re going to do next time that they have a new behavior opportunity. And so this is another template that we’ve used in our virtual gatherings. This is a metacognition template. In this example we ask participants to come together after a local implementation application exercise. And again we used breakout opportunities to put people into their local teams first for about 15 minutes to reflect on these questions after their implementation experience. And we ask that one team member would serve as a notetaker and another would be preparing to serve as the spokesman for the team. Then we brought all the local teams back together and each spokesperson for each local team shared the information you see here using that template. So again the key point here is that by asking teams to think about their ahas, their lessons learned, what they will keep doing, and what they’re going to do differently that that information is encoded into their long-term memories and they’re much more likely to actually act on this new information at their next opportunity. Further, by then coming back into the larger group and sharing these metacognitive experiences across local teams everyone learns from each other’s experiences and it’s even more likely that this new information is encoded into long-term memory. And more likely that they’ll actually behave differently next time they have an opportunity to apply the information. Back to you, Tina.

Dr. Christine Hartmann: Lynn, thanks so much. And I love that explanation of metacognition. Thank you so much. It’s one of the concepts I had a lot of difficulty understanding in the beginning and you did a fantastic job of explaining that.

But, if there are any questions please use this opportunity, our fantastic audience members, to not only write in questions if you have additional things that you’d like Lynn to clarify about her presentation. And also if you have experience with this principle of piloting everything. If you have experience using the IHI breakthrough series, if you have experience with the concept of metacognition and have things you’d like this room of people that you’re in the room with to know about, please use this opportunity to type in the question box. Because Valerie is standing by monitoring that. And I’m going to ask Valerie to share whether there are any clarifying questions or additions that have come in. And we’re going to be doing this as we go through each of the subsections of our presentation today. So you can if something occurs to you as Heidi said right at the beginning, during that subsection please just go ahead and type it in. Valerie will be sure to record it and then ask. So we don’t have a ton of time to take for questions. But Valerie, if there is one question that you see that is something that you think a lot of people could benefit from knowing the answers about, or if there are things that people are sharing in terms of their own experience that you think the larger group would benefit from, can you please let us know now?

Valerie Clark: Yes. We do have one question. So this is for Lynn, and the question is, are the principles of metacognition also consistent with the principles of Sticky Ideas that you presented at HSR&D?

Dr. Lynn Snow: Oh, thank you for bringing up one of our other favorite concepts which is the concept of how to make an idea sticky. And this comes from the work of Chip and Dan Heath and they say that if you want—you know how like urban legends they just stick your head, there’s something sticky about them. Well it turns out that those ideas are most likely to be simple. So it’s an acronym for SUCCESS. Simple Unexpected Concrete Credible, they generate Emotions, and they tell a Story. So this is somewhat separate from the idea that of how to make an idea sticky. But I will say that both of these concepts do come from the general literature of adult learning. And so in that way they are related to each other.

Dr. Christine Hartmann: Lynn and Valerie, thank you so much. And thanks everybody for the questions. And as I said, if there are things that you are trying to share now and we just don’t have time to get to them, we will be looking at all your answers as we move ahead after this Cyberseminar is over.

Now I’m going to hand over the next subsection about improving participant learning over to Jennie Keleher. Jennie, please take it away.

Jennie Keleher: Okay, thank you, Tina. Hi everyone. I am Jennie Keleher and I will be talking with you about the importance of visuals and templates in your virtual facilitation. So let’s start with visuals. And I just encourage you to keep in mind, the majority of people are visual learners. So you never want to present audio only content. You always want to use visuals to support the content that you’re going to discuss. We have found it to be an excellent practice to send out documents to be reviewed in advance of the training. And we encourage drawing attention to key pieces of information. You can do this by using color, bolding, highlighting, or callout boxes, or shapes. Think about what is needed to convey the material in a clear, engaging and succinct way. And remember you won’t be there in person to engage your audience. Design visuals to help keep people on track during the training.

Now in the next slide I have an example for you. This is a document that we provided attendees prior to a CONCERT learning session. So attendees were able to review this before the session even started. This is helpful. It offers learners the chance to get an idea in their minds of what we will cover. So this is a first opportunity to have you visually reinforce the knowledge that you will be delivering. And remember how I suggested to use color and shapes to draw attention to key pieces of information? Well that’s what I’ve done here for you. Your eyes were likely immediately drawn to that red circle and the bullets that it surrounds. Specifically ask staff to describe in-depth what happened during their tour related to this Veteran’s sleep and wakefulness. And ask what staff think about why the Veteran woke during nighttime hours.

