



# Practical guide for virtual service delivery

Due to the health risks posed by the COVID-19 pandemic, organizations throughout Calgary have had to radically alter the ways in which they provide services to clients. When the pandemic hit Calgary in early 2020, organizations had to react quickly to ensure safe working environments for staff as well as clients. Due to the rapid onset of the pandemic, many organizations had to react quickly to set up virtual spaces to continue delivering services.

As the pandemic continues, it is even more important to review best practices and recommendations around remote or virtual service delivery to ensure organizations are providing the best service possible during this challenging time. Keeping up to date with best practices allows us to learn and remain adaptable and able to respond to the changing situation around COVID-19.

This document reviews some of the best practices for providing remote or virtual service delivery. **Due to the diverse array of services provided by non-profit organizations, this is not an exhaustive list or account of all best practices for all service types.** Readers are encouraged to use this document as a starting point to review the best practices and resources *most relevant* to their organization.

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# Organizational concerns

Organizational concerns address the overall health and functioning of an organization, ensuring it is able to continue providing services during a crisis. There are two key components to ensuring continued service provision: Business continuity focuses on logistics and plans that allow an organization to continue providing services, like personnel training, access to necessary equipment, and legal and accounting considerations. The second component, industry-specific concerns, focus on how specific types of services, like social work supports, therapy, substance-use treatment, can be effectively provided during a crisis.

## Business continuity

Ensuring that your organization has a business continuity plan that is effective is vitally important to continued service delivery. The **Canadian Centre for Occupational Health and Safety** has developed a planning page for organizations who need to develop or rework their business continuity plan as a result of COVID-19. Many organizations will already have a business continuity plan and may even have a coordinator who maintains it. Many organizations also have disaster response plans or other formal plans in place to ensure business continuity during a disaster situation. However, the nature of the COVID-19 pandemic represents a novel challenge to established business continuity. As a long lasting, potentially multi-year interruption to normal workflows and service delivery, ensuring that organizations are following best practices for maintaining business continuity *during a unique emergency such as COVID-19*, becomes even more important.

When planning for a disaster situation, it is important to understand the difference between the planning stage and the execution or implementation stage. In the planning stage, organizations coordinate the specifics pertaining to their organization and what needs to be maintained to ensure service delivery during an event. This pre-work will help ensure that plans work smoothly during the execution phase. The execution phase is when those plans are activated due to an emergency or event, and this is the area where many organizations reported issues during COVID-19.

During COVID-19 the implementation or execution phase did not always go as smoothly as organizations hoped, and many realized they needed more development during the planning stage. The Canadian Centre for Occupational Health and Safety recommends organizations undergo a period of testing and revision during planning, where mock disasters or activations are simulated, and the business continuity plan is activated. This allows organizations to see how their plans work in real time and can highlight issues or points of friction within the plan.

The best practices listed below are provided by The Canadian Centre for Occupational Health and Safety and are part of their overall recommendations for refining organizational business continuity during this unique emergency.

## Best practices

Review critical elements of business: It's recommended for organizations to review what is most critical to their functional service provision and what may happen if providing that service is interrupted by COVID-19.

- Identify what processes, operations, and functions are CRITICAL to your organization.
- Identify what are CRITICAL internal and external dependencies - people, things, or other businesses that your organization relies on to function.
- Identify what else could affect your business (staff shortages, inability to accommodate service provision, revenue streams, etc.).

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Develop plans around organizational priority areas such as:

- Personnel – Training back up staff, splitting staff into separate teams in case one team gets ill, building redundancy within the organization so that if certain staff are unable to work then the organization isn't left unable to provide service.
- Equipment – If your organization uses specific tools or equipment (computers, other technology, communication software, physical assets etc.) make sure staff have access the tools they need to get their jobs done effectively.
- Availability of assets – Make sure that organizations have, and can maintain access to the assets they need to provide service (buildings, technology, IT support, utilities, remote access for staff working from home, etc.).
- Business commitments – Review the legal implications of reduced levels of service, funding agreements (e.g. for non-performance or late delivery of service).
- Accounting – ensure that your organization can continue payroll, finances, building payments, etc.

Review and enforce Health Canada and local health practices during COVID-19. As this is an infectious disease it is important for organizations to educate staff around disease prevention. Please review directions, from Health Canada and the Government of Alberta.

### Resources

**Alberta Biz Connect – Relaunch guidance documents (multiple sectors)**

**CEMA Non-profit Insert – Is your non-profit organization prepared?**

**CEMA Business Continuity Handbook**

**CEMA Business Continuity Template**

**CEMA Business Continuity Template – Reference Guide**

**Coronavirus Disease (COVID-19): Prevention and Risks**

**COVID-19 Info for Albertans**

**COVID-19 Social Sector Information and Resources**

**The Canadian Centre for Occupational Health and Safety – Business Continuity Plan – Pandemic**

### Industry specific resources

Person-centric services and industries have been hit hard by the COVID-19 pandemic. Those staff who work directly with clients have had to stop or alter how those services were provided to ensure client and staff safety. As many services that were in-person are now being provided by organizations online or assisted with technology, it is important to review best practices specific to professions that organizations may employ to ensure they are providing the same level of care and service in an online environment as they were offline.

