PROMISING PRACTICES IN STATE SURVEY AGENCIES

Interactive Technology for Trainings and Meetings

Wisconsin

Summary

The Bureau of Quality Assurance, Division of Disability and Elder Services, at the Wisconsin State Department of Health and Family Services produces and presents interactive live and on-demand Webcasts for training both teleworking surveyors and supervisory staff based in the regional offices.

Introduction

This report describes the structure and functioning of Wisconsin's Webcast training program, its impact, and lessons learned that might benefit other agencies considering use of interactive Web-based programs. The information presented is based on interviews with agency management and training staff and review of documentation supporting the program.

Background

Wisconsin's Bureau of Quality Assurance began its Webcast training program in February 2005. Logistical and financial challenges of providing timely training to 164 managers and surveyors dispersed throughout five regional offices prompted the agency to search for alternatives to the traditional training model under which presenters traveled to the regional offices to provide training. Under this model, trainers dedicated approximately 25 hours of travel time to accomplish on-site training at each regional office every time a particular training session was presented. Trainers would conduct the training at the regional offices over a five-month period, one office per month, given that survey staff assembled only monthly at the offices. In addition to regional training sessions, the agency occasionally conducted statewide meetings requiring all surveyors to travel to the central office in Madison. Although perceived to be effective, the meetings were estimated to cost up to $20,000 for staff travel expenses, including lodging and meals. Occasionally, conference room rental charges were incurred that drove costs even higher. Two- to three-month lag times for disseminating important information were routine. Inevitably, some staff would miss scheduled trainings. Already challenged to offer the depth and frequency of training demanded in a modern regulatory environment, the agency's transition in March 2005 to mandatory teleworking status for newly hired surveyors provided an additional impetus for developing new training modes that also would be responsive to dispersed teleworkers and their variable schedules.

Intervention

Through an Internet connection, state survey staff can access live or on-demand Webcasts for training and information services. The agency uses interactive Web-based technology, an integrated solution for recording, distributing, archiving, and viewing rich media presentations via the Internet. In addition to relaying live lectures from training staff, media from almost any communication device, including computer, video, and DVD can be shared online, facilitating the integration of PowerPoint presentations, Automated Survey Processing Environment (ASPEN) software demonstrations, and other useful training tools.

Surveyors view Webcasts from their home offices or from a regional office with an established viewing area connected to the Web site. The viewing screen is split with video on one side of the screen and a PowerPoint presentation on the other, mirroring the style an audience experiences during in-person meetings

and trainings. The screen also identifies the topic and presenter and contains control buttons for volume and to switch from the split screen to full screen viewing. Ease of viewer interface is a hallmark of the system. The system's software allows viewers to type in and send questions directly from their computer keyboards. Forwarded questions are seen immediately by the presenter, who decides whether to respond during the Webcast or with a follow-up e-mail memorandum to surveyors. Polling software is an additional feature that enhances the interactive nature of the presentation. Viewers are queried and results are immediately available online.

The agency uses e-mail notices to alert surveyors to scheduled Webcast trainings and to provide the Internet link for the trainings. Surveyors activate the Webcast by opening the link in their Web browser.

Technical requirements for the technology utilized in Wisconsin are Windows XP Professional, Internet Explorer, and Windows Media Player. Necessary equipment for producing a Webcast includes a media recording device that captures video, audio, and visual content and a Web server that hosts the audio/video stream. Equipment costs are estimated in the range of $36,000 to $40,000 per complete system depending upon the audio and video equipment (e.g., microphones) incorporated into the base unit. An additional fee of $3,000 annually per unit provides software updates and warranty protection. The agency does not incur costs for site hosting because it has access to a state-owned Web server that meets this need. The agency initially used a conference room for producing the Webcasts, with equipment set up and take down generally requiring approximately 60-90 minutes for a single trained staff member. The agency has now established a permanently equipped Webcast production room, thereby decreasing the time needed to set up and take down equipment to approximately 30 minutes.

