



# **Standard Guide for Incorporating Remote Program and Service Provision into a Multi-modality Service Delivery Approach**

Access Alliance Multicultural Health and Community Services  
2023

# Table of Contents

<b>Introduction</b> . . . . .	3
<b>Six Best Practices for Remote Program and Service Delivery</b> . . . . .	5
<b>Six Best Practices and Their Guidelines in Action</b> . . . . .	7
<b>Overarching &amp; Organizational</b> . . . . .	7
Best Practice 1	
Best Practice 2	
<b>Client Focus &amp; Digital Equity</b> . . . . .	10
Best Practice 3	
Best Practice 4	
Best Practice 5	
<b>Human Resources</b> . . . . .	13
Best Practice 6	
<b>Conclusion</b> . . . . .	14

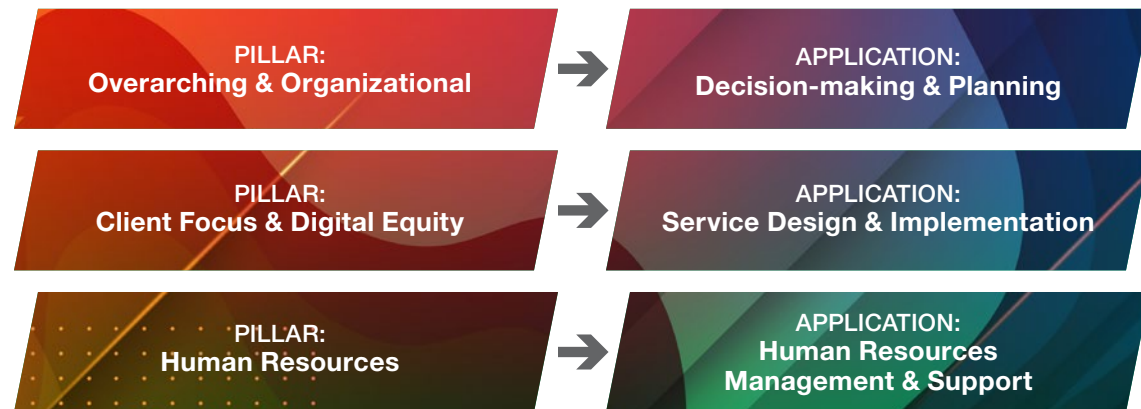
# Introduction

Access Alliance is committed to developing and adhering to key principles of remote program and service delivery, within the greater context of digital equity.<sup>1</sup> This work is directly related to the agency’s second strategic priority in the 2022 to 2024 strategic plan:

**We will identify promising practices that enhance support to our high priority populations and influence system change.**

This guide outlines best practices, key principles and tools to use when contemplating or incorporating remote<sup>2</sup> service delivery into Access Alliance’s service delivery model. The material in this guide was developed and gathered through a literature review, staff and management interviews, management team feedback and ongoing research. It is aligned with [agency values](#), [the quintuple aim](#) and [select HSO virtual health standards](#).

The six best practice standards are grouped according to three factors regularly taken into consideration at Access Alliance when making decisions: agency, clients and staff. Each factor is presented as a pillar. Guidelines and tools support the practical application of what each pillar represents. These are aspirational standards. The agency may not meet all of them right now; however, it will work towards achieving them.



1 Digital equity refers to equal access and opportunity to digital tools, resources, and services to increase digital knowledge, awareness, and skills.  
2 We have chosen to use “remote” rather than “virtual” or “online.” This includes telephone, video, text and email communication.

*Introduction (continued)*

This graphic depicts the connection between organizational priorities, pillars and applications.



# Six Best Practices for Remote Program and Service Delivery

The following best practices derive from the literature search, staff consultations, and meetings with the project team. Together, this set of best practices constitutes the standardized way in which Access Alliance carries out design and delivery across the agency, integrating remote delivery into the existing quality assurance process.

Best Practice Standards	Pillar and Application
1. <b>Key principles</b> for digital programs and services that stem from the agency's strategic goals, service approach and knowledge of clients, are developed and shared with staff.	PILLAR: Overarching & Organizational APPLICATION: Decision-making & Planning
2. The agency provides remote delivery of services, as appropriate, as a means to <b>achieve the intended outcomes</b> of the program or service.	
3. The agency has a <b>digital equity screening protocol</b> to determine at intake or other points of care the training and support needs of clients so that they can participate meaningfully in the programs and services they need and want.	
4. Agency staff, volunteers, and students support clients' digital literacy <b>skill building</b> , in a structured manner.	PILLAR: Client Focus & Digital Equity APPLICATION: Service Design & Implementation
5. The agency is committed to protecting the safety of participants and clients in remote programs and services, ensuring that programs and services have norms and guidelines that address or consider <b>safety and confidentiality</b> .	
6. The agency commits to <b>supporting staff</b> with the integration of remote service and program delivery into the hybrid environment.	PILLAR: Human Resources APPLICATION: Human Resources Management & Support

## *Six Best Practices for Remote Program and Service Delivery (continued)*

This is a living document that will grow and change over time. It contains links to tools and resources. Staff are encouraged to give feedback on existing tools and to add new ones by talking with their managers. Directors will ensure that managers have a forum to discuss proposed additions or changes. Final additions and changes will be shared with staff through email and all-staff meetings.

