Operations guide to setting up an ECHO HUB

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Please note, all prices are guides.

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Estates - Room management

A room will need to be identified as being fit for hosting video-conferencing. An ECHO room needs:

- To comfortably sit a minimum of 6 individuals
- Space to place two large screens (at a comfortable height), a computer, a camera and microphone
- Suitable lighting/ a window that will not interfere with the camera i.e., a window that sits to the side of the room rather than the back
- Adequate power supply for the required IT equipment
- To be readily available and easily booked (ideally with priority)

Tasks	Example
Identify a room	Hospice UK London office identified a primary meeting room for ECHO sessions, and has 4 other Zoom enabled meeting rooms for backup. Hospice UK NI Office has two dedicated rooms for ECHO.
Room booking procedure	Hospice UK communicated with all staff about room priority and the central booking procedures/service was updated.
Electrics	Hospice UK London office needed to install electrics in three of the rooms, costing ~£2,800.
Equipment installation	Due to Hospice UK's insurance, installation of equipment needed to be completed by a qualified/insured individual. Costs were absorbed with the installation of the electrics.

Identify the right team to make this happen	Who will make decisions and agree/ approve plans? Who will implement? Who needs to be informed?

IT - Equipment

The requirements per hub will differ and will depend on the size of room that is being equipped. It is recommended that thought goes into Service Level Agreements and equipment repairs/replacements.

Shopping list:

Essential:

- Screens/TVs x2 - minimum of 43" – the bigger the better; (Starting at £400)
- TV Stands or Wall brackets x2; (£30)
- Professional conferencing webcam with microphone and speakers fit to room x1(£800)
- PC x1 that can drive 2 televisions (HDMI); (£800)
- HDMI cables (and potential adaptors) x 2; (£30)
- Wireless Keyboard & Mouse x1; (£20)
- Microsoft Office - usually a part of an enterprise license.
- Video editing software x1; (Starting at £50 p.a.)
- Laptop x1; for the IT Support role; (£400)
- ECHO sign/ Banner to fit room x1.

Optional:

- Camera Extension mic x1; (£200)
- Additional monitor via HDMI splitter, depending on the size of the room an additional monitor may be required for facilitator to more easily see attendants; (£100)
- Laptop x2 so that the presenter can independently view/ control their presentation and coordinator can monitor chat box and upload attendance to iECHO within session; (£800)
- USB Wireless Presenter/Clicker x1; (£20)
- Network attached storage x1; Video will be recorded and needs to be stored somewhere accessible on the network for editing. (£500)
- Sound proofing - if the room booms then you may wish to explore sound proofing options.
- Zoom license - As an ECHO hub you will gain access to a free Zoom host license. This license can only be used for ECHO related meetings; therefore, you would need to purchase a Zoom license per room for any other video conferencing meetings. £150 p.a. per logon.

Tasks	Example
Discuss requirements in relation to room	Hospice UK London office has small rooms, therefore has the essential components for holding successful ECHOs without the need for soundproofing for example.
Evaluate existing equipment	What do you currently have in place? Perhaps current equipment can be repurposed/upgraded.
Purchase equipment	
Agree SLAs for equipment failure/IT issues	If equipment fails, how are you going to repair/replace? How quickly can this take place?
Identify the right team to make this happen	Who will make decisions and agree/ approve plans? Who will implement? Who needs to be informed?

IT - Infrastructure

One of the most important elements for videoconferencing is the performance of the local area network and broadband connection. It is recommended that the wired ethernet connection for the video-conferencing PC is added to a V-Lan that is given either dedicated bandwidth, or a minimum bandwidth. It is important to note there may be other laptops also connecting to the same session, and you may choose to also protect bandwidth for these devices. It is recommended that each connected device has a minimum guaranteed 5MB/s upload and download.

Configuration of OS and other background applications is essential for PC performance. Thought needs to go into update schedules, background processes and downloads, and how anti-virus software will interact with the recommended video-conferencing solution - Zoom.

Firewall settings can be updated to prioritise Zoom traffic; there are detailed instructions on their website. There are also options for QoS (Quality of Service).

Tasks	Example
Ensure identified room has ample network points	
Review network configuration and switch performance	
Review internet speed (up and down)	
Investigate creation of a VLan with performance settings	
Ensure failover procedures are in place and communicated/understood with ECHO leads	
Assess performance and investigate QoS and firewall port configuration	
Identify the right team to make this happen	Who will make decisions and agree/ approve plans? Who will implement? Who needs to be informed?

IT - Video-conferencing support

It is difficult to ascertain how much video-conferencing support is required, as this depends on the confidence and technical competence of those that are connecting to a video-conference (and the support that they also have in their organisation).

- The first stage is to evaluate the possibility of absorbing the workload within the current support provision.

- The recommendation is that support is available when each ECHO session takes place to set up and ensure hub equipment is working and that there are no connectivity issues, start the Zoom meeting, assist with screensharing and control the hub's audio and video.

- There will be times when support will need to be given to individuals and IT teams that are connecting in to a Zoom session.
    - The Zoom website has a wide-range of support documentation, video tutorials, and advice on how to get webcam video/audio to work (which forms the majority of queries). This is a valuable place for support.

Tasks	Examples
Evaluate how much support will be required based on proposed number of networks/participants	
Decision on increasing staff/service costs	
Create documentation that can be used to pre-empt support queries	Online support guides, emails. This can be proactive or reactive.
Set up the various support channels and processes/workflows	Helpdesk, ticketing system? Hotline?
Encourage participants to test their connection and equipment prior to ECHO session	Hospice UK IT Officers host regular 'Zoom drop-in test sessions'; a Zoom meeting open for 30-60 mins throughout the week for participants to join to quickly test their internet connection, troubleshoot any issues and learn the basics of Zoom.
Identify the right team to make this happen	Who will make decisions and agree/ approve plans? Who will implement? Who needs to be informed?

