Name: _____

Project ECHO Planning Worksheet for _____:

<div style="text-align:right">(your organization)</div>

This can serve as a planning guide, which might also be useful for preparing a proposal for funding. Filling in this sheet will also provide you with information on next steps, possible challenges, and help you focus on extracting relevant information from the different sessions you attend during Immersion.

Part 1: Analysis and history   Focus Area: Pre-work
(you should answer these questions before coming to immersion, if not, we will help you find these answers)

1. What challenge/issue do you want to address? What will be the focus of your ECHO?

[ ]

2. Why?

[ ]

3. How does lack of access to this specialty knowledge result in poor outcomes?

- An analysis of _____ *(the topic or reason for your ECHO)* indicates that the problem has been linked to *(check the boxes that apply)*
    - ❑ Increased _____
    - ❑ Unnecessary _____
    - ❑ Longer _____
    - ❑ Poor outcomes in terms of _____
    - ❑ Poor follow-up
    - ❑ Other _____

4. What is your special expertise you want to share in order to amplify your impact? What can others learn from you that would be valuable to them?

- Tell us about your organization's expertise or role in this arena:

[ ]

5. What gap or need in the community will your ECHO address? How has the gap been documented?

- A "gap analysis" shows inadequate expertise exists in _____ *(area)*, based on:
    - o *National data*
    - o *Flow of referrals to specialists*

o *Government, academic or reports from professional organizations*

o

> **ECHO is a model that demonopolizes specialty knowledge and expands access to critical care or services. The "sweet spot" for ECHO is to target issues of complexity, which require guided practice and ongoing mentoring, particularly areas where other forms of training or capacity building fall short.**

6. How much do you already know about Project ECHO? Attend <u>ECHO Introduction</u>, a 90-minute videoconference session to learn more. This is a great opportunity to hear an overview of the ECHO model and how it started, interact with others learning about ECHO for the first time, and meet members of the ECHO team.

- What makes your target problem a "good fit" for the ECHO model?

7. What other partner organizations are you working with or plan to engage?

Part 2: Hubs and spokes   Focus Area: Replication Step-by-Step
(you should try to answer these questions during this session)

> **ECHO is a "hub" and "spoke" model creating multi-directional knowledge networks.**

8. What will your multidisciplinary (hub) look like? In this visioning, don't be constrained, create your "fantasy football" team… what kinds of expertise contribute to "best practice" in this field?

❏ Specialist/Subject Matter Expert(s)

❏ Specialists/Subject Matter Experts from related disciplines

❏ Specialists, Subject Matter Experts with interest in this area

_____

❏ Quality Improvement Expert
❏ Case Manager
❏ Social Worker
❏ Preventionist
❏ Financial Expert
❏ Legal Expert
❏ Others

9. Who will be part of your staff team for administrative tasks and technical assistance?

❑ Clinic Coordinator   ❑ Program/Project Manager

❑ IT Staff   ❑ Others _____

10. Who are your likely learners/participants or "spokes"?

11. Will your initial ECHO be closed (invitation only) or open to anyone who wants to join?

12. Do you already have a well-established network of learners? If yes, explain.

13. If not, you will need to recruit these participants or spokes.

- How many spoke participants in how many places do you want to include in the initial ECHO?

_____

- How many spoke participants in how many places do you want to include over time? We recommend 25 as a good target.

_____

- Where will your spoke sites be located?