I want you to notice how the next slide will visually review this key information providing additional visual support for the teaching. So ask you can see here I’ve captured and summarize those key bullets that were circled on the handout. And used color and shapes to callout chunks of the new information. Chunking information visually helps to convey it in a clear and succinct way. And it gives people discrete sections to focus on during teaching and discussion. Additionally, for those who may be following along with the along with the handouts sent before the training, this visual helps to keep them on track and engaged.

So moving to the next slide let’s look at the importance of templates. Templating as much as you can for learners will help ensure that key points are reinforced, addressed, and practiced as Lynn was touching on earlier. Templates provide a structure for learners to incorporate the new knowledge into their working knowledge. They give learners a tool that captures what you need them to take home. They help walk your learners through hands on application of the knowledge that they’ve gained, and templates can help learners organize the information in ways that they will use it. Such as action plan format, report back format or train the trainer tools.

And here you’ll see an example. This template was given to our CONCERT learning session attendees. It is set up to walk learners through the application of what they learned in training. And in the red circle notice the repeated bullets from that pre-training handout which were covered again in the training itself. Now they're brought forward here as the take home points. And they remind staff exactly what to do. On the right-hand side of this template the red arrows point to prompts for notetaking. Giving learners a way to organize their findings so they can feed directly into action plan development for a Veteran. And back to you, Tina.

Dr. Christine Hartmann: Jennie, thank you so much and I love all those examples that you had in there. I’m going to pass it over to Valerie and ask were there any comments or questions came in and whether anybody has some additional experience that they are volunteering to share with our larger group about this topic right here, this subtopic.

Valerie Clark: Yeah, quite a few comments came in. Let’s see. About templates, although absolutely appreciated they don’t work for every skill. It’s difficult to create a template say for critical thinking or synthesis skills. So that was one comment. Also what is your definition of a template? And another comment on this section was, similar to the idea of giving people info in advanced review, if we are using a group tech platform people are not familiar with should we have one practice session just for the platform? Start earlier to allow tech learning time?

Dr. Christine Hartmann: Great Valerie, in the interest of time, so I’m going to stop you there but I’m sure there was a bunch more. And as I told everybody already a number of times, we will be looking at all of your answers so please keep putting them in. And so the definition of templates, Jennie do you want to take that on?

Jennie Keleher: Sure. Sure. I do. And I appreciate that question. I think in our experience we are defining that as really a framework to again capture the key points of what we are prioritizing in the training, what we want people to learn, and how we want to help them apply those key points. Really help walk them through the information in a way that helps them to fully digest and incorporate it into their own working knowledge.

Dr. Christine Hartmann: Perfect. Jennie that’s fantastic and that brings in also this concept of metacognition. Because I think a lot of our templates are really focused on helping people with the metacognition piece. And gosh I had the second question in my head, oh about doing a dry run practice. So I’m not clear whether the person who wrote that question meant for the team or doing a practice session with the people on the site. You know we often are working with clinicians who don’t have a lot of experience. We as a team always do, we pile in everything and we do dry runs. We are big believers in both of those. And I will say that for clinicians, busy frontline people who aren’t necessarily easily drawn into things, it would be more difficult to do something like that with them. But we do have champions and so the champions or the leaders of the implementation at that site. We have more engagement with them. And so they become more familiar with the mechanisms. And then they are able to help. So it’s basically a train the trainer approach.

So in the interest of time I’m going to move ahead. But thank you all for making this really interactive on a real time basis. And again if you have questions or comments on the next section please go ahead and start typing those into the question box as we move ahead. Right now I’m going to hand it over to Therasia to start us off with this next session. And then she’ll hand it over to Ryann.

Therasia Roland: All right, thank you so much Tina. So this section references ways to improve our participant interaction in a virtual meeting. So first we have building in site level activities. And this is a great way to improve participant interactions. Making onsite learning part of the virtual experience. Start by planning for the activity. Take a look at your agenda and review it for potential activity opportunities. You’ll want to kinda look for areas in your agenda where you think it’s important to reinforce a concept or a technique that you’ve introduced to your participants and maybe add in an activity there. Build an activity participants can do at their own site. This should be a relatively simple arrangement and easy for the participants to do. Incorporate time in the agenda for participants to do that activity at their site before coming back to the larger group to debrief. As an example in our CONCERT learning intensive we built a set timeframe in the agenda during things like huddles instruction to have participants go back to their sites, conduct their huddles for the first time, then come back together and reconnect over the phone with us to debrief and share their experiences. This has really proven to be a very valuable activity to help participants examine how they’ve applied what they’ve learned and to kinda get some feedback and adapt their approaches in real-time. Next after planning is preparation. So try to if you can and to the extent that you can, virtually try to demonstrate what the activity should look like as a guide for your participants to model. Participants can get acclimated to the content by roleplaying exercises before actually performing the activity in real life. And participants should come back and debrief after their experiences.

