Conducting an Outbreak Hotwash: Tools and Tips

Why hotwash or debrief?

Taking time to hotwash or debrief an outbreak allows outbreak investigators to acknowledge parts of the outbreak investigation that went well and those that were challenging. Outbreak successes should be celebrated, documented, and repeated. Challenges should be explored further, alternatives discussed, and action items identified. Hotwashes are also called after action reviews.

Most public health agencies do not have time to hotwash every outbreak they investigate. If your agency is only able to hotwash a few outbreaks each year, select outbreaks that were challenging, had poor outcomes, and/or were particularly complex.

Setting up your hotwash

It is best to hotwash an outbreak as soon after the end of the investigation completion as possible. Aim to hotwash within 2 months of the end of the outbreak.

Include people who were involved in the outbreak investigation. Your hotwash may include people from multiple public health agencies and multiple programs within each agency. Depending on the outbreak, you may want to invite:

- State public health
- Local public health
- Federal partners (if an EpiAid was called, for example)
- Epidemiologists
- Public health nurses
- Environmental health specialists/consumer protection/sanitarians/inspectors
- Regulatory partners (health facilities, FDA, USDA)
- Laboratorians
- Emergency preparedness staff
- Public health directors/leadership
- Public information officers
- Legal council

Depending on the complexity of the outbreak and relationships between participants, you will likely need between 2 and 3 hours to conduct a hotwash.

Schedule a room that will comfortably fit everyone in your group and has ample wall space for flip chart pages. Try to meet at the agency that has the most people participating in the hotwash or were the lead agency on the outbreak.

An external facilitator may be helpful. . Since most agencies do not have a budget for an outside facilitator, consider using a facilitator from another program in your agency or someone who was not heavily involved in the outbreak investigation.

It is preferable to have everyone attend the hotwash in person, but if necessary it is possible to conduct the hotwash using videoconferencing. There is a section at the end of this guide about videoconference hotwashes.

Preparation

Prior to the hotwash, you will need to prepare by setting the agenda, selecting topic areas on which to focus, and preparing materials. Most participants will not need to prepare for the hotwash. The only exception would be having someone familiar with the outbreak investigation prepare a brief (5 minutes) overview of the outbreak.

Creating an agenda

Your agenda will include most of the following components:

1. Introductions
2. Ground rules
3. Outbreak overview
4. Individual brainstorming
5. Combining information by topic area
6. Discussion
7. Summarize action items and assign person(s) responsible

Assign a person to lead/facilitate each section. As the facilitator, you will likely lead/facilitate more sections than anyone else will, and may lead all but the "outbreak overview". A sample agenda is included at the end of this document.

Select topics

To organize people's thoughts and the discussion, it is helpful to have pre-planned topic areas. The topic areas should reflect key aspects of the outbreak investigation. Each hotwash should include:

- Overall investigation
- Other

Topic areas may also include:

- Environmental health investigation
- Epidemiology investigation/study design
- Case investigations
- Contact investigations
- Laboratory testing
- Communication INTERNAL (within and between PH agencies)
- Communication EXTERNAL (press releases, working with industry, etc.)
- Legal matters

- Regulatory issues
- Other things specific to your investigation

Have key persons from each agency review and approve the agenda and topic areas.

Preparing materials

Prior to the hotwash, prepare materials and written documents.

Bring a sign in sheet that has spots for name, role/job title, and agency. This will be very helpful when compiling the hotwash minutes. A sample sign in sheet is included at the end of this document.

Have ground rules prepared and written/printed. They can be on a PowerPoint slide, a flip chart page, or the printed agenda. It is good to have 3-5 ground rules prepared. They may include:

- Allow everyone to be heard
- State your name before speaking (if using videoconferencing)
- Be brief and meaningful when voicing your opinion, to maximize the time together
- Critique ideas, not people
- Disagree without being disagreeable
- Speak from "I" and listen from "We"
- Everyone participate, no one dominate
- Listen to understand
- One speaker at a time
- Remember responsibility and non-defensiveness
- Stay out of the weeds and swamps

Have each selected topic for discussion written across the top of a flip chart page. Underneath write successes and challenges:

Laboratory Testing	
Successes	Challenges

It is ideal to use adhesive flip chart pages so they can be stuck on the wall of the meeting room.

