Introduction guide on how to become a Project ECHO hub

Steps for implementation

(Date updated: July 2024)

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 familiarisation 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 Partner Launch training, launching your first ECHO and evaluating your network, before multiplying your experience for other ECHO networks.

Hospice UK offers regular Partner Launch training in Belfast, Inverness, London, and Sheffield (dates are available on our website). 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.

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) or introduction to ECHO for non-hospice organisations 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:

- Hierarchy disruptors: bringing specialist knowledge from hospital to community care, in The British Medical Journal
- AMA Steps Forward module: Adopting the ECHO Model
- The Power to Cure, Multiplied, The New York Times.

The ECHO Model™

The ECHO Model develops knowledge and capacity among community practitioners and professionals through ongoing virtual mentoring and education. Backed by more than 400 peer-reviewed research articles, the model has proven effective across disciplines and geographies. The ECHO Model is based on four core pillars:

1. Use technology to leverage scarce resources
2. Share best practices to reduce disparities
3. Use case-based learning to master complexity
4. Use a web-based database to monitor outcomes.

Project ECHO methodology in a nutshell

ECHO works with existing communities – connecting "participants" with each other and with a "hub". (In the context of ECHO, a participant learning site is in which an individual or team learners are located and a hub is a regional centre at which subject matter experts are located).
Participants and hub members have initial meeting, at which they establish a curriculum, times, dates, evaluation and responsibility for which participants will present at each meeting.
Each ECHO meeting is 75-120 minutes long and usually involves:

- 20-30 minutes PowerPoint teaching from the hub on the agreed curriculum.
- 1-2 case presentations from participants 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 recorded 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.

2. Identify core hub members and participants

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 that 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 Hospice UK's 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.

Project ECHO thus has the potential to tap into the delivery of the NHS' long term plan's goals to build a new service model for the 21st century through connecting primary and community services via technology, tackling the historic divide between primary and community health services to deliver a more personalised, digitally enabled approach to care.

- 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?

Be a guest at one of our ECHO Networks!

We have found that the best way to fully understand how Project ECHO works in practice is to observe an ECHO session in one of our existing networks. You are welcome to join a session at a time that is convenient for you so if you would like to experience Project ECHO first hand in this way, email us at echo@hospiceuk.org and we will arrange this for you.

We hope that Project ECHO will give us a tool to explore different ways of "democratising" 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. Subject to confirmation by the Project ECHO team at Hospice UK, you will then be sent two documents:

1. 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.
2. 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.

The ECHO Institute in Albuquerque insists that these documents are signed before coming to partner launch 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. 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 programme related to ECHO. We expect hubs to use the ECHO name and the Project ECHO logo in all written, online, published and marketing materials relating to the project.

- **Logos:** You will be provided with the standard Project ECHO logo upon completion of partner launch training.

- **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.

6. Identify your ECHO team

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

- An ECHO Lead to provide planning, oversight, and direction of adapting the ECHO Model for use in the chosen health topic or initiative.
- At least one context expert or specialist to aid discussion and facilitation during your ECHO Network Sessions (can be external).
- An Administrative /Co-ordination Lead to coordinate and facilitate information flow between the ECHO hub and ECHO participants.
- IT Co-ordinator/Technician to act as the primary IT liaison to participants and provide technical and user support to your ECHO hub and participants before, during and after ECHO sessions.
- A Data Officer responsible for establishing and managing your data storing procedures.

7. Register and attend partner launch 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 ECHO Network: community provider recruitment, curriculum development, IT resources and architecture, evaluation and research tools and approaches, ECHO programme management, hub team development, etc. The training includes, importantly, actual participation and practice in running an ECHO Network session.

Partner Launch 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, (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 runs partner launch training at four centres across the UK. These centres are London, Belfast, Sheffield and Inverness. Through partner launch training, you will develop an ongoing relationship with our ECHO Team, who will assist you in setting up your own ECHO Network. We have secured central funding to support the cost of delivering the training, therefore for Hospice UK members the cost is £960 including VAT per participant. For non-Hospice UK members training costs £1,920 including VAT per participant. Highland Hospice have recently received limited funding from the Scottish Government which allows Hospices within Scotland to be trained free of charge. Each hub is 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 participants, evaluation, case presentation development, and many more. These monthly sessions are provided in addition to personalised guidance from Project ECHO at Hospice UK, as well as online video resources to help you.

Join monthly MetaECHO community calls. 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.*

Join UK Hub bi-monthly Community Support calls held collaboratively by the UK Superhub teams, which similar to an ECHO session, is a forum for discussion introduced by a short introductory presentation on a set topic chosen by UK hub teams. This provides a chance to connect with other hubs across the UK at all stages of their ECHO projects; giving them opportunity to share learning and offer mutual support.

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 ECHO Programme architecture for hub, telecommunications equipment for participants, software and IT support:

- Hub needs: Zoom and iECHO software (provided by the ECHO Institute), one or two large screen displays, a high definition camera and a good microphone.
- Participants need: Laptop/ PC/ Mac with Microphone/headset, a small video camera/ PC webcam or tablet/smartphone

For more information, please see our guide to setting up a hub. Further details will be shared at the partner launch 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 ECHO sessions and cases, such as case presentation templates, agendas.

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

9. Launch!

Hospice UK will plan to observe your first ECHO session. 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, participant sites, and any additional parties involved will provide feedback to hub verbally and in writing.

Revisit and reinforce all hub expert team ECHO activities and skills – Continually reinforce mentoring techniques, videoconferencing etiquette, appropriate Network management, and use of facilitator guide. Developing a community with a Quality Improvement mind-set 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 .

GLOSSARY OF TERMS	
Term	**Definition**
ECHO®	Extension for Community Healthcare Outcomes
ECHO Institute™	Project ECHO's headquarters, located at The University of New Mexico Health Sciences Center in Albuquerque, New Mexico. Provides training/technical assistance relating to replication efforts.
ECHO Model™	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.
Force Multiplication	Refers to an exponential increase in workforce capacity created through the ECHO model. Utilizing mentoring 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.
Hub	Sites that facilitate ECHO programs.
iECHO	Partners and training centers are required to record program data from their ECHO session in this propriety data system.
Mock ECHO	Practice ECHO networks that are designed to prepare hub team members for launching live ECHO networks.
Network Coordinator	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.
Network Manager	Project ECHO manager with network 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.
Project ECHO®	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.
Participant	Someone who joins an ECHO session and is not part of the ECHO program team.
Superhub	A partner who has been approved by Project ECHO headquarters to certify new ECHO partners as well as train and support other ECHO partners. The centers receive special training (called ECHO Superhub certification) to recruit, teach and support new ECHO partners through the implementation process.
ECHO™ Network	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.
Mentoring	The guided mentoring and learning relationship that develops during an ECHO program between all participants and subject matter experts.

GLOSSARY OF TERMS	
Term	**Definition**
UNMHSC	University of New Mexico Health Sciences Center, where Project ECHO and the ECHO Institute are based in Albuquerque, NM
User Support Analyst	Project ECHO IT employee dedicated to managing and coordinating participant technological connections to the ECHO networks.
VTC	Video teleconferencing; participation in ECHO networks via video connection
Zoom	Conferencing software used for ECHO networks