Presenters report that the time required to prepare Webcast training sessions is no different from preparation for face-to-face trainings. Webcast presenters decide if the training will be live or recorded and determine the format for questions and answers. Pre- and post-assessment of surveyor knowledge gained from Webcasts can be incorporated through separately purchased on-line survey software. A yearly subscription fee of $200 allows the agency to ask an unlimited number of questions in the assessment and to receive up to 1000 responses. The software includes survey analysis with graphics and report writing features. This software also is utilized for participant evaluations of the Webcasts.

Eight Webcasts have been produced since February 2005, addressing such topics as Elder Abuse, Urinary Incontinence, and Depression. Agency management determine topics for Webcast trainings based on needs analysis, CMS mandated training requirements, and input from supervisors. The agency plans to use Webcasts for meetings, in addition to the training program, beginning in September 2006.

The Wisconsin Department of Administration currently hosts and stores the Webcasts without charge, although a fee may be required in the near future.

Implementation

The agency initially implemented the Web-based training program utilizing technology purchased by the Wisconsin Division of Public Health using Federal Bioterrorism grant funds. At that time, Division of Public Health staff, who had previously received training from the vendor, provided initial training to two agency staff members. In May 2006, the agency purchased its own Web-based technology equipment and software, using a one-time investment grant from CMS. The vendor then trained several additional agency staff during a three-quarter day training session. Training was not necessary for surveyor staff that would not be involved in developing or producing Webcast sessions, as it is straight-forward to access and view the presentations by clicking on a link provided in e-mail messages from the training staff.

Impact

Agency management staff estimate savings for FY 2005 of $35,000 in direct staff training costs.

The reduction in per-training costs has allowed the agency to provide more frequent staff training. In addition to the utility of Webcasts for staff training, the agency recently has begun making Webcasts on particular topics available to health care providers, ombudsmen, and advocacy groups, ensuring that a consistent message is disseminated to surveyors and health care providers at the same point in time. The agency also is able to increase the frequency of training to health care providers, at no cost to them, by using this method of delivery. In the past, agency-provided training sessions cost participating health care providers approximately $5,000 plus travel expenses.

Surveyor evaluations of the Webcast training program have been positive, with 80% of respondents reporting that Webcast training is better than or as good as face-to-face training.

Lessons Learned

Agency staff comment that Webcast training offers a distinctly different learning environment from traditional classroom-style training and requires new expertise. Staff recommend that trainers access the growing body of distance education literature in order to fully benefit from and utilize the technology's advantages. Webcast presenters at the agency are continually refining their training approaches and learning how to best utilize the new medium. After each presentation, trainers consider ways to improve and assess options for increasing the amount of participant interaction. Presenters note the need to adjust to a lack of immediate feedback, which can be drawn from an audience's body language and expressions during a face-to-face training.

Limited bandwidth in some of the regional offices requires staff to assemble in a conference room to view the Webcasts using one personal computer with an LCD projector, as T-1 lines currently are unable to adequately service 10 separate viewers on individual computers at the office. However, the broadband connections utilized by most of the state's teleworkers provide sufficient bandwidth and facilitate a smooth connection to the Webcasts from teleworkers' home offices, where the majority of surveyors access the Webcasts.

Contact Information and Resources

For more information about the Webcast training program at the Wisconsin Bureau of Quality Assurance, please contact Sharon Rickords, Training and Quality Improvement Director, Bureau of Quality Assurance, at 608/267-3745 or by e-mail at RickoSL@dhfs.state.wi.us.

The complete listing of Training Courses developed by the Bureau of Quality Assurance as of December 2005 can be accessed by clicking on ____. The Webcasts can be viewed by copying the listed link into your browser.

This document is part of an issue brief on the use of interactive technologies for trainings and meetings in state survey agencies. The issue brief is one of a series by the Division of Health Care Policy and Research, University of Colorado Health Sciences Center, for the U.S. Centers for Medicare & Medicaid Services (CMS) highlighting promising practices in state survey agencies. The entire series is available online at CMS' Website, http://www.cms.hhs.gov/SurvCertPromPractProj. The issue briefs are intended to share information about practices used in state survey agencies and are not an endorsement of any practice.