Southeast (HHS Region 4)

MHTTC Mental Health Technology Transfer Center Network

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How to Host Virtual Office Hours: A Toolkit for Mental Health Organizations

SAMHSA

Substance Abuse and Mental Health Services Administration

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Overview

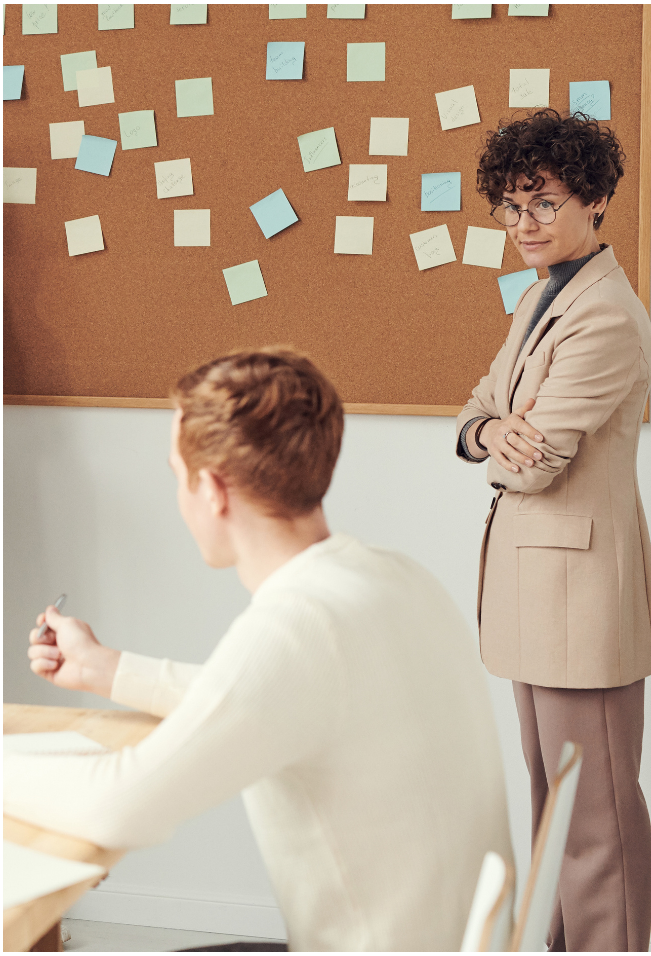
Office Hours (OH) are a series of facilitated small-group discussions on different aspects of a central topic. The purpose of this toolkit is to identify the steps involved in planning, implementing, and evaluating an OH event series. This toolkit was designed following two series of virtual OHs hosted by the Southeast Mental Health Technology Transfer Center (Southeast MHTTC) during the Covid-19 pandemic. One series focused on support for Certified Peer Specialists and the other engaged administrators in navigating changes in mental health services delivery during the pandemic. This document will support an organization's efforts to host office hours by reviewing the following:

- **Introduction to Office Hours**
- **Planning for Virtual Office Hours**
- **Implementing Virtual Office Hours**
- **Evaluating the Delivery of Virtual Office Hours**

Introduction to Office Hours

The ever-changing landscape of mental health topics presents the unique opportunity for mental health providers to talk with colleagues and other professionals, ask questions, and hear from facilitator or subject matter experts. Such conversations can exist in an Office Hour (OH) format, where facilitators lead discussions based on the questions and needs of mental health professionals. OH sessions allow attendees to share successes, challenges, and overall experiences. During this venue, facilitators can address specific questions and provide relevant information and/or resources in real time.

Reasons to Host Virtual Office Hours



- Provide new information during emergencies (i.e. COVID-19)
- Discuss current events and their impacts on varying demographics
- Further elaborate specific concepts requested by the audience
- Foster sharing of strategies and best practices
- Assist audience in working through or implementing new practices
- Improve organizational programs and resources based on feedback
- Inform future events and activities based on the needs of the audience
- Garner fresh information and perspectives from facilitators and participants

Example: Southeast MHTTC Virtual Office Hours

Office Hour (OH) sessions can be a valuable tool to provide intensive consultation services to a specific audience. Recognizing the challenges and opportunities many providers encountered in quickly transitioning to telehealth and virtual service delivery during the pandemic, the Southeast Mental Health Technology Transfer Center (MHTTC) hosted OH sessions to respond to provider questions, facilitate shared learning and resource dissemination, and foster relationships. The Center hosted two sets of OH sessions, one for Certified Peer Specialists (CPS) and one for Mental Health Care Facilities and Administrators. Common topics and themes emerged throughout the OH sessions, allowing the Southeast MHTTC to identify and plan future training events and products.