While there are general impacts (in person care is now virtual), there are also industry specific considerations that professionals need to consider. For example, social workers who normally offer in-person services (client visits, in-office meetings, regular in-person check-ins etc.) may have to move to providing virtual treatment. The best practice then, would be for social workers to consult their professional organizations for recommendations on delivering that kind of service to their target client base in a virtual environment. Best practices can be technical (which are the best, most secure online platforms, establishing consent virtually, etc.) or for improving the experience for clients (lighting in your home office, sound quality, therapeutic techniques for online care).

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Another important consideration is the legal consequences for professionals when changing service delivery methods. Many professionals who provide client-centric care will have require confidentiality agreements or informed consent, and that requirement will likely continue despite the impact of COVID-19. Professionals are still responsible for acquiring consent, but the way that is done has to change due to the specifics of the current emergency. Professional organizations will likely have updated their policies or provided alternative ways of providing informed consent, and both professionals and the organizations that employ them need to be aware that there are legal best practices that need to be maintained to ensure professional and confidential service delivery.

At this point in the lifecycle of the pandemic, many of the professionals that organizations employ or work with will have established best practices specific to COVID-19. Organizations who work with professionals or employees with specific training should be reviewing best practices for that profession, as many industries have released guidelines and best practices relevant to their work and how to complete it remotely with the same quality of care and service.

### Best practices

Review best practices *specific to your industry*.

- If your organization employs or utilizes the services of professionals (i.e. specific job types with specified training, professional organizations, credentials etc.) then organizations should review best practices specific to that profession. If for example your organization employs social workers then you should be **reviewing best practices for social workers during COVID-19**.

Review informed consent requirements for professionals employed by your organization.

- Have a very clear understanding of your professional and organizational liabilities when changing the way service is provided. Many professionals will have specific regulations they are required to follow when providing service, and organizations need to understand these to have a good sense of their liability.

### Resources

**Best Practices in Canadian Higher Ed** (best practices for multiple sectors)

**Best Practice Recommendations for Health Professionals**

**National Association of Social Workers Coronavirus**



# Virtual service delivery

Before exploring the specifics of virtual service delivery, it's important to highlight the importance of obtaining proper informed consent from clients in an online environment. This applies to all forms of service delivery that are at all confidential or sensitive, despite being at home or in private spaces, informed consent and privacy still needs to be properly maintained for clients. Many industries will have their own standards for this, and documents such as *Telehealth Clinical Guidelines* published by the Government of British Columbia provide concise, tactical advice for obtaining consent properly via Telehealth. How the informed consent process works will differ from organization to organization, service to service, profession to profession. Despite these differences, best practice is to review and ensure that when your organization is providing service electronic informed consent is secure and kept to the same standard as is required.

## Virtual counselling services

Counselling services covers many services from life coaching to complex care plans. Many organizations will employ a counselling service or professional, and as always it is important to make sure that those services are working effectively for both client and staff.

Counselling services are very different depending on the organizational goals, individual practitioner, or needs of the client. Therefore, it is necessary to review the kinds of counselling services that are being offered, and then explore the best practices surrounding that kind of service provision. PolicyWise hosted a webinar called **Caring at a Distance: Online Counselling Best Practices** during COVID-19, and it is our recommendation that any organization providing counselling services during COVID-19 should review this webinar (see resources below).

Technology also has an impact on the quality of service delivered. The quality of the online environment is important to maintain, both for clients as well as employees providing service. Platforms like Zoom or Doxy are great at reaching clients and providing that virtual space, however there is growing literature on the impacts on employees of spending long periods of time in these virtual spaces. A phenomenon called "Zoom fatigue" is being researched and is focused on the mental fatigue working virtually like this has on providers.

Understanding best practices in virtual counselling services, if organizations are using these online environment platforms, means understanding the impacts working like this has on staff as well as clients. It is important to make these spaces comfortable for clients, but it is equally as important to know how they impact providers so that they themselves do not become fatigued and provide sub-standard service.

## Best practices

Review PolicyWise webinar **Caring at a Distance: Online Counselling Best Practices** for any organization providing virtual or modified counselling services.

Review literature and best practices literature specific to the technology your organization is using to provide service.

## Resources

**Guidelines for the uses of Technology in counselling & psychotherapy**

**PolicyWise – CFS – Caring at a Distance: Online Counselling Best Practices** (counselling and psychological services)

**The reason Zoom calls drain your energy**



### Virtual mental health services

It is important to note that providing mental health services is a type of service delivery that should only be undertaken by trained professionals. As well, there are diagnostic and professional differences between providing counselling services, and mental health services. This section addresses virtual mental health services, which address specific, often challenging client issues that may involve a previous diagnosis of mental health issues. These kinds of mental health issues are often more complex than what counselling services may be trained to address.