### **Key Assumptions**

- In-person and remote services for individuals and groups will form part of an integrated service model. Clients may receive a mix of in-person and remote service.
- Client preference for either in-person or remote participation in programs and services will be addressed on an individual basis, taking health concerns, barriers to getting to an in-person visit, professional judgement, current plans, needs and capacity of the agency, staff and client into consideration.
- There will be times when providers require clients come in person. Decisions will be made according to appointment requirements.
- Agency practices will not infringe on directives from regulatory bodies, as they relate to staff from regulated professions.

# Overarching & Organizational

## BEST PRACTICE 1

Key principles for digital program and service delivery that stem from the agency's strategic goals, service approach and knowledge of clients, are developed and shared with staff.

The following **principles** have been adapted from Digital Transformation – a Knowledge Mobilization Resource for the Immigrant and Refugee-serving Sector, Marco Campana, March 24, 2020, using staff input from consultations during the standardization project.

- Remote service is still client service.
- Privacy and confidentiality are essential.
- There will be no loss of human service interaction with clients.
- Program and service accessibility is a key consideration.
- Remote programs and services will not suit all clients.
- There will be a minimal increase in workload for staff. Staff will experience a change in how they work with some of their clients.

- Remote services must complement existing services and be integrated with in-person delivery.
- Remote service provision must contribute to meeting client service targets.
- The agency maintains its focus on quality service.

These principles are shared with all staff when this manual is introduced and during the orientation process for new staff. Revisions to best practices and principles are developed based on consultation with key stakeholders, including staff, and current practice. They are aligned with the agency's [strategic priorities 2022-2024](#).

## **BEST PRACTICE 2**

The agency provides remote delivery, as appropriate, as a means to achieve the intended outcomes of the program or service.

- a. The agency has criteria for determining which programs, services and tools are suitable for remote delivery, when remote delivery is suitable and which platforms/modes are best to use. Criteria include improved access, more efficient use of resources, equity and service quality. The agency will take input from clients and staff into consideration when making decisions.
- b. The agency integrates remote delivery into current programs and services, and the regular program planning cycle.

### **Key Assumptions:**

The following guidelines and documents are subject to change. Integrating remote programs and services will be part of the regular planning cycle. The agency will assign a MRP (most responsible person) to curate and review the supporting materials linked to the standard guide, according to a schedule aligned with agency policy review protocols.



## Overarching & Organizational: Best Practice 2 (continued)

Guidelines and Procedures	Tools
A champion or champions within teams encourage others to buy into any new processes and learning related to digital equity.	• <a href="#">Clinician Change Virtual Care Toolkit</a> – Canada Health Infoway
Staff make informed decisions about what to deliver <a href="#">in person vs. remote</a> .	• <a href="#">Decision-making Criteria</a>
Staff have a <a href="#">back-up plan</a> in case of a sudden need to switch to remote program and service delivery.	• <a href="#">Clinically Appropriate Use of Virtual Care – Guidance for Primary Care</a> – Ontario Health
Staff have access to <a href="#">factors to take into consideration</a> in decision-making and planning. This list was generated through staff interviews.	• <a href="#">Line of Inquiry</a> – a list of questions to guide the assessment of the existing mode of delivery, suitability of remote delivery (when it’s an option vs. services that must be delivered in person), decision-making criteria, implications on achieving desired outcomes, and desired mix of delivery methods
Sufficient time is incorporated into the planning cycle to use the tools provided and to reflect on their use.	• <a href="#">Nonprofit Services Canvas</a>   <a href="#">marcopolis.org</a> – adaptation of an existing tool for use by staff in nonprofit organizations as they think through new project ideas
Managers take various factors into consideration before approving or making changes to program and service delivery. These include the planning cycle, evaluation and timing.	• <a href="#">Sample Client Personas</a> – a small selection of “typical” client profiles to help guide decision-making and planning
Staff are encouraged to bring issues to their manager, especially when program or service outcomes might be compromised.	• <a href="#">Staff Tips for Using Zoom</a> – a collection of tips from staff and links to online resources
Staff refer to relevant agency policies and practices; for example, the use of email, <a href="#">Non-management Cell Phone Policy</a> , instant messaging to communicate with clients, <a href="#">Confidentiality Policy</a> , <a href="#">Information Technology and Systems Policy</a> , <a href="#">Accessibility</a> , <a href="#">Customer Service</a> , <a href="#">Integrated Standards Policy</a>	• <a href="#">Zoom Support for Paid Account Holders</a>
<a href="#">Accessibility for Ontarians with Disabilities Act</a> requirements are met.	
<a href="#">Social Media Guidelines</a> are followed.	

# Client Focus & Digital Equity

## BEST PRACTICE 3

The agency has a digital equity screening protocol to determine at intake or other points of care the training and support needs of clients so that they can participate meaningfully in the programs and services they need and want.