Also, bring post-it notes and pens for each participant.

To evaluate the hotwash, have a brief evaluation prepared for participants to complete at the end of the session. A sample is provided at the end of the document.

Running the hotwash

Arrive 15-30 minutes early to get the room set up for the hotwash. If possible, have all participants sitting in a circle/facing one another. Place post-its and pens at each seat.

Now it is time to facilitate the hotwash. Follow these general steps for the hotwash:

1. Introduce yourself and explaining your role as the facilitator. Specify if you had any involvement in the outbreak being hotwashed.
2. Briefly review the agenda
3. Go around the room with introductions. Ask each person to introduce him/herself with name, agency, and role in outbreak investigation.
4. Review ground rules with the group. Ask if there are any ground rules people would like to add. Ask if anyone objects to the ground rules.
5. Have designated person give a brief overview of the outbreak
6. Tell the group that next they are going to individually brainstorm about the outbreak for 5 minutes using the post-it notes. Say that at the end of 5 minutes they will place their post-its on the large topic post-its around the room, so consider these topics while writing notes. Walk around the room reading each topic to the group.
7. Time 5 minutes (or so) for the group to brainstorm. In general, wait to move on until almost everyone in the group has stopped writing.
8. Have participants get up, walk around, and place post-its on the topic sheets.
9. Once everyone is seated again, make general comments about the brainstorming, such as:
    a. "I'd like to point out that there are more notes under successes than under challenges. That indicates that this was a great outbreak investigation and we can identify things to repeat in future outbreak investigations."
    b. "Thank you for taking the time to make all these notes. This will give us a great basis for discussion."
10. Walk around the room (starting with "Overall Investigation") and discuss each sheet. At each sheet:
    a. Make 1-2 summary statements about the notes; it may be helpful to cluster similar comments together on the flip chart page
    b. Ask people to add, elaborate, or discuss
    c. If action items are identified, write them on another flip chart page
    d. Refer to ground rules if discussion becomes too heated

    e. As the facilitator, guide the amount of time on each sheet so that you have time to cover each topic
11. After all topics have been covered, review the identified action items. Assign a person responsible for each action item. Agree on a time period (1 month later, 3 months later, 6 months later) that the group will follow up with the people assigned action items to assess progress.
12. Tell the group that you will send them the minutes for review within two weeks.
13. Thank the group for their time and thoughtful discussion.

Following up after the hotwash

Type up the post-it notes by category and add any further discussion/comments. Include action items and person responsible (template available at the end of this document). This will be the hotwash minutes. Within two weeks, distribute the minutes from the hotwash to all meeting participants. Ask them to give you any feedback/changes within two weeks. Make changes, if needed, and send final minutes to everyone.

Follow up by email with the persons responsible for action items at the agreed upon timeframe. As action items are completed, inform the group by email.

Conducting hotwashes by videoconference

While it is preferable to have everyone attend in person, hotwashes can be conducted by videoconference. Skype, Zoom, Google Hangouts, or any other videoconferencing platforms can be used. When conducting a hotwash by videoconference:

- All participants should attend by videoconference. It becomes complicated to have some participants in the room and others on videoconference, usually resulting in a less productive hotwash for video participants.
- Limit people to 1-2 persons per screen. Agencies with a large number of participants should break up into smaller groups to attend the videoconference.
- Require participants to use web cameras.
- Hold “office hours” in advance to allow participants to practice logging onto and using the video conference platform.
- Keep screen sharing to a minimum, as participants are more talkative when they can see one-another.

Schedule two meetings to conduct the hotwash. When not specified, use the same techniques and tools discussed above.