IT - Business systems & data management - Contact/Network/Event/Participation management

Thought needs to go into contact management. How will the details of participants be captured and where will they be stored? To successfully run ECHO sessions, you will need to record a participant's contact details, the network they are registered to, the ECHO sessions (and training sessions) that they attend in compliance with the Data Protection Act 2018 and General Data Protection Regulation. It is recommended that each ECHO hub identifies a Data Officer i.e. an internal compliance officer/ legal representative to navigate a compliant data capture and storage method.

Alongside contact management, thought needs to go into the best methods of communicating with registered participants for meeting reminders, updates, and certification etc. It is likely that your organisation already has a business system in place to manage contacts such as a Customer Relationship Management (CRM) tool. Can this be utilised for your ECHO related contact management?

All ECHO hubs are required to submit the attendance at their ECHO sessions to the ECHO Institute based in the University of New Mexico, Albuquerque so they can accurately track the ECHO movement across the world. The ECHO Institute has developed a bespoke online application, iECHO, that manages this process. The application stores contacts via pseudonymised personal identifier i.e., a colour and a number, and the knowledge networks that they belong to. iECHO provides a simple way of scheduling ECHO sessions and recording attendance at each session; it also allows hubs to pull various reports directly from iECHO.

Tasks	Examples
How are you going to capture contact details?	Hospice UK uses a bespoke automated online registration form for recording consent for each ECHO Network. Other hubs also use Word/ PDF forms. Consider whether you require software to administer documentation that permits e-signatures.
Where are these going to be stored within your organisation?	A CRM system, a password protected spreadsheet?
What reports would you expect?	
Investigate legal issues	
How will you record compliance?	
Communication options - templates/processes	There are numerous templates located within Box.com and the Partner Launch Training Handbook.
What resources are required?	
Training	
Identify the right team to make this happen	Who will make decisions and agree/ approve plans? Who will implement? Who needs to be informed?

Online Resources

An important aspect for each ECHO network is to have a shared online space where resources such as presentations, ECHO session recordings and other relevant documents/ links can be accessed between ECHO sessions.

Tasks	Examples
Do you currently have the ability to securely publish resources to a closed network?	Hospice UK host bespoke password protected webpages on the main website for each ECHO network. Do you have the capability/ permission to add webpages to your organisation's website?
Do you need to seek an external platform to store the resources?	Moodle, Blackboard, SharePoint, Google Docs.
How will permissions be managed?	Hospice UK assigns each participant with a password to their network's resource library webpage.
Do you have the skillsets to record/edit videos and the various documents for online publishing?	
How will you store the videos from the ECHO sessions and keep these secure?	Could you upload videos privately to a Vimeo or YouTube account and publish a link to it on the network's webpage/ platform?
Identify the right team to make this happen	Who will make decisions and agree/ approve plans? Who will implement? Who needs to be informed?

Staffing - General Job/Role Descriptions

It is important to define roles and responsibilities within the project. To initiate your ECHO hub these roles could be identified within your current resources and at a later date, developed and budgeted for. It is better to start small, with small networks and with a small staff team, which can grow and evolve with experience.

Key roles to deliver ECHO include:

Role	**Key tasks**
ECHO Lead / Champion (Can be same person as Facilitator)	Provides planning, oversight, and direction of adapting the ECHO Model for use in the chosen topic or initiative. Promotes and seeks funding for network and seeks funding for programme. This role is responsible for the recruiting and training of hub and participants.
Facilitator	Establishing the network, facilitating (hosting) the ECHO meetings. Identifying potential educators/ speakers for sessions.
Administrative coordinator:	Coordinating the network meetings, liaising with network members, ensuring support and attendance monitoring during and after the meetings.

IT user/ video-conferencing support	Preparing hub equipment and software, administering the recording, editing, and publishing of ECHO sessions to online resource library, supporting the network members prior to sessions, providing live support during network sessions. (There is typically IT representation at each ECHO Network session.)
Data Officer	Ensuring compliance with data protection laws, advising on data capture and storage methods.

In addition, you are likely to need a wider team to establish the ECHO project within your organisation. In each section above, you identified the specific people required to make decisions, agree / approve plans, implement actions and who you need to keep informed. These people could form the basis of your wider project team.

Issue Log

An effective way of managing projects is to create an issue log which can capture and track issues, risks, incidents, conversations and tasks etc.

Please find attached an example Issue log.



Multi-location/ Remote Hub

Should your Hub be working across multiple locations there are some wider considerations in regards to the practical running of ECHO sessions you need to take.

You may be working in a multi-location hub if:

- Your team employ hub staff based in different buildings or parts of the country,
- Your hub comprises of more than one organisation,
- You are partnering with another hub to deliver an ECHO programme,
- All or some of your team are required to work at home due to social distancing measures.

Key considerations to make when working remotely:

- All hub team to use PC/Laptop device with Ethernet connection or stable Wi-Fi connection
- Assign and communicate clear roles to each hub member, an 'Internal team run-order/ agenda' that details who is responsible for what throughout the session can aid this
- Contingency is key; assign all hub team members as 'co-hosts' on Zoom

- Ensure two members of the hub team record the session (should one person's connection fail)
- Set up a 'group chat' for in-session communication e.g., Whatsapp group or equivalent

In addition it is advisable to conduct an assessment for each member of the hub team to check they have a suitable room, camera angle (including adequate lighting), speaker, microphone and broadband to fulfil their role.