- a. Staff check in from time to time to determine whether clients' digital equity situation has changed.
- b. The agency may survey clients.

### Guidelines and Procedures

As appropriate, use the information from the digital equity screening protocol to identify client strengths and areas of need and to plan programs and services. Individual staff may choose to keep a spreadsheet with this information in order to have a visual snapshot of their clients' digital equity.

Help secure devices and internet access for those in need, where possible. This may include

- requesting funds for devices in grant applications
- problem-solving through partnership and community connections

### Tools

- [Assessment of Clients' Digital Equity](#) – a sample standard tool
- [Basic Digital Skills](#) – a listing of basic skills clients require. This listing may be expanded to suit the requirements of individual programs and services.
- [Spreadsheet](#) for visual snapshot of Clients digital equity
- [Wi-Fi Hotspots](#)
- AA's Internal tablet / laptop loan booking (youth program, seniors' program, settlement program)

## BEST PRACTICE 4

Agency staff, volunteers and students support clients' digital literacy skill building, in a structured manner.

### Guidelines and Procedures

As appropriate given staff's role, support the teaching the basics of digital literacy to clients, including what clients need to know in order to participate in particular programs and services. This may include partnerships with other organizations.

Develop or link to plain language, step-by-step guides for clients to use; for example, a primer on the basics of setting up an email address or video tutorials on digital literacy. Translate this information and make it available for staff to share with clients and review it with them.

### Tools

- [Connect With Dignity I #1 Introduction to Your Phone](#) - YouTube
- [Connect with Dignity I #2 How To Make a Phone Call](#) - YouTube
- [Connect With Dignity I #3 How to Send a Text Message](#) - YouTube
- [Connect With Dignity I #4 Photography Time!](#) - YouTube
- [How to Use an Android Tablet \(with Pictures\)](#) - wikiHow
- [Digital Literacy Phone Basics](#) - ISS of BC - Janis's ESL
- [Email-Android](#) - ISS of BC - Janis's ESL
- To consider: digital literacy days and events

### BEST PRACTICE 5

The agency is committed to protecting the safety of participants and clients in remote programs and services, ensuring that programs and services have norms and guidelines that address or consider safety and confidentiality.

- a. The agency shares norms and guidelines with clients.

**Key Assumption:**

The term “safety” is used broadly to encompass client engagement.

#### Guidelines and Procedures

Individual programs and services determine the key points that should be covered and shared with clients regarding safety and confidentiality.

The agency has a standard approach to the following:

- informing clients of the risks, benefits and limitations of remote service delivery so they may make informed choices.
- obtaining client consent to remote services.
- obtaining signed waivers that may be required for remote program and service delivery.

To consider: Assess the risks and benefits of recurring versus fresh meeting links for programs and develop a guideline

Staff refer to relevant agencies policies, such as

- [Client Privacy and Confidentiality Policy](#)
- [Managing Difficult or Disruptive Client Behaviour](#)

#### Tools

- [Clinician Change Virtual Care Toolkit](#) – Canada Health Infoway
- [Seniors’ Program Code of Conduct](#) – an example of what can be developed and shared with clients in advance. Alternatively, staff suggest putting guidelines for participation on the screen in the waiting room in Zoom.
- [Staff Tips for Using Zoom](#) – a collection of tips from staff and links to online resources
- [Tips for Recording Remote Sessions](#)
- [Best Practices for Securing Your Zoom Meetings](#) – Zoom
- [Zoom Security Best Practice](#)
- Ongoing cybersecurity training for staff, students and volunteers

# Human Resources

## BEST PRACTICE 6

The agency commits to supporting staff with the integration of remote service and program delivery into the hybrid environment.

- a. Agency management acknowledges and addresses the change inherent in this transition.
- b. Agency management provides supports and monitors the impact on staff of the integration of remote service delivery.

### Guidelines and Procedures

Management provides clear, up-to-date expectations to staff about incorporating remote program and service delivery.

The current level of staff expertise and gaps with respect to their digital literacy knowledge and skills are assessed.

Management considers investing in program design and in facilitation training for remote program delivery.

Management considers hosting professional development sessions with invited subject matter experts.

The agency supports ongoing training on emerging and existing technology for staff to incorporate into their work.

Management models curiosity and embracing new ways of doing things.

A question about remote service delivery is incorporated into regularly scheduled 1:1s or touch base with staff, as well as annual performance reviews (explore satisfaction with current supports and additional training supports needed).

Staff are supported in finding solutions that will increase the efficiency of remote delivery.

### Tools

[Assessing Staff's Digital Literacy – Sample Tools](#)

To consider: a list of guest speakers and/or trainers who can share their knowledge with staff

# Conclusion

We hope this guide is useful to staff, volunteers, and students in guiding their practice while engaging with Access Alliance and its clients and community. This guide is a living document as the remote and digital world is in constant evolution. Staff are encouraged to share resources, innovations, and tools with management that may contribute to the relevance and ongoing improvement of this document.