Introduction guide on how to become a Project ECHO hub
Steps for implementation

Introduction

Thank you for your interest in Project ECHO®. This guide provides background on the ECHO model and information on the preparation involved in your hospice becoming an ECHO hub. The key steps outlined below include familiarization with Project ECHO, consideration of how best to utilise ECHO in your initial ECHO network, completing the process of signing up to becoming an ECHO Hub, attending a three day immersion training, launching your first ECHO and evaluating your network, before multiplying your experience for other ECHO networks.

Hospice UK will be offering regular immersion training from early 2018. When we have received your application, and the subsequent legal documentation has been approved, you will be offered a place at the next available training. We will notify you when the application form is available from the end of August 2017.

1. Getting started

Get familiar with Project ECHO and gain buy-in and support of key stakeholders

To get started with ECHO, it is important to spend some time understanding how the model was developed and what it can achieve. Building support for the ECHO mission and model within your organisation and among stakeholders and funders is another key part to preparing to become an ECHO hub. The videos and articles below can help with this.

Videos

- View this TEDx talk (12:13 minutes) by Project ECHO founder, Dr Sanjeev Aurora. In his talk, Dr Aurora shares the story of ECHO and his vision for how the ECHO model can change the world fast.
- Also watch this brief overview of ECHO (1:45 minutes).
- Watch this introduction to ECHO for hospices (7:50 minutes) by Professor Max Watson Project ECHO programme director.
Articles
You will find a whole host of clinical journal and news articles on ECHO outcomes on the Project ECHO website. These are two good ones to start with:

- **Project ECHO: An Effective Means of Increasing Palliative Care Capacity**, in The American Journal of Managed Care (AJMC) Evidence Based Oncology.

Project ECHO methodology in a nutshell
ECHO works with existing communities – connecting “spokes” with each other and with a “hub”. (In the context of ECHO, a spoke is a community partner site at which individual or team learners is located and a hub is a regional centre at which subject matter experts are located.)

Chosen spoke and hub members have initial face to face meeting, if possible, at which they establish a curriculum, times, dates, evaluation and responsibility for which spokes will present at each meeting.

Each ECHO meeting is 75-120 minutes long and involves:

- 20-30 minutes PowerPoint teaching from the hub on the agreed curriculum
- 2/3 case presentations from spokes based on a template followed by ‘community of practice’ discussions
- starting and finishing on time
- facilitation by trained facilitator
- support from dedicated IT and administration staff.

All sessions are filmed and, along with additional materials, this forms an online library that grows with the sessions and which can be accessed by the network community of practice.

Key elements of a successful ECHO network

- **Democratizing specialist knowledge** – That specialist knowledge can be of the latest research in a disease or the specialist knowledge of a patient and their family and community.
- **Tele-mentoring** – Through providing peer and specialist support isolated practice can be reduced and better decisions can be taken closer to the patient.
- **Building a community of practice** – a body of committed practitioners teaching and learning from each other to improve clinical decision making across the network.

2. Identify core hub and spoke team members

*What do you want to do with ECHO?*

Begin to identify the focus and potential of your first ECHO network. We strongly recommend that you start with one network and that you learn from that network and then multiply your learning into other networks. We also recommend that for your first ECHO that you engage with a network with which you are already familiar and who are already familiar in some way with your own hub team.
Once you have your ECHO network running well then there is a real opportunity to invite key collaborators to sit in on your ECHO to build awareness and collaborations which can make use of ECHO methodology in your area. Assess gaps in care and community needs, for example, 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 multidisciplinary team members who are specialists in their own field and may complement your team.

Many of our partners are keen to use ECHO in relation to nursing homes in their areas. By using ECHO a strong community of practice can be developed across the involved nursing homes, particularly if they are already known to your own teams. However, there have been many nursing home initiatives in recent years and nursing home staff are familiar with being told what they should be doing. It is thus crucial in establishing such a network that the curriculum is chosen by the nursing home teams based on what their front-line staff have identified as key areas of learning need.