Planning for Virtual Office Hours

First Things First: Plan!

The following steps are useful in planning a virtual Office Hours (OHs) series:

1. **Establish the purpose of hosting Office Hours**
2. **Identify the intended audience**
3. **Select skilled and knowledgeable facilitators**
4. **Consider the intended audience when titling the series**
5. **Refine topics of interest**
6. **Select ideal meeting platform**
7. **Choose recurrence of sessions**

1. Establish the purpose of hosting Office Hours

- Start by identifying the purpose of the OHs series.

  - Is the series in response to shifts in the field or current events?
  - Do you want to provide consultation and support for providers implementing a particular evidence-based practice?
  - Do you want to connect providers in discussion on a specific topic?
- Gather input from individuals who are likely to be the intended audience for the OHs sessions. Consider soliciting questions from participants during other relevant events and activities to identify areas of need and interest, which can help inform the OH topics.

- Develop a needs assessment survey and ask potential participants to complete. Inquire about the types of trainings and resources that would be helpful for participants during this time. Review survey data and explore common themes and topics. Assess the need to provide intensive consultation services related to a specific topic and/or audience.

2. Consider who is the intended audience

Think about who would benefit from attendance at the OH sessions. Reflect on the demographics of participants from recent events and activities, for example, profession type, professional setting, and/or years of service. This type of information may be useful in identifying the intended audience for the OH series.

3. Select skilled and knowledgeable facilitators

- Search your network for subject matter experts to facilitate the OH sessions.

- Reach out to one or more facilitators who are knowledgeable on the topics of choice and who can provide intensive consultation services while keeping attendees engaged.

- After confirming the facilitator(s), meet with them to discuss the purpose, logistics, schedule, and topics for the OHs series. Share information about the intended audience and identified need.

The facilitators were very helpful, informative and encouraging. They helped to brainstorm some ideas I can take forward to my CMHC and community.

-Participant comment

4. Consider the intended audience when titling OH sessions

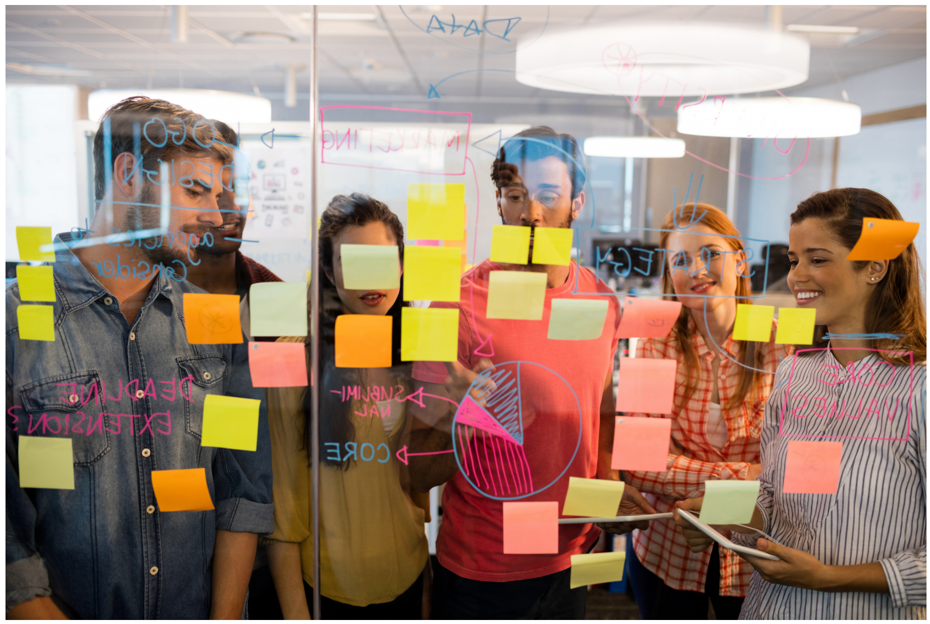
- The meeting label “Office Hour” can imply that the sessions will be solely led by facilitators to address participant questions and/or impart information on a topic. Naming the series as ‘Office Hours’ can be fitting when the facilitator is more knowledgeable than participants.