❑ Public schools   ❑ Non-Profits

❑ Training Facilities/Professional Schools   ❑ Hospitals

❑ Professional Organizations   ❑ Medical schools

❑ Business or Service Centers   ❑ University clinics

❑ Private providers   ❑ Correctional facilities

❑ Governmental organizations   ❑ Federally Qualified Health Centers

❑ Non-Profits   ❑ Rehab facilities

❑ Community health clinics   ❑ Other_____

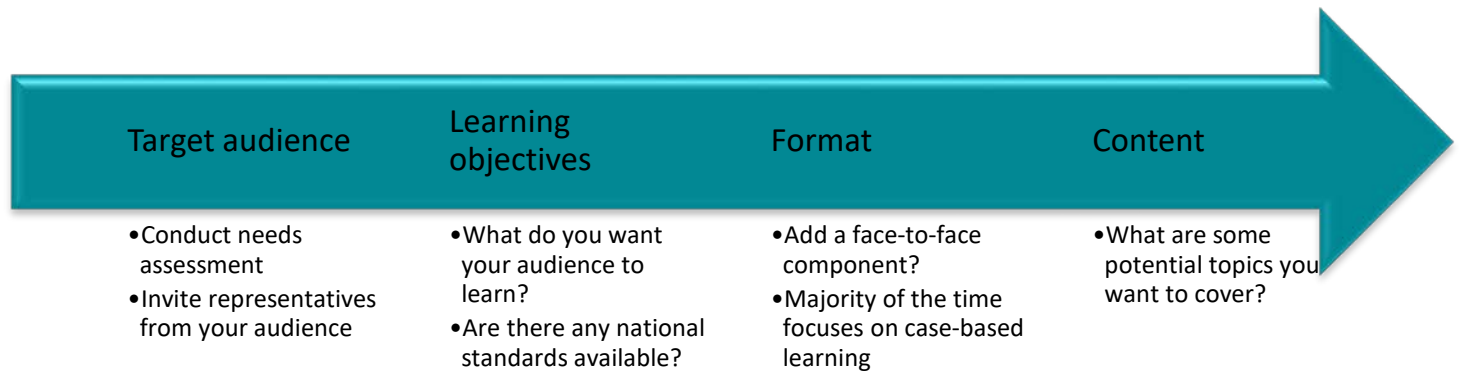| Potential Spoke Site	What do you know about site? (# of patients/participants, challenges, strengths, etc.)	What is your relationship?	Whom do you know? (any potential champions?)

- What is the status of the internet capacity to support Zoom videoconferencing [>1 Mbps] at these sites?
  (Use letter codes: a – reliable, b – don't know, c – unstable, d – no internet)
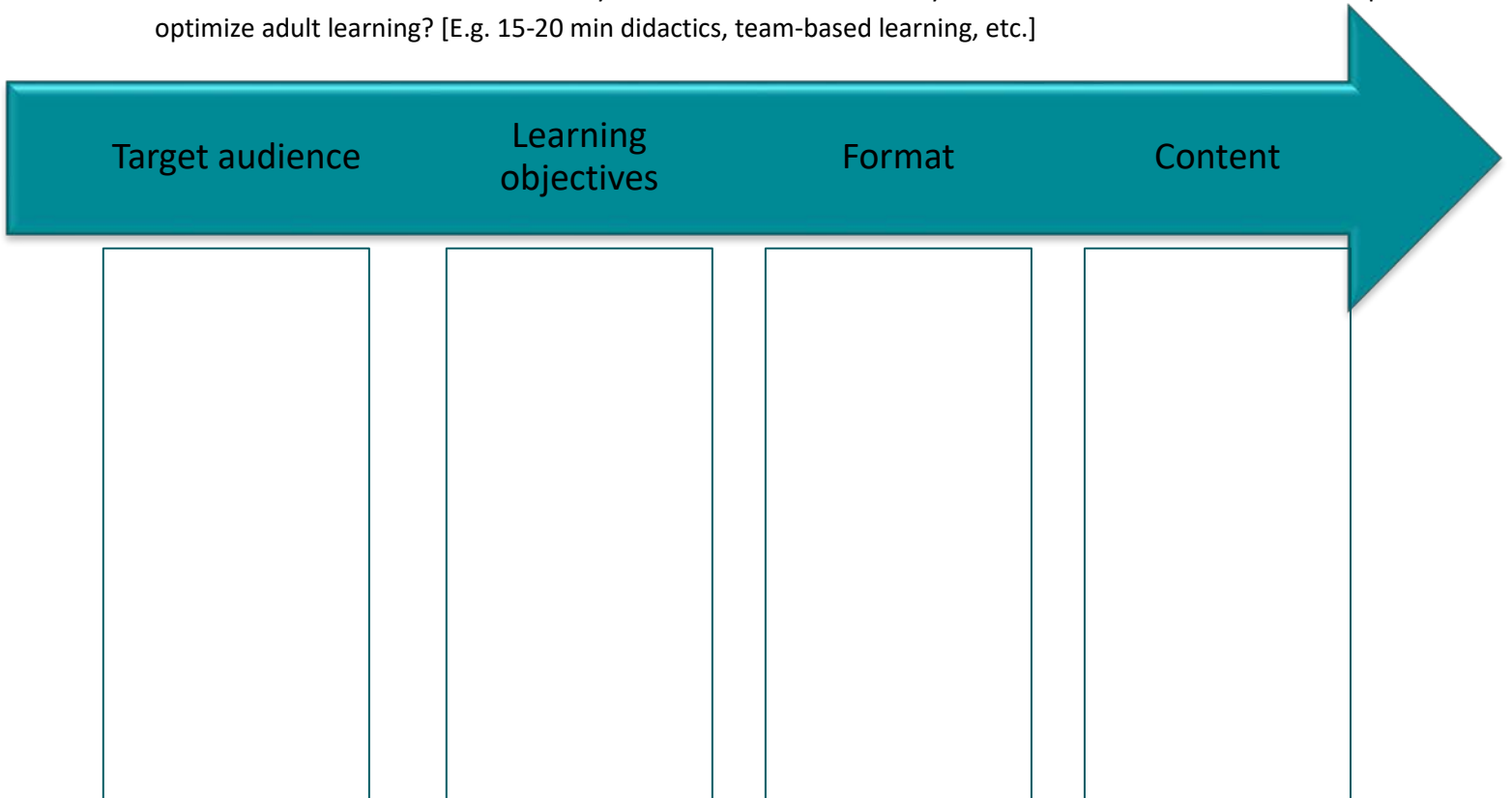
Part 3: Curriculum Design   Focus Area: Curriculum & Case Presentation
(you should try to answer these questions during this session)

