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# PROMISING PRACTICES IN STATE SURVEY AGENCIES

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## *Issue Brief: Interactive Technology for Trainings and Meetings*

### **Introduction**

The use of interactive technology to conduct meetings and trainings across multiple locations commands a growing presence in industry and education as organizations seek to improve communication and collaboration among dispersed workers. In today's economic climate, organizations are compelled to establish systems to improve communications and teamwork with reduced budgets and constrained resources (1). Business meetings and in-person employee training programs, long the hallmark of traditional business communication, are costly and time-intensive, fueling the search for technology-driven alternatives. Expensive business travel for meetings and staff development is often the first casualty of budget cuts. The emergence of the Internet and the maturation of other technologies, such as videoconferencing, have expanded the availability and affordability of technology and present a viable alternative to usual practices. Web conference users were projected to increase to 107 million worldwide users in 2005, up from 51 million users in 2002 (2). Distance education by the Internet, CD-ROM, or video enjoys widespread acceptance by training managers and is supported by a large body of literature showing strong results for learning and cost savings (3,4). Interactive technology also is a key support for businesses that use teleworking as a method to recruit and retain talented staff.

Survey agencies, given their intense demands for ongoing staff training and the dispersion of the surveyor workforce, offer an ideal environment for the application of technical approaches to employee training and meetings. This report describes the use of interactive technology for meetings and trainings at the state survey agencies in New York, Virginia, and Wisconsin. The information presented is based on interviews

### **Glossary**

***Interactive Technology:*** Systems that allow users in different physical locations to interact.

***Webcast:*** Use of the Web to deliver live or delayed versions of sound or video broadcasts (5).

***Web Conferencing:*** The on-line complement to the common conference call. Participants log in to a restricted Web site, where they can view slide presentations, send text messages to others in the meeting, and work together on documents and spreadsheets. Some services also offer on-line white boards, where the presenter can draw diagrams as well as the ability to conduct surveys of conference participants and tally the results (6).

***Videoconferencing:*** Communication across long distances with video and audio contact that may also include graphics and data exchange (7).

***Rich Media:*** The intersection of audio-, data-, and video-related technologies and services (8).

***Streaming Media:*** Technology that allows real time or on-demand delivery of audio, video, and multimedia. Digital media (video, voice, data) is received in a simultaneous, continuous stream (7).

with agency staff and review of documentation supporting the interactive technology programs.

### **Summary of State Examples**

The key features of the three interactive technology programs, their impact, and lessons learned from the agencies' experience are summarized in this section. Detailed information for each state's program is presented in state-specific descriptions.

### ***Key Features***

The programs utilized in the three featured states differ in their duration, type of technology, and scope; for all three agencies, the technology-based efforts are a component of the agencies'

larger training programs, which also include face-to-face orientation and training sessions. New York's videoconferencing efforts have been underway for two years, while the programs in Wisconsin and Virginia have been in place for about one year. Significant differences in the technology utilized in the three agencies reflect variations in investment, both in terms of required equipment purchases and necessary information technology (IT) support. The Virginia and Wisconsin programs utilize state-of-the-art technology and are Internet based, while in New York, the agency has been able to meet educational objectives with a less expensive technology requiring only telephone connections. Videoconferencing is viable for New York because all of their surveyors travel to a regional office on a regular basis. Because surveyors in Wisconsin and Virginia telework, Webcasts that deliver training directly to a home or multiple health department offices better serve the needs of these agencies. All three of the agencies leveraged their existing IT infrastructure, accessed grant funds for equipment, and offer programs for live and on-demand viewing. In addition to utilizing interactive technology programs for training purposes, Virginia and New York currently use the technology for meetings, and Wisconsin plans to initiate this use in the fall of 2006. In Virginia and Wisconsin, agency staff develop and present training sessions, while the New York agency contracts with the State University of New York to coordinate their program and work with the survey agency to develop training topics and recruit outside consultants as speakers.

The need to provide frequent, timely, and cost-effective training for geographically dispersed surveyors drove the decisions of the three agencies to invest in interactive technology approaches. With extensive telework programs in Virginia and Wisconsin and surveyors based in multiple regional offices in New York, all three agencies sought to reduce the time and costs associated with staff traveling to central physical locations for training programs. Wisconsin surveyors access the interactive Web-based training sessions directly from their home offices, while Virginia's surveyors travel to the

closest health department office for viewing the training programs. New York surveyors participate in training videoconferences from the regional office in which they are based.