The First Meeting:

1. Schedule for one hour (may end early).
2. As participants log on to the videoconference, remind them how to mute themselves, how to chat/type questions, and how to edit the name under their picture (if available in your videoconference platform).

3. Introduce yourself and explaining your role as the facilitator. Specify if you had any involvement in the outbreak being hotwashed.
4. Briefly review the agenda.
5. Call on people one at a time to introduce themselves, going across your screen. Participants will be in different orders on each person's screen. Ask each person to introduce him/herself with name, agency, and role in outbreak investigation.
6. Review ground rules with the group. Ask if there are any ground rules people would like to add. Ask if anyone objects to the ground rules.
7. Have designated person give a brief overview of the outbreak
8. Explain to the group that their homework before the next meeting is to provide feedback on the outbreak. Their feedback will be organized by topic area. Share the topic categories using share screen or chat capabilities. Ask if there are any the group would like to eliminate or add. Encourage folks to give brief, concise feedback as if they were writing it on a post-it note.

Between the meetings:

1. Send participants survey (google forms, survey monkey, epi info, qualtrics, etc.) that asks them to list successes and challenges in each category. Considering limiting response lengths to get brief answers. Give a due date for the survey of at least 3 days prior to second meeting.
2. Compile survey results, summarize key points and number of people who made comments. This summary will be the base of minutes. Send summary to participants 1 day prior to second meeting and suggest they have a printed copy for the second meeting.

The Second meeting:

1. Schedule for 1.5 hours, typically 2 weeks after first meeting.
2. Remind participants of the ground rules they agreed upon during the first session.
3. Remind participants that they have summary document of participant feedback.
4. Structure discussion as you would in person hotwash (see above). Limit screen sharing, instead referring participants to the summary document they received prior to the meeting.
5. List action items in the chat box as they are created.

After the meetings:

1. Send hotwash evaluation by online survey.
2. Create minutes using summary document that was sent to participants before the second meeting (updated based on discussion and participant list).
3. Send minutes to group within 2 weeks, requesting feedback/changes. Update, if necessary, and provide final minutes to the group.
4. Follow up on action items as you would with in-person hotwash.

Sample sign in sheet for the meeting

Outbreak of [DISEASE] in [LOCATION]
Hotwash

Date: Time: Location:

Facilitator:
Attended by:

Name	Agency	Title/Role

Sample agenda= to be used during meeting

Agenda

1. Introductions/All
2. Ground rules/Facilitator
3. Outbreak overview/Outbreak Investigator
4. Individual brainstorming/All
5. Discussion/All
6. Summarize action items and assign person(s) responsible/Facilitator

Ground Rules

1. Be brief and meaningful when voicing your opinion, to maximize the time together
2. Critique ideas, not people
3. Speak from "I" and listen from "We"
4. ...additions?

Brainstorming and Discussion

- Overall
- Case Investigations
- Testing employees and communication of test results to individuals and restaurant management
- Epi investigation
- Communication INTERNAL (within and between PH agencies)
- Communication EXTERNAL (press releases, Facility, etc.)
- Laboratory supplies, testing, and courier
- Legal matters
- Other

Sample action item tracking sheet

Follow Up

	Action Item	Person(s) Responsible
1		
2		
3		
4		
5		

Sample evaluation (can print two to a page)

Facilitation Evaluation

[Name and location of outbreak]
[Date]

(1) Strongly Disagree	(2) Disagree	(3) Neither Agree nor disagree	(4) Agree	(5) Strongly Agree

The facilitator helped our group to:

	1	2	3	4	5
Ensure all participants were given opportunities to express their views	☐	☐	☐	☐	☐
Communicate respectfully with each other	☐	☐	☐	☐	☐
Use time effectively	☐	☐	☐	☐	☐

The facilitator demonstrated

Objectivity	☐	☐	☐	☐	☐
Excellent communication skills	☐	☐	☐	☐	☐

What part of the facilitation did you feel was particularly useful?

What could be done to improve future meetings?