- In some meeting forums, facilitators and participants can be equally skilled and knowledgeable, or the purpose is for participants to learn from each other. In these cases, think through other titles for such meetings (i.e. collaborative forum, learning sessions, etc.)

5. Refine the Office Hour topics

- Ask the facilitator(s) for input on the broad theme for the OH series. Work with the facilitator(s) to identify topics for each OH session. The OH series theme and individual session topics can be informed by the participant needs assessment.

- To further refine potential OH topics, ask individuals from the intended audience to rank topics from most relevant/important to least relevant/important.



- Review the ranking data with the OH facilitator(s) to finalize the overall theme and specific topics.
    - For example, if planning an OH series specific to Certified Peer Specialists (CPS), the intended audience would include CPSs and topic areas would be relevant for this group.

Most useful was hearing other people from different states express their dealing with COVID-19 in the workforce.

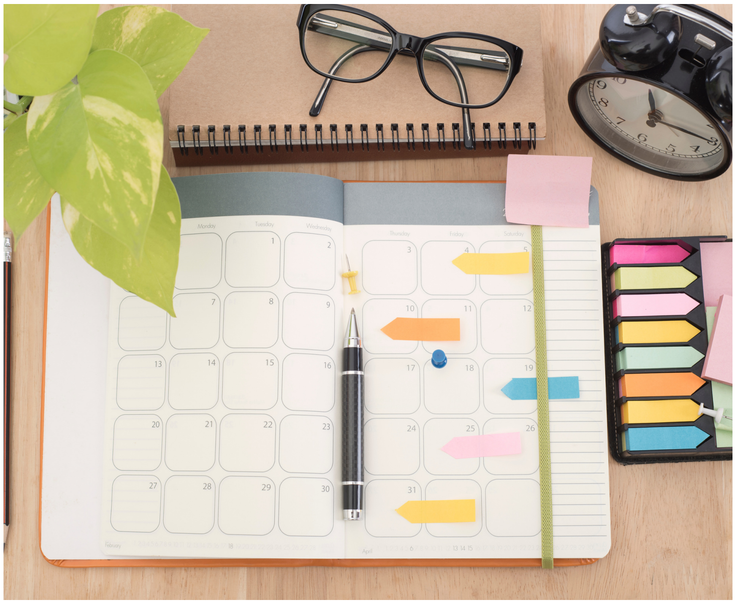
Participant comment

6. Select an ideal meeting platform

> ***Zoom meeting was user-friendly; opportunity for people to speak, share, write.***
>
> -Facilitator comment

Virtual meetings are slightly different than those held in-person. Both formats have pros and cons. With this in mind, consider identifying a versatile meeting platform for virtual OH sessions that would allow for facilitator(s) and attendees to engage with one another in a variety of ways. The following are important features to include when selecting a virtual OH platform: video and audio capabilities, file attachment, and chat feature. A multi-featured platform enhances learning, information sharing, and engagement among participants.

7. Choose recurrence of sessions



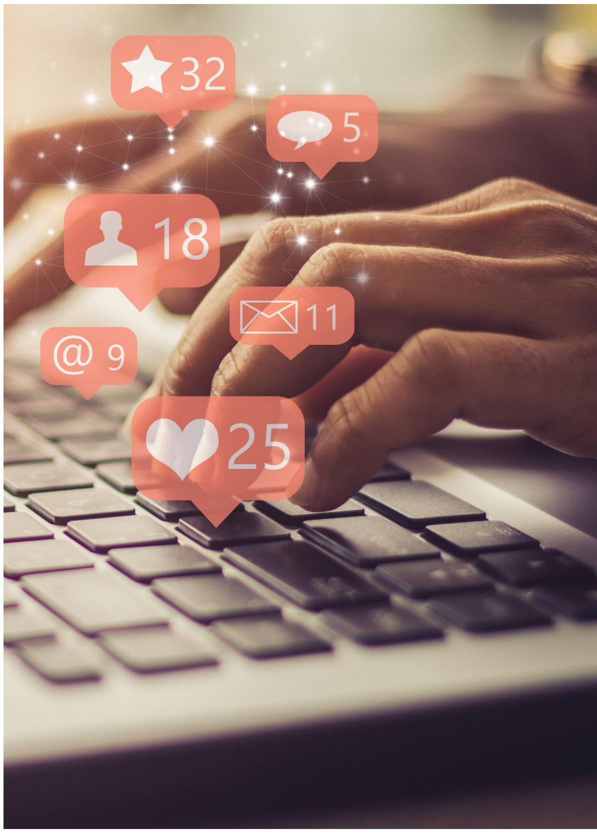
- Important factors to consider include the number and timing of sessions:
    - How often are the facilitators able to lead OH?
    - How often would the target audience be able to attend?
    - Are there other events or activities hosted at similar times that would interfere with attendance?
- Identify an ideal recurring day of the week and time for the OH sessions. Meeting every two weeks or once a month is recommended.