3. Consider how your own models of service delivery could be enhanced by using such methodology

**How could you sustain new service models in the future?**

Project ECHO is a key enabler of the overall five-year strategy to open up hospice care, holding the potential to enable hospices across the UK to maximise their impact by engaging with more communities of practice who often miss out on accessing palliative care input when they need it most. The proven approach and methodology of Project ECHO can enable organisations to consider how they could develop new service delivery models and how such models could be commissioned and sustained long term.

- Who might support new ways of extending care to more patients and families?
- How could you demonstrate to a commissioner the impact of an ECHO facilitated service such that they would seek to fund it as part of your statutory service?

We hope that Project ECHO will give us a tool to explore different ways of “democratizing” our specialist knowledge and working with others to improve the care of those approaching the end of life. Importantly, ECHO can help the hospice sector to explore new service models in order to meet the rapidly growing need for palliative care across the UK.
4. Complete application form with details of your first Intended ECHO project.

If you are then ready to commit to becoming an ECHO partner we request that you fill in the application form which will be available on the Hospice UK website from the end of August. Subject to confirmation by the Project ECHO board at Hospice UK you will then be sent two documents.

The **Statement of Collaboration** which outlines the roles and responsibilities between the ECHO Institute and your organisation. It also outlines the responsibilities of the replicating partner, Hospice UK, in training and supporting and overseeing your ECHO development.

The **Terms of Use Agreement** is a legal contract which serves to protect Project ECHO’s Intellectual Property. Your application will be finalised in collaboration with Project ECHO and signed by legal counsel of both the replicating partner and Project ECHO. Once you are a fully authorised partner, you will have access to a large library of materials in ECHO Box, including ECHO PowerPoints (such as those given by Dr Sanjeev Arora and palliative care ECHO partners from across the world) to present or revise to meet your needs. (BOX is a web sharing platform accessible to all ECHO partners.) As a partner, you will also have access to Zoom software and to iECHO which is the database and collating programme which has been created specifically to help the smooth running of ECHO meetings.

**Partnership document: guiding principles**

Collaboration with ECHO requires:

**Replication Statement of Collaboration** – front-end document that outlines the roles and responsibilities of both partners in any replication collaboration.

**IP Terms of Use Contract** – Legally binding agreement that details all the elements of the Statement of Collaboration, with a specific focus on intellectual property (IP) issues.

What do you agree to?

- Follow the ECHO mission and model.
- Use the ECHO name and trademarks.
- Mutual expectation of sharing.
- Use iECHO.
- No selling ECHO IP to outside third parties.

**Attend one of the webinars before December 2017**

These webinars will involve a short overview followed by question and answers and will be available on a first come first served basis. They will give you the opportunity to use the software Zoom, and give you the chance to have your questions answered before the next stage of becoming a signed up ECHO partner. Details of the webinars will be on the Hospice UK website and will be shared via special ECHO bulletin.
The ECHO Institute in Albuquerque insists that these documents are signed before coming to immersion training. This means that you need to consider what the name of your hub is going to be so that the legal documents are appropriately configured.

5. Consider logos/names/branding

The issues surrounding branding, naming and logos have caused various challenges over the years, and have resulted in more comprehensive and consistent policies. In relation to names and logos the ECHO Institute set out the following guidelines.

- **Name**: The name of the hub will be based on or identical to the organisational name used in signing the ECHO partnership documents. For example, the Hospice UK ECHO is called: Project ECHO Hospice UK London. We avoid using acronyms. We do not want names that are too broad (claim turf) or too narrow (disease or topic-specific), but rather are specific to the hub organisation and location.

  The ECHO name needs to be built into the name of every program related to ECHO. We expect hubs to use the ECHO name and their customised ECHO logo in all written, online, published and marketing materials.

- **Logos**: Logos will need to be created or approved by the ECHO Institute which we will co-ordinate at Hospice UK.

- **Branding**: Our partnership documents state that hubs must use the ECHO name and logo in all written, published, online and marketing materials. In addition, we expect that every hub will create an ECHO banner using the customized ECHO logo and that will be prominently displayed in view of the camera during all ECHO sessions or teleECHO clinics. Immersion training to start your own ECHO

6. Identify your ECHO team

We suggest that your own network ECHO Implementation Team comprise of:

- at least one context expert or specialist (particularly important to include the team lead or “champion”),
- other members of your anticipated ECHO HUB Team who will provide the facilitation of your ECHO Network Sessions,
- an Administrative /Co-ordination Lead, and IT Co-ordinator/Technician (three to four persons in total).