> **Besides case presentations, your targeted learners should be given the opportunity each week to benefit from didactics presented by experts in the field supported by references and contain at least three main learning objectives.   We recommend didactics to be between 15-20 minutes in length with time for questions. An ideal didactic curriculum should be inter-professional in scope and might follow these steps for its creation:**

Target audience	Learning objectives	Format	Content
• Conduct needs assessment • Invite representatives from your audience	• What do you want your audience to learn? • Are there any national standards available?	• Add a face-to-face component? • Majority of the time focuses on case-based learning	• What are some potential topics you want to cover?

14. What will YOUR curriculum cover? Do you have a curriculum already? Will it need to be modified and adapted to optimize adult learning? [E.g. 15-20 min didactics, team-based learning, etc.]

Target audience	Learning objectives	Format	Content

15. Based on the idea you outlined above and through the process of ECHO telementoring, what are some of the potential competencies that participants will demonstrate?

a. _____

b. _____

c. _____

d. _____

e. _____

f. _____

Part 4: Evaluation   Focus Area: Evaluation Strategies and Resources
(you should try to answer these questions during this session)

16. How will you measure improvement in the above competencies? Consider outcomes and as well as training. How do you get data on the problem you are addressing?

17. How will you know if your program is successful? To what degree do you expect the problem to be solved or lessened as a result of ECHO?

18. What kinds of educational credits, certificates, or other incentives for participation will you offer and who will provide them (which institution)?

Part 5: Funding

Focus Area: Strategic Planning

(you should try to brainstorm about these questions during this session)

> **In our experience, funding follows the creation or implementation of successful ECHOs, not the other way around. Often, organizations have funding (grants, contracts, department funds, etc.) to do the work that you want to amplify with ECHO. ECHO can often help you deliver on this work more effectively and efficiently, without requiring additional funding to begin.**