Next Thing: Deliver!

This section outlines the implementation process and includes:

1. **Apply a marketing strategy**
2. **Organize the discussion segments**
3. **Design session flow**

1. Apply a marketing strategy



- Identify ways to distinguish OHs from other events, meetings, and trainings. Think of various communication channels to promote the series to the intended audience.
- Send written communications to share information about the upcoming OHs. Develop and send promotional emails to your listserv, inviting participants to register for OH sessions. Consider sharing the registration link of the OH session on social media platforms.
- Promote the OH series on your website by identifying a prominent location to highlight the upcoming series. Provide opportunity for participants to register for upcoming OH sessions by sharing the registration link.
- Verbally invite participants to register for upcoming OH during other meetings, trainings, or activities. Describe the topic, purpose, and intended audience of each session.

2. Organize the discussion segments

Engaging participants during OH sessions is an essential but difficult task. In order to enhance engagement, determine subtopics or discussion segments ahead of time. Most discussion segments can be informed by questions submitted by participants. There are two ways to solicit questions and/or topic areas from participants.

Pre-submitted questions

Use the OH registration page as an avenue to receive questions from participants. Include space on the registration page for participants to pre-submit questions related to the OH session. This allows facilitators to prepare discussion segments in advance.

Live inquiries

In addition to soliciting questions through the registration pages, facilitators can invite participants to ask questions during the live OH session. Ask participants to either unmute their microphones or encourage participants to type their questions in the chat box.

Registration page fields can include:

Name:

Email:

State/Province:

Organization:

Job Title:

Please enter the question you would like to ask the OH expert:

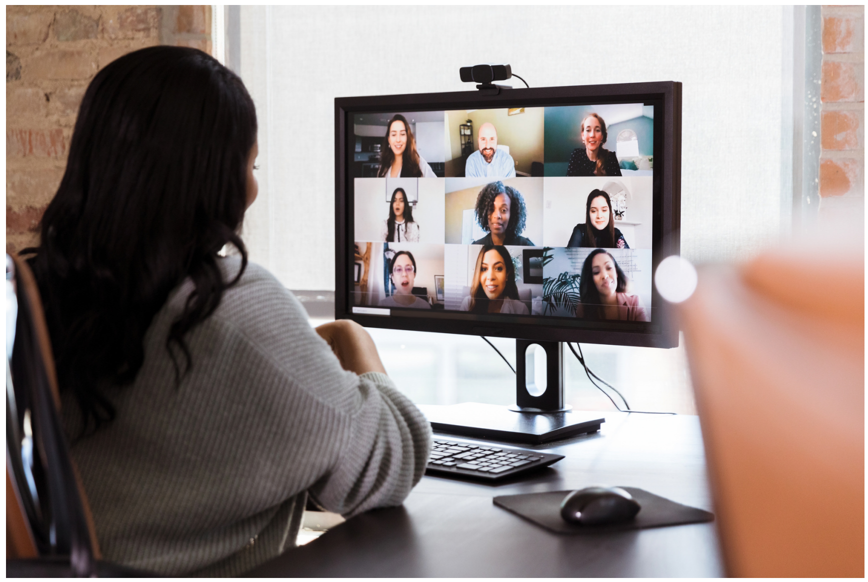
If you have an additional question for the expert, please enter it here:

If you have an additional question for the expert, please enter it here:

3. Design the flow of each session

Design the OH format to welcome engagement between participants and facilitators. Be sure to organize the sessions to include an introduction, conversational discussion segments, and a closing.