7. Register and attend immersion training
If your organisation is ready to replicate ECHO and has signed the partnership documents, we offer a three-day training programme into the ECHO model and next steps for implementation. The three-day interactive programme will cover all the key areas of launching and managing your teleECHO Network: community provider recruitment, curriculum development, IT resources and architecture, evaluation and research tools and approaches, teleECHO network management, hub team development, etc. The training includes, importantly, actual participation in ECHO Network sessions.

Immersion training will

- allow you to **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 run their own ECHO programmes in the spirit of ECHO collaboration. Please take from this library, adapt materials for your needs, and share your materials back in this library as they are developed.

- **confirm the ECHO data security best practices**, and the ECHO IT team will create an iECHO “instance” for your organisation. This is the confidential tool that ECHO hubs are required to use to manage their ECHO Network Sessions, (contacts, attendance, etc.) in addition to allowing a feedback loop and continued quality improvement of your programmes. We provide training for your hub staff to use iECHO.

- allow you to **become familiar with key ECHO documents**. This includes the Facilitator Guide, ECHO Etiquette, Case Presentation Templates, and Staff Roles.

Hospice UK intends to run immersion training at three centres across the UK, in early 2018. These centres are London, Sheffield and Inverness. Through immersion, you will develop an ongoing relationship with our ECHO Team, who will assist you in setting up your own teleECHO Network. Currently we are seeking central funding to help support the cost of this training, but if unsuccessful the training, materials, ongoing support and backup from Hospice UK is costed at £1000 per person attending immersion training. Each hub would be required to send a minimum of three participants to the training.

### 8. Pre-launch support

The ECHO team at Hospice UK will be your first line of contact for help and support for ECHO issues, some of which are listed below.

As part of the ECHO community you will also have the opportunity to:

**Attend monthly partner learning sessions, with Project ECHO, NM.**

Sessions are delivered via Zoom and include 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

---

1 To be reviewed in Dec 2018.
provided in addition to personalised guidance from Project ECHO at Hospice UK, as well as online video resources to help you.

**Join our monthly MetaECHO community calls on** the last Friday of every month from 9:30 – 10:30 a.m. MT, (4.30 – 5.30pm GMT). 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 programmes to discover new and innovative ways of implementing the ECHO model.*

**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.

**Develop budget plans and commissioning strategies**
Identify revenue sources and gaps. Use the fillable budget template provided by the ECHO institute to determine time percentage (% FTE) and salary assumptions for all staff roles: IT user support, administrative coordinator, facilitator/clinical leads, and multidisciplinary hub team members.*

**Prepare IT infrastructure and receive training and support**
This includes teleECHO architecture for hub, telecommunications equipment for spokes, software and IT support:
- Hub needs: Zoom and iECHO software, large screen display, high definition camera, good microphone
- Spokes need: Microphone/headset, small video camera or PC camera or tablet/smartphone
Full details will be given at the immersion training.

**Develop curriculum and learning objectives**
Determine whether this will be unique to your programme or if there are other ECHO programmes 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.*

**Develop a programme evaluation strategy,** and learn from strategies employed by others across the world ECHO community.

**Develop advertising, graphics, branding, and design strategy**
Determine branding objectives and accompanying graphics, develop ECHO Network programme leaflet, backdrop with logo, and operational materials including videoconferencing etiquette boards.*
Develop standardised forms and processes for managing teleECHO sessions and cases, such as case presentation templates, agendas.

Hold practice teleECHO sessions (‘mock clinics’)
Run practice sessions to work out problems with IT and connectivity, videoconferencing etiquette, etc. Use available tools to help your team practice appropriate teleECHO etiquette and roles/responsibilities.

9. Launch!
Hospice UK 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.

10. Ongoing process improvement

Receive post-launch feedback – Project ECHO Hospice UK, spoke sites, and any additional parties involved will provide feedback to hub verbally and in writing.