All right. So another helpful way is to reduce group size. Create a facilitated cohorts meetings separately. And this helps to enable meaningful sharing. So again break the larger group into smaller facilitated cohorts that meet separately for meaningful sharing. Doing this and doing this deliberately divide the groups into smaller sizes. So groups could be divided in ways that optimize diversity, whatever this says, disciplinary diversity or different approaches or different individuals to promote a richer more inclusive discussion. For example you could do a round robin where everyone just calls out a number for their assigned group. So you can always use another method of kind of randomly rounding out your groups as well. Facilitate smaller cohort unity. In order to do this it helps to foster a sense of collaboration among the participants having them work together as peers. Coaching each other and helping one another work through the application of what they’ve learned and sharing their experiences to help reinforce concepts and techniques. It definitely makes for better participants experience all around. So with that I’ll hand it over to my colleague Ryann for the next part of this section.

Ryann Engle: Great thanks, Therasia. So once you’ve got your smaller cohorts you want to make sure that you’re able to really facilitate each individual’s participation in that group. So deliberately inviting each participant into the conversation as Therese mentioned, maybe you do a round robin where you go around the call and actually call on everybody to provide their individual input. You also want to acknowledge if off topic comments come up and put those aside for later discussion and redirect the conversation back to the topic at hand. So you might use the concept of a parking lot to save these topics for later. The parking lot could be a virtual whiteboard in your online meetings. It could be a Word doc you have up or even just a piece of paper that the facilitator has to keep track of those topics and come back to at a later time. You want to have the attendee list or possible attendees in front of you. It’s helpful to keep track of who’s on the call and also being able to call people by name to make sure you’re getting their input. And being mindful of group dynamics. You might have supervisors, leaders, frontline staff in these smaller cohorts. So just being mindful if there are power dynamics going on in the groups. If certain people are overpowering the conversation or monopolizing the conversation, really kind of acknowledging their point but then calling specifically on other people that have been quiet during the call so that you’re really getting opinions and viewpoints from everybody there. And ultimately you know we’re really just trying to make this a safe space so everybody can contribute and learn from each other during these virtual facilitations.

And then much like Tina and Valerie have done today in this Cyberseminar, you want to bring the chat box into the conversation. So engage the audience using the chat particularly if the audience is muted. And like today asking them to type answers to questions in the chat box or their experiences with the topic at hand and then making sure you address those when possible. It’s also helpful if there are tech issues to identify and help problem shoot tech issues. So monitoring the chat for comments and questions. And then working in pairs if possible. So having one person that’s facilitating the audio discussion and then one person who’s really monitoring the chat box. Kinda like Valerie is doing today to bring those comments to everyone’s attention. And back to you Tina.

Dr. Christine Hartmann: Ryann and Therasia, thank you both so much. Really excellent examples.

And we’re going to open it up for questions or additions that the audience has that they would like to share. Valerie have things come in that you’d like to share with us or questions that you have pass onto Ryann or Therasia?

Valerie Clark: Yes. The chat box has been busy. We did receive one comment about, I recently heard community garden instead of parking lot, I thought this was a really creative idea. But there were several questions about how we’re defining group size, and what do we consider a small group size?

Dr. Christine Hartmann: Great question. So I love the community garden. That is a much more positive and active image than a parking lot. So we may well adopt that. Thank you very much for that suggestion. And in terms of group size, Ryann or Therasia, would you like to take that one?

Therasia Roland: This is Therasia\_

Dr. Christine Hartmann: Ryann how about you go first? Oh, go ahead, Therasia, please.

Therasia Roland: Oh, no, I was just going to say really quickly I think that’s something that you may want to do at your discretion depending upon the size of your main group. You do want to make sure that in the smaller groups that they’re not too large where you can, where everyone gets to maximize their peer to peer communication with everyone else. And that they’re not too large where it’s just like basically a smaller version of the large group. So you have to, I would advise just to find a balance between the two. That’s all I have, thanks.

Dr. Christine Hartmann: That’s wonderful, Therasia, thank you. And Ryann, do you have anything to add to that?