A. Introduction



- Start each session with facilitators introducing themselves. Be sure to have facilitators turn on their video cameras and unmute themselves when speaking. This encourages the participants to do the same.

- Facilitators should encourage participants to turn on their video cameras and unmute their audio to introduce themselves. For participants who are less willing or lack video/audio capabilities, facilitators can encourage participants to "introduce" themselves by typing in the chatbox.
    - Consider the following as introduction questions: name, state , profession, and reason for attending. Facilitators may choose to to include a lighter question, or ice breaker, as a means to get to know the audience.

- Facilitators can close the introduction segment by reviewing the overarching theme for the series, the topic of this session, and the session flow.

B. Discussion Segment

- Before launching into the discussion segment, facilitators can describe the format of the OH session and guidelines for discussion, which may include:
    1. Be respectful of others
    2. One person speaks at a time so that everyone can hear
    3. Remain on mute when not speaking

- Next, the facilitator(s) may read a pre-submitted question or a question submitted in the chatbox. The facilitator(s) may choose to answer the question and/or ask for responses and comments from the audience.

- The facilitator(s) can also welcome participants to respond to each other. Participants can share their knowledge, resources, or challenges related to the topic.

- The facilitator(s) should consider utilizing additional meeting platform features when applicable, i.e., screen share. Participants may find it helpful to view a particular resource or website in real time as the facilitator(s) references it during the discussion. Additionally, if the meeting platform permits, the facilitator(s) and participants could be encouraged to attach relevant documents or share via the chat.

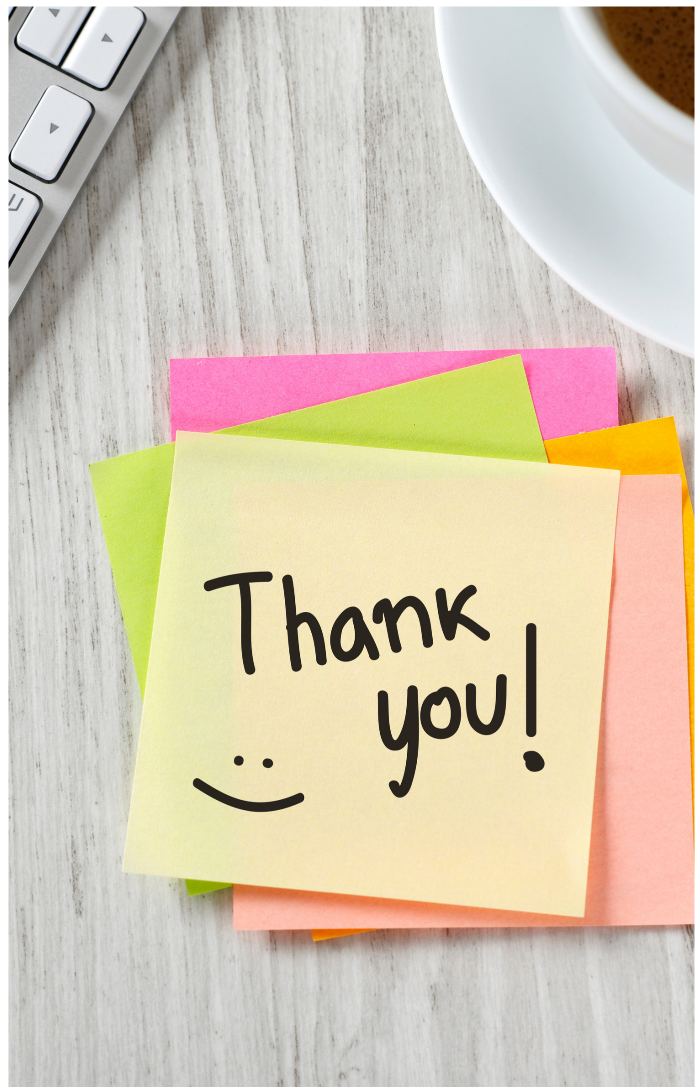
- When possible, the facilitator(s) should continue to encourage participation by turning on the video camera when speaking or by typing in the chatbox.