There are many resources available on how professionals who are trained in providing mental health services, can transition their care networks and practice into online environments successfully. In 2018 the Mental Health Commission of Canada curated an extensive program document called **Toolkit for E-Mental Health Implementation**. In this toolkit, the authors go through step by step the process and best practices for establishing a new e-mental health service. Organizations that have mental healthcare professionals and provide mental healthcare services should review this document as it provides worksheets and checklists, as well as practice scenarios to ensure that the best care possible is provided.

There are also best practice recommendations that are specific to different mental health diagnoses. **Oxcadat Resources** for example, has a series of best practice information specific to delivering services addressing PTSD, social anxiety and panic disorders. Each disorder is different, and the clinical needs of clients will impact the ways in which those services are best provided.

Organizations providing virtual mental health services, administered by professionals, should follow previous recommendations provided above (reviewing professional best practices, technological best practices, etc.) as well as the Toolkit for E-mental Health Implementation.

### Best Practices

Review **Toolkit for E-Mental Health Implementation** to ensure that the best practices for providing mental health services relevant to your organization are being followed.

### Resources:

**Toolkit for E-Mental Health Implementation**

**Best Practices in Videoconferencing-based telemental health**

**Oxcadat Resources – Remote Delivery Guides (COVID-19)**

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### Virtual health services

Providing virtual health services is a model that has become increasingly popular even before the pandemic. The ability to reach remote communities and clients through technology have the potential to provide health care to populations that may be otherwise underserved. There is a growing body of literature authored before and during the pandemic exploring how these technologies can be used to deliver important health services online. While there is no replacement for in-person care, many health services and consultations can be provided in ways that are convenient to people accessing services and still manage to meet outcomes.

If an organization utilizes health professionals, and they are providing services virtually, then it is very important that they are following the current best practices for virtual health service delivery. The resource **Best Practices in Canadian Higher Ed** is a resource that looks at specific health practitioners and provides best practices for both administering online care to patients, and how to transition in-person care to online care. For example, there are specific guidelines around how the service provider maintains technology in order to ensure a similar level of quality to the care provided to clients. Active listening techniques specific to audio/video communication are extremely important both to build trust with the client and to ensure the practitioner receives the correct information. This is a best practice that is both very specific to health care providers, but also applicable to anyone providing person-centric care online with an audio/video component.

### Best practices

Overall providing virtual medical services is an important type of service delivery that relies on the technological infrastructure that organizations and/or healthcare practitioners can provide for clients as well as best practices specific to each profession (see *Industry specific resources* above). Organizations should review best practices around the technology they use (DOXY, Zoom, MTeams etc.) as well as best practices for providing medical services virtually by specific healthcare roles.

### Resources

**Transitioning to remote health & wellness services in post-secondary settings**

**Remote treatment delivery in response to the COVID-19 pandemic**

**Telehealth transformation: COVID-19 & the rise of virtual care**

**Guidelines for best practice in the provision of telepsychotherapy**

**Use of Telemedicine and Virtual Care for Remote Treatment in Response to COVID-19 Pandemic**

**Telehealth Clinical Guidelines**

# Other considerations

## Age, gender, and language

Many organizations work with and provide service to populations experiencing vulnerabilities. What is important to take into consideration given the current COVID-19 pandemic is how those vulnerable populations are impacted differently, and how that might interfere in virtual service delivery.

Childcare, age, language, or access to technology all impact how people interact with and experience accessing or receiving services. Organizations need to be keenly aware of the needs, limitations, and barriers that exist because clients might not have the time, knowledge, or technology to receive services via Zoom. Some municipalities have taken steps to ensure that the population experiencing homelessness for example has access to clean washrooms and wifi, to help both slow the spread of COVID-19 and to provide technological infrastructure for citizens experiencing homelessness to access the internet and receive services.

While many of the best practices in this document deal with different technological requirements, using different software and audio/video equipment assumes that clients have access to these technologies and high-speed internet. This is not the case depending on the client or population organizations are working with or providing service to. Many individuals do not have the same access to technology or technological infrastructures to access service the same as other clients, and this must be taken into consideration depending on the client or population.

## Best practices

Provide instructions on how to wash hands and avoid spreading COVID-19. It is important to provide these instructions in the main language(s) used by the client or vulnerable population in question. The federal government suggests the following for providing essential health information: Provide information in the most commonly used language in the community.

- Use short messages that explain simple steps they can take.
- Use large font and graphics.
- Use accessible instructions (e.g., braille, pictorial).
- Post signs in common areas near sinks, entrances, intake areas, restrooms, sleeping areas, recreation areas, waiting rooms.

If you think one of your clients is sick with COVID-19 the federal government recommends contacting your local public health authority

## Resources

**COVID-19: Seniors & Vulnerable People**

**COVID-19 Support for Individuals**

**Vulnerable populations and COVID-19**

# Final thoughts

There are a variety of best practices and resources available that can provide some guidance on how best to continue work in a safe and effective way. In addition, there are best practice documents available for many industries and professions, and organizations who are employing or working with professionals or providing specific services need to review their best practices. Reviewing the best practices that are specific to an organization, client group, and work area is paramount to continuing to provide the high level of service delivery that Calgarians expect and need during this difficult time.