### ***Impact***

Staff at all three agencies report significant cost savings due to the use of technology-based training approaches. Agency staff indicate that once the initial equipment investments are made, cost per training session can be relatively modest, particularly when compared to resources expended under the past training model to support surveyor travel and the indirect cost of lost productivity due to travel time. As a result of the reduction in costs per training session, the agencies have been able to increase the overall number of training sessions provided and strengthen the consistency of information received by surveyors across all regions of the state. In all three agencies, surveyors have provided positive feedback regarding training sessions and meetings conducted via interactive technology. Although the loss of face-to-face interaction has required adjustment for some surveyors and presenters, this issue appears to be outweighed by the advantages of convenience, reduced travel, greater frequency of training, and cost savings.

### ***Lessons Learned***

Agency staff report that presenters may require an adjustment period to master teaching utilizing the new technology, especially as they adapt to and learn to capitalize on the strengths and attributes of unfamiliar media. The absence of a live audience for trainers is a notable change and adjustment. A certain amount of trial and error is reported as trainers become accustomed to the technology and gain confidence to explore the range of options it offers, especially features such as on-line polling and question-and-answer sessions that expand the amount of interaction between presenters and viewers. Although staff at all three agencies encountered technical challenges as they adapted to the new technology, they were able to quickly resolve problems and develop technical competency within their existing IT capabilities.

## **Conclusion**

Agency staff are enthusiastic about the integration of interactive technology for conducting meetings and trainings, as a method to meet the challenge of providing timely, consistent, and frequent training with limited resources. The agencies selected technology that has yielded financial savings and allowed improvement and expansion of their prior

training capacity. The range of available technical options permits each agency to select technology based on their unique agency features, needs, and resources. Staff from the three agencies agree that the investment in interactive technology programs has resulted in immediate and projected long-term benefits in terms of cost savings and improving or maintaining staff development and education.

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## *Interactive Technology for Trainings and Meetings*

### New York

#### **Summary**

The New York State Department of Health's Surveillance Training Academy (STA) provides clinical update training for nursing home, hospital, intermediate care facilities/mental retardation (ICFs/MR), and home health/hospice surveyors via videoconferences. The STA is an intensive residential training institute for new and experienced surveyors. The content and recommendations for presenters for the videoconferences are determined by surveyor feedback and suggestions of the STA guidance committee.

#### **Introduction**

This report describes the structure and functioning of New York's videoconferencing program, its impact, and lessons learned that might benefit other agencies considering use of interactive technology for trainings and meetings. The information presented is based on interviews with agency management staff and review of documentation supporting the program.

#### **Background**

The Surveillance Training Academy was established in January 2001 in response to a substantial increase in surveyor hires after a waiver of exemption from the statewide hiring freeze was approved. The Academy, organized and coordinated by The School of Public Health at the State University of New York, under a Memorandum of Understanding with the Department of Health, was designed to provide a consistent training approach for newly hired long-term care surveyors. The training was soon expanded to include home health and hospital surveyors and additional state health department personnel. The Surveillance Training Academy is held in Albany and provides four-day orientation sessions for new surveyors and a three-day annual update session for all surveyors. In December 2004, the Academy began to provide additional training on clinical topics to surveyors based out of New York's four regional offices (in seven locations) via videoconference, in response to surveyor requests to receive clinical updates without the burden of traveling.

Agency management believed that providing additional training would benefit staff morale and improve the clinical consistency and knowledge of surveyors across the regions. New York's large geographic size and challenging winter weather provided additional impetus for the use of videoconferencing as a lower cost and convenient training alternative.

#### **Intervention**

Through a public telephone connection, surveyors access live videoconferences for clinical training. Videoconferences feature a speaker, often an expert brought in to speak on a particular topic, and may incorporate a PowerPoint presentation. Opportunities for questions and clarifications are part of the videoconference.

Bridging technology is employed to connect the sites to the presenter and to each other. Videoconferencing equipment remains set up at each of the regional office locations and in the Central Office's Delmar location and is maintained by technical staff who also handle the technical aspects of connecting participants to the videoconferences. The Health Department had been involved with videoconferencing for over a decade; the survey agency recently used grant funding to upgrade equipment and improve technical compatibility across the regional offices. In addition to live viewing, videoconferences also are archived and available for on-demand viewing in libraries maintained at each regional office.