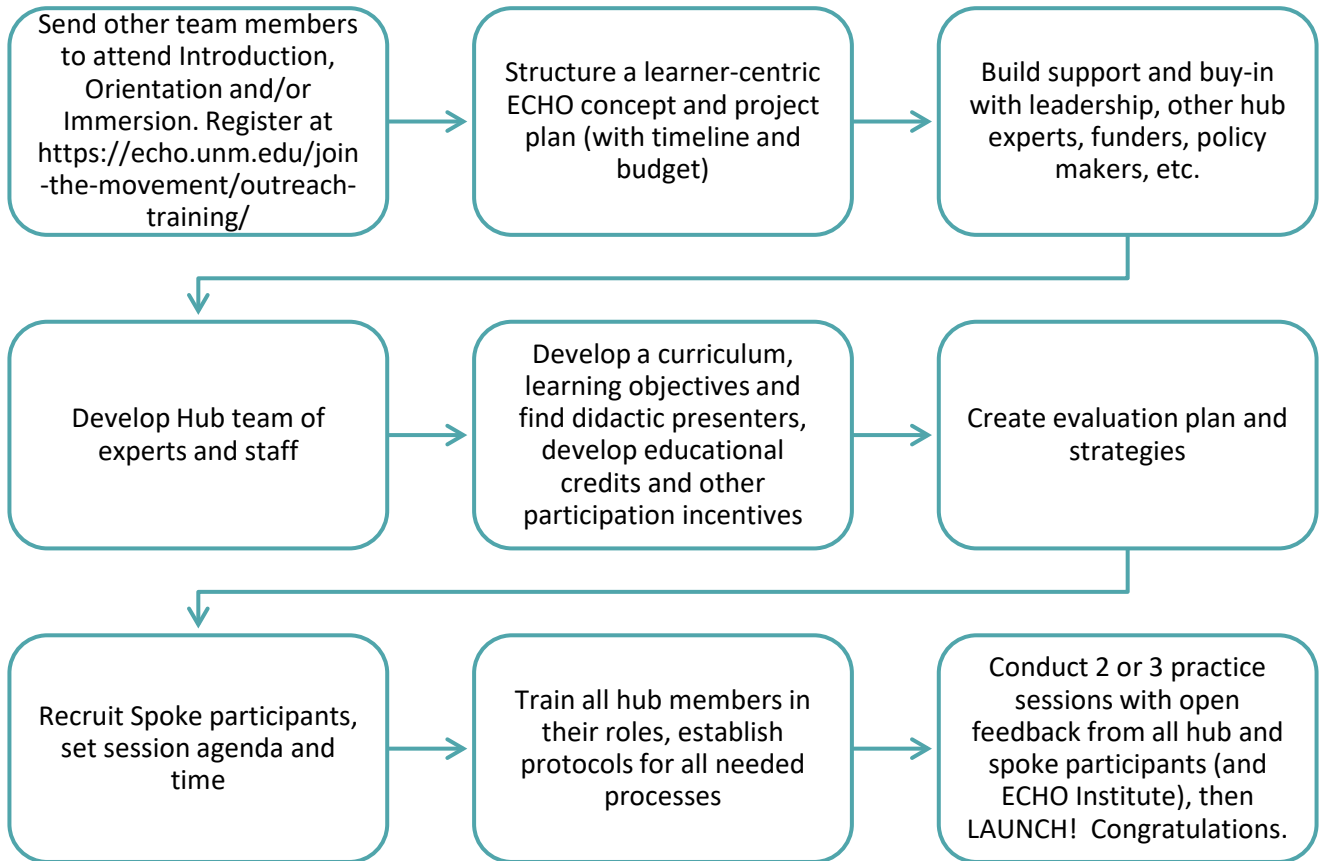19. What funding do you already have that you can leverage to support your ECHO?

20. What additional funding do you think you will require?

21. What ideas do you have regarding funding sources (immediate and longer term)?

Part 6: Next Steps

Focus Area: Post-work

(you should answer these questions after Immersion with the help of your PL)

Send other team members to attend Introduction, Orientation and/or Immersion. Register at https://echo.unm.edu/join-the-movement/outreach-training/	Structure a learner-centric ECHO concept and project plan (with timeline and budget)	Build support and buy-in with leadership, other hub experts, funders, policy makers, etc.
Develop Hub team of experts and staff	Develop a curriculum, learning objectives and find didactic presenters, develop educational credits and other participation incentives	Create evaluation plan and strategies
Recruit Spoke participants, set session agenda and time	Train all hub members in their roles, establish protocols for all needed processes	Conduct 2 or 3 practice sessions with open feedback from all hub and spoke participants (and ECHO Institute), then LAUNCH! Congratulations.

22. What Challenges do you foresee?

23. How can we assist you in next steps or in overcoming challenges?