- These strategies allow for continued participant engagement and additional discussion prompts.

C. Closing

- First and foremost, thank participants for their attendance and participation. If additional OH sessions will be held, share the registration link with the participants and encourage future attendance.

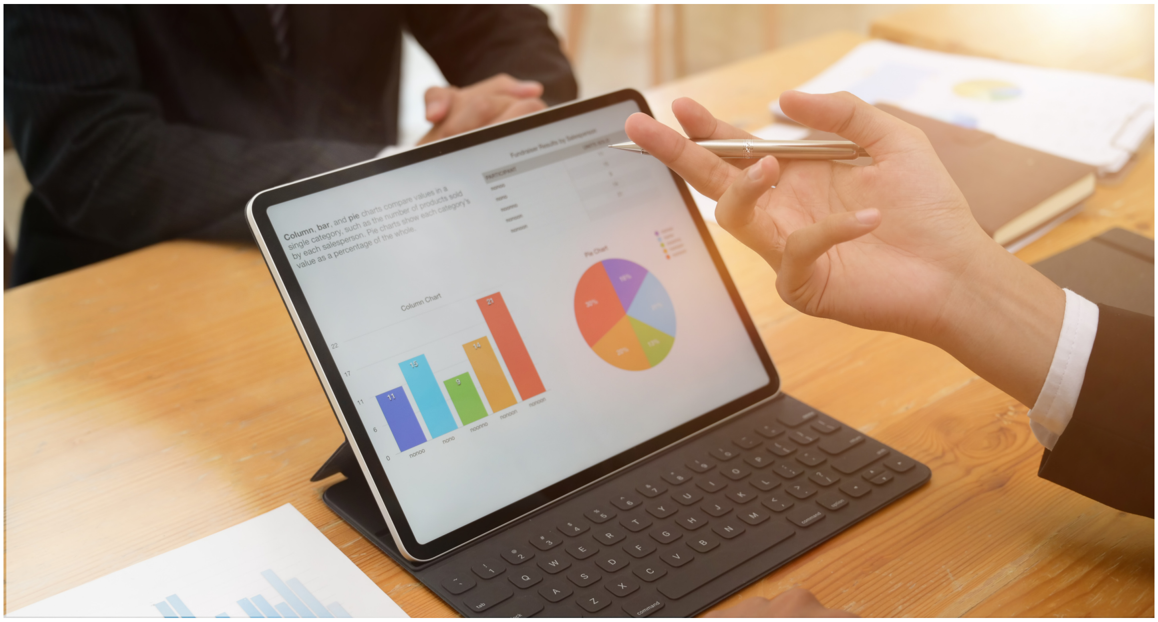
- Inform participants that they will be invited to complete a post-event evaluation survey either through a link shared in the chat or via email. Welcome their feedback to understand what they liked about the session and ways to improve the OH experience.



Finally: How Did it Go?

This segment of the toolkit addresses data collection and evaluation of the OH session delivery, including data points from:

1. **Staff observation**
2. **Feedback from facilitators**
3. **Feedback from participants**



1. Staff observation

It can be helpful for a team member to attend each session for observation and note-taking. Notes can be typed on a pre-developed template to gather information on the structure of sessions, duration of each session, questions and topics discussed, and the interactions between facilitators and attendees. These notes could be useful in determining what changes to subsequent OH sessions are needed. The next page provides an observation guide template for note-taking.

Template 1: Office Hour Staff Observation Guide

Facilitators: ____
Name of Office Hour: ____
Date of Office Hour: ____
Duration of Office Hour: _____________________________________
Number of Participants: ______________________________________

Topics

Note to observer: To create another topic table, copy/paste the table below.

Name of discussion segment:

Topic source:

- [ ]Pulled from submitted questions
- [ ]Question submitted in chat
- [ ]Facilitator raised the topic
- [ ]Participant asked question

Duration of discussion:

Interaction between facilitator and participants:

- [ ]Facilitator talking
- [ ]Interaction between facilitator and participants
- [ ]Interaction between participants

Notes (topics discussed, interactions, materials shared, etc.)