Ryann Engle: I don't think so too much. I think Therasia did a great job. I just think it’s a hard question to have a definite answer on because each interaction kind of has a different purpose. So when you’re thinking about group size considering what the purpose of the virtual call or meeting is as you try to narrow down what that group size might be.

Dr. Christine Hartmann: Fantastic. And Valerie, thanks for bringing that to our attention. And Ryann thanks, and Therasia thanks for your answers.

And I am in the interest of time going to move on to organization and hand it over to Sharon first and then Princess.

Sharon Sloup: Hi, great, thank you, Tina, and hello everyone. I’m just really excited to be able to talk to you today about the greeter and the facilitator role. And as you start your virtual session it’s going to be really important to identify a greeter. First, you’re going to want to have a team member identified as the greeter. And this person needs to be prepared for the call. Then we’ll need to know who’s going to be joining the call and that really includes both attendees and presenters. Now I gotta be honest with you, when I take on the role as greeter, before I even call into a session, one of the things that I have found is helpful before I get started is really the prep period which we talked about. I think Therasia was talking about earlier. And that’s having everything ready, the proper material and making sure my office is all picked up. So that there’s no distractions. I think this helps me feel present and in my zone so I can give my full attention to those that are calling in. I also find it’s helpful to picture everyone as if they’re right there with me in the same room. Now the greeter also needs to know who the facilitator is going to be on the call. And this is also going to be a team member that you will be handing off the call to at the appropriate time. So as a greeter, it’s going to be important to be online ahead of time and be the first person on the call. This really shows the attendees that you’re prepared, and that they’ve come to the right place. And if at all possible, have a welcome page up on the screen with a program name and a start time. The greeter should identify themselves, have an upbeat tone, and really try to avoid that awkward silence. So let me ask you a question, as an attendee coming on a call, which would make you feel more welcomed? This? [silence 0:43:02 – 0:43:05] Or this? Good morning, this is Sharon with the CONCERT Team. If you’re just joining us today and you’re here for the CONCERT learning session three, I just wanted to let you know you’re in the right place.

So as we move to the next slide, the next thing I want to talk about is the importance of the introductions. And as the greeter you should really introduce your participants when they join. And I know some of you might be thinking that’s really hard because sometimes we have these large groups. And if you can’t introduce participants by name, introducing them by CLC or VISN makes them feel important. And as attendees join, welcome them and let others know that they’re on the call. This will allow you to keep a running list, so you know who joins the call and who does not join the call. And this is important because you know who’s expected. And also you have other team members that are working behind the scene, help them reach out to these sites in order to make sure that they have the proper information needed to connect, or see if they have other technical difficulties that your team can help them with. And as a greeter I have found that it’s again really important to avoid pauses. And you know as in the previous example I gave you, have you ever joined that call and all you hear is silence and you think to yourself, and I know I’ve been there, am I in the right place? Did the call get canceled? And it’s real quiet and you hear someone get on and they go, hello? You know instead of that silence at the beginning, use that time to really get to know your attendees. And I found that if you do this people tend to open up on the call, which will later allow for some great discussions. It also lets those know that are just coming on the call that you’re there, and it’s a really great opportunity to make any early announcements that you might have before the call starts. And in addition to those items that I just talked about, you as the greeter are going to want to introduce your facilitator. So at the appropriate time set by your team introduce and turn the call over to the facilitator.

Now on the next slide what I want to talk about now after I’ve discussed the greeter is the facilitator. So it’s going to be very important to let the audience know who is facilitating. But now that the greeter has done this amazing job and you’ve handed off the call to the facilitator, the facilitator can give a quick introduction letting the audience know he or she will be on the call and what to expect. There are some important responsibilities of a good facilitator that I put together. And I want to share these with you today. The facilitator should be fully present. Prepare in advance. The facilitator should plan and distribute an agenda with the help of their amazing team. Establish expectations so the audience knows what to expect. And also, state your objectives at the beginning. And it’s important to guide the team in presenting and sharing information. And lastly, provide closure and reiterate action items if needed.

Now on the next slide there is one last role of the facilitator. And I wanted to make sure I mention this today. And that’s the importance of monitoring the clock. So as the facilitator it is important to help your presenters and team keep on task and stay on time. And this really works best when this time is planned ahead with each presenter and team member. And you know how long each portion of the discussion is going to take. And it’s okay to let your attendees know how long each portion will last. So again, they have that expectation and they’re well informed. And it’s also going to be helpful to have the group text ahead of time. And have the team, text your team ahead of time so that if there’s any problems they can remind each other when time is getting close or if there is a concern for running over. We’re all communicating with each other. And lastly, and mostly importantly, try to stick to the time that was originally set. Because everybody’s time is so precious and so you always want to start on time and stop on time. Princess, I’m going to turn it over to you now.