Videoconferencing topics are selected with input from both managers and surveyors. The School of Public Health recruits and hires external expert speakers as consultants and provides administrative support to the program, including tracking attendance. The clinical videoconferences produced to date have addressed a range of topics, including Ventilator Update, Epidemiological Investigations Process, Pharmaceutical Update, and End-Stage Renal Dialysis Update. A program on Communicating with Individuals with Behavioral Issues is currently in production. Because the equipment is available through the Health Department, the only cost incurred by the survey agency is the cost of honoraria provided to expert presenters.

### **Implementation**

The agency utilized the videoconferencing equipment owned by the Health Department to produce the first videoconference in 2004. Agency management announced to surveyors that the agency had developed a videoconference program in response to surveyor requests for additional clinical training and indicated that surveyors were required to view the videoconferences, whether participating in the live conference or viewing the archived videotape.

### **Impact**

Surveyor evaluations of the videoconferences are highly favorable, with the majority of surveyors reporting that the videoconferences are a worthwhile experience and improve their effectiveness as surveyors. Given restrictive training resources, agency management believe that the training offered via videoconference would simply not be available to surveyors if the training required regional staff to travel to a central location or expert presenters to travel to various locations around the state. In addition to increasing access to clinical training, the videoconferencing program improves the

consistency of information across individual surveyors and across regions.

### **Lessons Learned**

Because the videoconferencing program requires no travel time, it is a cost-effective and convenient modality for providing clinical training updates to surveyors and may be particularly useful for large states and states with long periods of inclement weather. The agency's current technology does not allow for simultaneous viewing of the presenter and PowerPoint slides, which is a source of frustration for some viewers. However, because the agency has confined its videoconference program to speakers using a PowerPoint presentation followed by a question-and-answer session, equipment costs are kept low while the program still meets the objective of providing surveyors throughout the state with clinical training updates without incurring travel costs. Agency management staff recommend analyzing the benefits and costs of videoconferencing vs. classroom training and considering the level of technology appropriate for desired purposes. For example, current technology options that incorporate various rich media sources, while requiring greater financial investment, can enhance production and may help to diminish staff perceptions that video or Web conferences are an inferior training option when compared to face-to-face training. It was noted that traditional classroom style training might remain a preferred modality for some surveyors accustomed to that training environment.

### **Contact Information**

For more information about the videoconferencing program at New York State's Surveillance Training Academy, please contact Joan Pivorun-Wehrle at 518-402-5340 or [jpp01@health.state.ny.us](mailto:jpp01@health.state.ny.us).

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### Virginia

#### **Summary**

The Center for Quality Health Care Services at the Virginia Department of Health uses interactive videoconferencing technology for conducting trainings and staff meetings. District Health Department offices with convenient locations throughout the state provide accessible viewing locations for home-based surveyors.

#### **Introduction**

This report describes the structure and functioning of Virginia's interactive videoconferencing program, its impact, and lessons learned that might benefit other agencies considering the use of interactive technology for training or meetings. The information presented is based on interviews with agency management staff and review of documentation supporting the program.

#### **Background**

Virginia's 41 long-term care surveyors are home-based and telework. The agency has one central office, located in Richmond. Providing training and information to this dispersed workforce posed logistical and budgetary challenges, with some surveyors living six to eight hours from the central office. Statewide trainings and meetings were expensive in terms of both time and travel. Surveyors also were dissatisfied with the need for long drives to the central office location. Due to a lack of sufficient meeting space to accommodate all surveyors, the agency had to incur the additional expense of renting off-site locations for large meetings. The need to efficiently and cost-effectively reach surveyors across the state compelled the agency to explore technology options for conducting training and meetings.

#### **Intervention**

Through an Intranet connection, state survey staff participate in live videoconferences for training

purposes and quarterly staff meetings. The videoconferences may incorporate data and information from slides such as PowerPoint presentations or demonstrations using Automated Survey Processing Environment (ASPEN) software. Bridging technology allows participants at all connected sites to see and hear one another in real time. Speakers are featured in the center of a viewing screen and participants at the other sites are featured along the perimeter of the monitor. On the monitors of the remote participants, the view shifts to focus on the individual speaking, with the speaker always shown in the center of the screen. The presenter's screen remains constant with the presenter in the center of the screen and the remote sites identified along the screen perimeter.