Training Delivery

<u>Organization</u>	**Yes**	**Somewhat**	**No**	**N/A**	**Comments**
Clear statement of purpose.					
Smooth transitions between topics and/or activities.					
Duration of office hour session was sufficient.					
<u>Implementation</u>					
Office Hour format set up supported learning.					
Provided opportunities for participants to actively participate.					

Additional Observations

After the training, record additional observations or reflections (e.g., strengths, areas for improvement).

2. Feedback from facilitators

- Feedback from facilitators can be collected in two ways: 1) a debrief meeting with the facilitators after OH sessions or 2) facilitator completion of a written evaluation form.

- Feedback from facilitators can inform the planning and implementation of sessions, help troubleshoot any challenges, and generate ideas for future sessions.

- Facilitators can be valuable resources for providing information on what worked well and suggestions for improvement. Be sure to thank them for their feedback.

- It is recommended to solicit feedback from facilitators after the first session to allow for any adjustments to be applied during subsequent OH sessions.

Session when there was discussion about racism was the best one and most interactive.
-Facilitator's comment

The following page provides an example of the facilitator OH evaluation form.

Template 2: Office Hour Facilitator Evaluation

Thank you for facilitating the Office Hour session. As part of our ongoing quality improvement efforts we appreciate your honest feedback on the session.

Office Hour Facilitator Evaluation

Name of Facilitator: ____

Name of Event: ____

Date of Training/Event: ____

Number of Participants: ____

Please circle your level of agreement with the following statements:

	Strongly Disagree	Disagree	Neither agree nor disagree	Agree	Strongly Agree
The session was delivered as planned.	**1**	**2**	**3**	**4**	**5**
The duration of the session was sufficient.	**1**	**2**	**3**	**4**	**5**
Participants were engaged throughout the event or training.	**1**	**2**	**3**	**4**	**5**
The participants represented the target population for the session well.	**1**	**2**	**3**	**4**	**5**
The structure of the webinar room was conducive to the session.	**1**	**2**	**3**	**4**	**5**
Overall, I am satisfied with the delivery of the event or training.	**1**	**2**	**3**	**4**	**5**

Please answer the following questions:

1. What were 3 highlights from the session?

2.What, if anything, did not go as planned?

3.How did you address things that did not go as planned?

4.What, if anything, would you do differently next time?

3. Feedback from participants

Participants can provide valuable feedback about OH sessions and can be informative immediately after a session or after a longer follow up time frame.

A. Post-event feedback from participants:

Ask participants to complete a survey upon completion of an OH session. Relevant data collection could include participant demographics, overall satisfaction with the session, impact on professional development and/or current practice, and additional suggestions for improvement of the OH sessions. The following page provides an example of a post-event participant feedback form.

B. Six month follow-up feedback from participants:

To gain additional information on how participants implemented what they learned from the OH sessions, a follow-up survey can be sent to participants several months later. The survey could include similar questions to those posed during the post-event feedback form or questions about longer-term impact on application of skills and knowledge in their current work practice.

Template 3: Post-Event Participant Evaluation

Thank you for attending [Event Name] on [Date]

We value your input on this Office Hour. Please complete the questions below.

Please indicate your level of agreement with each of the statements below.

	Strongly Disagree	Disagree	Neither agree nor disagree	Agree	Strongly Agree
1. The Office Hour enhanced my knowledge in this topic area.	**1**	**2**	**3**	**4**	**5**
2. The Office Hour enhanced my skills in this topic area.	**1**	**2**	**3**	**4**	**5**
3. The Office Hour was relevant to my career.	**1**	**2**	**3**	**4**	**5**
4. The Office Hour was well organized.	**1**	**2**	**3**	**4**	**5**
5. The Office Hour was knowledgeable about the subject matter.	**1**	**2**	**3**	**4**	**5**
6. The Office Hour was well prepared for the course.	**1**	**2**	**3**	**4**	**5**
7. The Office Hour was receptive to participant comments and questions.	**1**	**2**	**3**	**4**	**5**

8. How did you hear about this training?
   a. Organizational listserv
   b. Organizational website
   c. State Mental Health Department
   d. Supervisor
   e. Colleague
   f. Social media
   g. Other (please specify)_________________

Please provide comments about the event.

9. What about the office hours was most useful in supporting your work responsibilities?

10. How can our organization improve its office hour sessions?

11. What are two ways that you can use the information from this office hour session in your job?