Princess Nash: Thank you, Sharon. So the next slide we’re going to look at partnering for success. It’s essential that you not only know which program will work best for your needs but also think about the platform from an attendees’ perspective. Try to be prepared to troubleshoot issues and always have a backup plan. So there’s several virtual software that you can use like, Zoom, Webex, Google Meets, and Skype. And each of these come with their pros and cons. It’s always good to troubleshoot beforehand with a coworker. Try to send yourself an invitation and run through what it looks like when you set up. So you have to set it up so that participants can enter before you the host can enter? Do you have to set a limit to how many people can be on the platform at one time? Or will you need to open up more lines? Things to think about. When you’re running through this it’s always good have a backup plan. A backup plan allows you to switch platforms if something unexpected happens in the middle of a meeting or at the beginning of the meeting. And it’s helpful to devise a technical plan with all of your coworkers working behind the scene. A well devised technical plan can alleviate frustration from everyone involved. Next slide.

Next slide? Oh, thank you.

Heidi: It’s up.

Princess Nash: Got it. So hosting virtual sessions successfully. What does an ideal hosting situation look like? And Ryann touched on this a bit earlier. But ideally you will have a minimum of three individuals that will each play a different role. So you’ll see here that person A could be the one that’s facilitating the session. Person B is your behind the scenes notetaker, which in this case is Valerie who is monitoring chat boxes for us. Thank you, Valerie. And then person C is providing troubleshooting support in case someone logs in and their audio isn’t working, or they can’t see the video, or the [inaudible 0:49:39]. And all of these people are in constant communication through the entire virtual session. The last few tips here, it’s always good to have that mock virtual session that I discussed earlier. So sending yourself the invite, going through a dry run with you and a colleague, and know who has which role prior to the start of the virtual session. So that there’s no confusion on which person should be doing which task. And then, next slide.

We have any questions, comments, or additions for this section.

Dr. Christine Hartmann: Princess and Sharon, thank you so much. Both of you did an outstanding job providing concrete examples. And Valerie, I’m very aware of the time. That’s my role here as the facilitator. And I think we have time maybe for one quick question, but otherwise I want to make sure to get to what Corilyn is going to present as well. So is there one quick question or comment that you could pull out?

Valerie Clark: Yeah, there’s one thing that has come up a few times throughout our presentation is a question about which platform is best for virtual breakout sessions? This is\_ So from our experience, which one has worked best for us?

Dr. Christine Hartmann: So and for those who are joining from outside the VA we will also say that our experience is limited to what is available within the VA system. And that is constantly changing. But Princess, why don’t you field that question just really quickly for now, in our experience given the current situation in VA, what’s your best guess?

Princess Nash: My, I’m leaning towards Webex. We’ve had pretty good success with connection, audio, visual with Webex has been pretty good moving forward. Within VA only, Skype works well for small groups. It seems to have a little bit more difficulty with handling larger connection, larger groups. But Webex I think is my top pick as of now, today.

Dr. Christine Hartmann: Right, because Teams is coming our way too and we’ve had a little bit of work with Teams, but not at its full capacity. So sorry to be less concrete than the question maybe wanted. But thank you very much for that question. And Valerie, thanks for bringing that up, and I’m going to hand it over to Corilyn to talk about the behind the scenes.

Because as numerous people have mentioned already, if you don’t have good behind the scenes you won’t have good on the stage. So Corilyn, take it away.

Dr. Corilyn Ott: All right, thank you Tina. So each team member as was mentioned has assigned roles. And as you’ve heard the team talk about these roles, they’ve done a really good job. But let me kind of summarize these roles and highlight some of the important points. So to start with we have someone who does the troubleshooting as Princess just talked about. And this person is in charge of helping the participants before and during the event. And it’s very important that someone other than the presenter is in charge of handling any technical issues that arise. Because we certainly don’t want that presenter to be bogged down with that. You heard Sharon talk about having someone there to welcome the participants. So this person needs to be very energetic and a good conversationalist. And Sharon did a great job of explaining those duties, so I won’t go into that anymore. But it’s also important to have someone other than the presenter start and stop the recording. Sometimes the presenter will share their screen and advance their own slides, but other times this role is given to one of the team members like Tina is doing today. Another very important role is the moderating of the chat box, which we’ve talked about multiple times. And how this person either answers the questions themselves, or appropriately communicates the information to the presenter. Also someone is in charge of copying and saving the chat box. And we put that into OneNote so that we can go back and always see what was talked about and answer questions later if needed. And finally was also mentioned, the team is in place and ready to perform their roles 15 minutes before guests to connect to the call. And this allows us time to work out any kinks that may arise.