Thirty-eight local Health Department district offices located throughout the state serve as videoconferencing sites. The teleworking surveyors travel to the site closest to their home base to participate in the videoconferences. Travel times to the district offices vary, with the longest travel times approximately 1½ hours, compared to up to eight hours of travel to the central office. Videoconferences can be saved on videotape or to multimedia (Windows Media Audio format) computer files for on-demand viewing.

Required equipment for the district offices is housed on a media cart that can be transported from room to room. The equipment includes single or dual 32-inch liquid crystal display

(LCD) and a video camera. Some district offices have a dedicated videoconferencing room where equipment remains set up. Health Department IT staff provide technical support to the district offices, although agency staff indicate that the technical requirements for linking the district offices to the videoconference are not complex, particularly after the initial set up of equipment.

The agency utilizes the videoconferencing system's connections, wide-area network, and equipment in place at the Health Department. The Health Department conferencing manager coordinates access to the statewide system and links the remote sites on the day of scheduled videoconferences. The state agency coordinates with each local Health Department office to ensure room and equipment availability. The agency paid \$5,000 for equipment that builds upon the existing technology previously purchased by the Health Department. Recently, all equipment was transferred to the new Virginia Information Technology Agency.

The survey agency utilizes interactive videoconferencing for multiple purposes. For example, home health surveyors conduct quarterly staff meetings and quality assurance activities via videoconference. In addition, the technology has been used for training long-term care surveyors on Life Safety Code deficiencies, multiple ASPEN and Minimum Data Set (MDS) issues, and new employee orientations, with plans to conduct Principles of Documentation training via videoconference in the near future. Videoconferencing also is utilized for focused refresher training for individual surveyors and parts of new employee orientation. New staff who live a significant distance from the central office and begin their employment mid-week will travel to the closest Health Department district office and begin their training via videoconference, before receiving the full three- to four-week orientation at the central office.

Conducting trainings and meetings via Web-based videoconferencing has presented new challenges to trainers accustomed to face-to-face teaching. Agency management encourages trainers to experiment with new teaching and presentation techniques to maximize the utility of

this communication format. Equipment is easy to use and is activated simply by turning on the monitor.

### **Implementation**

The agency has been utilizing videoconference trainings and meetings for one year. The Health Department had an existing videoconferencing network with bridging technology that allowed the connection of multiple remote sites. When the state survey agency decided to implement videoconferencing, the agency was able to utilize the capabilities of the existing system and needed only to purchase additional hardware that tapped into the existing network. The system is easy to use and district Health Department staff provide basic instruction to surveyors about the equipment's operation.

### **Impact**

Agency staff estimate quarterly cost savings of \$7,000 to \$8,000 due to videoconferencing, for an annual savings of \$28,000 to \$32,000. In addition to cost savings, staff also note that videoconferencing allows the agency to conduct more frequent and timely trainings. Videoconferencing also is credited with facilitating more timely responses to individual surveyor problems or issues, which were previously addressed during quarterly staff meetings.

### **Lessons Learned**

Agency staff advise that successfully implementing an interactive technology program requires strong and committed IT support. Staff also note that it is valuable to encourage trainers to experiment with the technology and that trainers should have support for their attempts to assimilate innovative approaches to training and education. Although presenters initially may encounter technical challenges using the videoconferencing equipment, most presenters quickly adapted to the new approach and were interested in learning how to use a new communication medium. It is important to provide sufficient instruction to presenters and

surveyors to ensure the agency takes full advantage of the videoconferencing technology.

**Contact Information**

For more information about the use of interactive videoconferencing at the Virginia Center for

Quality Health Care Services, contact Linda Wilhelm, Training Director, Center for Quality Health Care Services, Department of Health at 804-367-2141 or [Linda.Wilhelm@vdh.virginia.gov](mailto:Linda.Wilhelm@vdh.virginia.gov).

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### Wisconsin

#### **Summary**

The Bureau of Quality Assurance, Division of Disability and Elder Services, at the Wisconsin 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 Website. 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 survey 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 survey agency staff members. In May 2005, the Bureau of Quality Assurance 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 straightforward 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 percent 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 a liquid crystal display (LCD) projector, as T1 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](mailto:RickoSL@dhfs.state.wi.us).

Wisconsin's Webcast site and the complete listing of Training Courses developed by the Bureau of Quality Assurance as of December 2005 is available on line by clicking on the Promising Practices State Supplemental Resources link. The Webcasts can be viewed by copying the listed links into your browser.

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