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

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

Continue to recruit and train more participants.
Self-evaluation – Use evaluation forms and join MetaECHO regularly to gain insights into other ECHO replications and evaluations.

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

Contact us: If you have any questions or comments, please get in touch with the team by emailing echo@hospiceuk.org.
<table>
<thead>
<tr>
<th>Term</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>ECHO®</td>
<td>Extension for Community Healthcare Outcomes</td>
</tr>
<tr>
<td>ECHO Institute™</td>
<td>Project ECHO’s headquarters and physical location at UNMHSC in Albuquerque, NM. Provides training/technical assistance relating to replication efforts.</td>
</tr>
<tr>
<td>ECHO Model™</td>
<td>Developed as a platform for both healthcare service delivery and research in June 2003, the ECHO model develops knowledge and capacity among community networkians through: a) case-based learning, b) knowledge networks, and c) learning loops.</td>
</tr>
<tr>
<td>Force Multiplication</td>
<td>Refers to an exponential increase in workforce capacity created through the ECHO model. Utilizing telementoring and guided practice ECHO builds system capacity by empowering primary care providers to gain new knowledge and expertise to treat patients in their own communities.</td>
</tr>
<tr>
<td>Hub</td>
<td>Regional center at which multidisciplinary team of subject matter experts is located.</td>
</tr>
<tr>
<td>iECHO</td>
<td>Project ECHO’s web-based partner relations management tool that is used to manage and audit teleECHO networks, collect data on ECHO network performance, and provide online resources to partners.</td>
</tr>
<tr>
<td>Mock ECHO</td>
<td>Practice teleECHO networks that are designed to prepare hub team members for launching live teleECHO networks.</td>
</tr>
<tr>
<td>Network Coordinator</td>
<td>Project ECHO employee who is responsible for the administrative and organizational component of a network; as well as provide guidance information to network participants and guest speakers.</td>
</tr>
<tr>
<td>Network Manager</td>
<td>Project ECHO manager with networkal experience who assists in curriculum development for the educational and training component of the network, assists in coordinating network functions and provides managerial support to the network coordinators.</td>
</tr>
<tr>
<td>Project ECHO®</td>
<td>Distance learning model in which subject matter experts mentor teams via videoconferencing to share specialty expertise and knowledge; use of technology to leverage scarce resources and create inter-professional knowledge networks, case-based learning, standardization of best practices to reduce variation, and tracking of data.</td>
</tr>
<tr>
<td>Spoke</td>
<td>Community partner site at which individual or team or learners is located and connects to hub via teleECHO networks.</td>
</tr>
<tr>
<td>Superhub</td>
<td>Project ECHO partner, that has the ability to sign partnership documents, train, and provide ongoing support to replication partners in the same way that the ECHO Institute’s Replication Team does. These teams have received a special superhub training to learn to recruit, teach and support replication partners through the implementation process.</td>
</tr>
<tr>
<td>TeleECHO™ Network</td>
<td>Term used to describe regularly scheduled videoconferencing sessions among subject matter experts and learners which use the ECHO model, including didactic presentations and case-based learning to create learning loops.</td>
</tr>
<tr>
<td>Telementoring</td>
<td>Term used to describe the guided mentoring relationship that develops during a teleECHO network using videoconferencing technology.</td>
</tr>
</tbody>
</table>

GLOSSARY OF TERMS
<table>
<thead>
<tr>
<th>Term</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>UNMHSC</td>
<td>University of New Mexico Health Sciences Center, where Project ECHO and the</td>
</tr>
<tr>
<td></td>
<td>ECHO Institute are based in Albuquerque, NM</td>
</tr>
<tr>
<td>User Support Analyst</td>
<td>Project ECHO IT employee dedicated to managing and coordinating participant</td>
</tr>
<tr>
<td></td>
<td>technological connections to the teleECHO networks.</td>
</tr>
<tr>
<td>VTC</td>
<td>Video teleconferencing; participation in teleECHO networks via video connection</td>
</tr>
<tr>
<td>Zoom</td>
<td>Teleconferencing software used for teleECHO networks</td>
</tr>
</tbody>
</table>