On the next slide, speaking of kinks, the best laid plans of mice and men often go awry. So it’s always important to anticipate potential failures. As you’ve heard mentioned several times, we create a group text that is sent to all members of the team the morning of the call. Be sure to include the guest speaker if this is applicable. But this text is usually initiated by the codirector in our case. This text provides a platform to communicate and troubleshoot between, behind the scenes. So for example a recent we got fed, good morning CONCERT BF and SW. Here is our troubleshooting group text for today. Then during our presentation we exchange important information that allows us to have smooth transitions without participants even knowing what’s going on behind the scenes. So later in the thread we received a text that said this, SW just so you know, BF has dropped off the call due to technical problems. So unless they let us know they get back on, don’t reserve time for their comment. The next text read; we’re back on. Conversations like these go on continually with our team without causing interruptions with the presentation. Secondly, we have backup plans for everything. And Princess also talked about this. So be sure to obtain the guest speaker’s cellphone number. Sometimes the guest speaker is not part of the VA system so it’s important to have a direct contact number for them. And whether it’s computer or phone connections you know there’s often issues with getting connected or staying connected. And we always have a secondary platform lined up to connect to visually and also the VANTS line set up as a last resort. Finally, there are times when team members will get pulled away to cover other duties. So we also have backup plans for coverage of each members role. Back to you, Tina.

Dr. Christine Hartmann: Corilyn, thank you so much. And we are almost exactly at the top of the hour. I know there probably have been questions coming in. Hopefully we’ve fielded a lot of these as we have been going along.

But before we get to any final maybe just one question or comment, you may contact us at any time at this VA email address that is on the screen right now. CONCERT at VA dot gov. And we are happy to share any of the materials, agendas, tip sheets, we have numerous things that we’ve put together over our years of experience and we’re happy to share them with anyone who is interested. So please don’t hesitate to get in touch with us.

So Valerie, if there’s one quick comment that we can address in about 30 seconds, please let us know. Otherwise I’m going to hand it back to Heidi and Christine, who actually may hand it back to me. So is there one last thing?

Valerie Clark: I think another topic that’s come up a few times is, how to ensure engagement during times when participants are working at their own site? Like how do you ensure engagement when you don’t have them in the actual group?

Dr. Christine Hartmann: Great. Corilyn, do you want to take that?

Dr. Corilyn Ott: Well I can try. I think part of that is having that template and they know what it is that they are being asked to do. So they know that they need to present that information when they get back with us. So it helps them to know what to look for and then know how to present it and know that they’re expected to do that. So just giving the expectations I think helps.

Dr. Christine Hartmann: Thank you so much. And thank you to the whole team. Christine and Heidi, do you have things that you need to say since we’re right at the top of the hour?

Heidi: Yep. We are just about at the top of the hour. I just want to quick before the audience logging off let everyone know that when you log off there will be a feedback form. Please take a few moments to fill this out. We really do appreciate all of your feedback. Tina, do you have any final remarks you’d like to make quick before we close it out?

Dr. Christine Hartmann: Yes, thank you so much. I’d just like to thank first of all our fantastic CONCERT Team, and the fantastic audience. It’s really so valuable when all of you share your community and collective knowledge with all of us together. We know this is a somewhat awkward presentation format. But you have made it so much better because we were able to learn from you and you all were able to learn from each other. So we’d just like to extend a huge thank you for taking time to participate in this Cyberseminar. And back to you Heidi and Christine.

Heidi: Fantastic. Thank you, Tina. And I want to thank the audience for joining us today. And I really want to thank the entire presenter team today. You guys did such a wonderful job sharing all of this information, collecting all of this and putting it together for us. So we really do appreciate all of that. We are at the top of the hour; Christine did you have anything you want to say quick before we close it out?

Christine Kowalski: Just another big thank you to Tina and the whole CONCERT Team. This is really outstanding. Thank you so much for your work in presenting this. And I hope that all of the attendees will join us again next month.

[END OF AUDIO]