

## Facilitator's Guide

A good facilitator's main objectives are to:

1. Keep the teleECHO™ clinic focused on the subject of discussion
2. Provide a neutral perspective and manage the process
3. Keep the teleECHO™ clinic agenda on track in an efficient and relaxed manner
4. Help the participants grasp the material presented and discussed
5. Help facilitate an open, nonthreatening environment

### Effective Communication Skills for Facilitators

Communication skills are critical for a facilitator in order to gain support and run the sessions efficiently and effectively.

- **Active Listening:**
  - Be genuinely interested in other people's thoughts and feelings.
  - Listen intently and avoid side conversations/texting, etc.
  - Maintain good eye contact with video participants.
  - Don't confuse content and delivery – assume the person has something to say even if she or he is having trouble saying it.
  - Focus your energy and attention on what is being said to you – not on what you want to say next – and allow the speaker to complete their sentence/though.
  - Help speakers avoid rambling by asking direct questions to help them come to their main point.
  - Ask open-ended questions when prompting is required. (i.e. "Tell us more about the liver exam.")
  - Be aware of your own emotional response to the discussion– it will affect how well you understand and respond. Maintain a friendly, attentive facial expression.
  - Cultivate empathy – try to put yourself in their shoes (e.g. you have done a wonderful job taking care of such a complex patient, let us explore how we can assist you further).
  - Show encouragement. Use simple gestures or phrases to show you are listening (e.g., say "Uh-huh," nod your head, thank you so much for your detailed presentation).
  - Show support. Say, "That's great; does anyone else have anything to add?"
  - Paraphrase or summarize what the person said and get agreement that you've understood completely (e.g...Your main question for the group is what other treatments can be tried for this patient is that correct?)
- **Model** the behavior you want to see. Be non-judgmental and avoid negative nonverbal messages.
- **Focus attention and help pace:** Keep the group on the topic and focused, trying to limit or reduce repetition. (e.g. "Thank you Dr. Smith for your recommendation. We will hold that for discussion as right now we are inquiring about clarifying questions for the presenter.")
- **Allow adequate time/opportunity** for participants to respond. Wait in silence when opening up the floor for questions/discussion for 5 to 10 seconds.

## Project ECHO® (Extension for Community Healthcare Outcomes)

- **Scan/Observe:** encourage full participation from the group. Watch spoke participants for nonverbal cues in the form of body movement, facial expression, gesture (which may indicate loss of attention, confusion, or discontent). Change the pace or the topic if needed to re-engage participants.
- **Inclusion:** Make sure everyone has an equal opportunity to participate. Start by engaging audio, video, and then in-person participants. It is easy to ‘forget’ about participants on audio as you cannot ‘see’ them. Encourage those who have been silent. Encourage input from particular professions or spoke sites who have not yet commented.

### Managing Difficult Behaviors of Team Members

A participant’s behavior may directly and negatively impact the team’s productivity or hinder the team’s cohesiveness in terms of openness, trust, commitment, and participation.

- Never scold or embarrass an individual. Focus on the behavior in a positive fashion with the goal to reduce/alter/eliminate the member’s undesirable behaviors without hurting his/her self-esteem or capability to contribute. (i.e. Participant: “I have read that nitroglycerin is an effective treatment for headaches.” Facilitator: “Thank you for your comments. I am not aware that nitroglycerin can be utilized for headache treatment. Do you mind sending me the literature on this?” The facilitator could contact the participant offline to discuss further.)
- If there are individuals that are dominating the discussion, be direct but tactful. (i.e. “We would like to hear from a participant that has not had an opportunity to respond.” “John, you have made several contributions and we thank you for your participation. We also want to hear how other group members see this issue”. Alternately, the facilitator could reach out to the individual prior to the next session and talk candidly about their behavior in private.

### Body Language and Facilitation

Awareness and optimal use of verbal and nonverbal communication is critical to facilitation of the teleECHO™ clinic. Be careful not to send nonverbal cues that can be interpreted as negative by the receiving audience. Examples include rolling eyes, raising eyebrows, grimacing, or shaking one’s head. Facilitators should be aware of the nonverbal cues given off by team members with whom they are working. Crossing arms, rolling eyes, and texting can suggest closed mindedness or inattentiveness. This type of body language subtly inhibits the free flow of communication.

### Personal Attributes of an Effective Facilitator

- Personal and cultural self-awareness (be aware of your biases)
- Patience and flexibility
- Enthusiasm and commitment
- Interpersonal sensitivity
- Accepting of differences
- Empathy
- Sense of humility
- Sense of humor

### Facilitation Suggestions

- Be aware of the physical environment and how it may influence behavior. Things to consider:
  - For video/audio participants
    - Provide information on audiovisual needs and connection information
    - Remind individuals of videoconferencing etiquette
    - Send electronic copies of the presentation, agenda, and sign in sheet (if applicable)
  - For in-person participants
    - Room setup (arrange chairs to face camera, etc.)
    - Comfortable room temperature
    - Remind participants about environmental etiquette, i.e. loud food/drink, rustling of papers, side conversations, mobile devices
    - Provide necessary documents for teleECHO™ clinic: copy of presentation, agenda, sign in sheet (if applicable)
- Start the teleECHO™ clinic with introductions and announcements including :
  - Identify main and co-facilitators
  - Review the agenda
  - Ask for questions prior to the start of the teleECHO™ clinic session
  - Communicate ground rules
    - May be done outside of clinic time in a welcome email or recited during clinic
    - Always introduce yourself prior to speaking (generally say your name/location before speaking – this helps participants that are on the audio follow the conversation as they cannot see who is speaking)
    - Maintain confidentiality: HIPAA. Personal health information (PHI) compliance
    - Limit environmental distractions (rustling of papers, stay muted when not speaking, etc.)
    - Respect one another – it is ok to disagree but please do so respectfully
    - Encourage participation from *all* participants
- When possible, call on participants by name
- Identify and take advantage of ‘teachable’ moments (“Thank you for your comment Dr. Smith. Could you please define hyperalgesia for the group.”)
- If you have a lead facilitation role, close each session with a recognition of the presenter and group for “job well done.”
- After each teleECHO™ clinic session, huddle with your team and discuss what went well and what can be improved on and make changes as necessary



