

## **Providing SMRC Suite of Self-Management Workshops Using a Virtual Platform**

### **Virtual Workshop Pre-workshop Preparation Tips:**

#### **❖ Organization:**

- Virtual platforms have varying features, capabilities and security. Refer to “April 2020 online tools and tips” and “Tools for Reaching a Remote Audience” for a more detailed description.
- Get an organization license or subscription to the platform, as needed. Some platforms, such as Zoom only allow 40 minute of free meeting time. You will need a longer timeframe to hold a workshop.
- Identify at least 1 person to become the organization’s expert in using the virtual platform. The expert should familiarize him or herself with how to use the platform from different devices (e.g. laptop, tablet, smartphone).
- Provide someone to be part of the workshop for leaders, as needed, to be a technical support person. This allows leaders to focus on facilitation and not trouble shooting.

#### **❖ Leaders:**

- Poll leaders to determine who is comfortable using virtual technology to deliver the program.
- Have leaders who want to conduct virtual or distance learning download the needed software or app (such as Zoom)
- Hold meeting with leaders to practice how to lead/facilitate via a virtual platform
- Teach leaders how to do key features of the virtual platform that will be needed – audio, camera, viewing participants, using comments feature, etc. Show leaders how it is possible to share a screen so that slides (of charts) can be viewed. In some platforms, there will may be other features to learn such as small break-out groups or a white board.
- Have a technical support person be available (and/or part of the first few sessions) to support leaders who are new to leading virtual workshops/technology.

#### **❖ Participants:**

- Have a session zero where you invite participants to log-in and see how to use key features. Get this out of the way in advance of session 1. Key features include:
  - Audio on/off: Show how to mute/unmute yourself and how to connect to audio from your computer or call in on your phone
  - Camera on/off: Show how to turn your camera on/off. Explain that when their camera is off and the screen is black the leaders cannot see them
  - Post comments: Explain where the chat box is located and how to send group and private messages
  - Change the view from speaker view to gallery (or multiple people at once) view
  - Raise hand or react using emoticons (depending on the platform)
  - How to contact the leaders or organizational support person for technical assistance
- Screen size and features (including the location of audio, camera, comments, and icon to change view from speaker to multiple may be located at different locations on the device being used - a computer, laptop, or smartphone.

### Virtual vs. In-Person Facilitation Tips:

<u>In-Person</u>	<u>Virtual</u>
<ul style="list-style-type: none"> <li>Attendance Sheet.</li> </ul>	<ul style="list-style-type: none"> <li>Leader takes attendance based on name of who logs-in.</li> </ul>
<ul style="list-style-type: none"> <li>Volunteer for Action plan and Feedback, then go around table with rest of the group.</li> </ul>	<ul style="list-style-type: none"> <li>Volunteer for Action plan and Feedback (ask to raise hand, type “I’ll go” in chat box, or unmute and say “I’ll go.”), then call on people in the order that the you see them on your screen. Or, call participant names alphabetically/reverse alphabetically so they have an idea when their turn is coming up.</li> </ul>
<ul style="list-style-type: none"> <li>Anyone with ideas shares them with brainstorm.</li> </ul>	<ul style="list-style-type: none"> <li>Leader facilitating can (a) ask anyone with an idea to raise their hand, then call on people, (b) ask people to unmute and answer if they have an idea – may get multiple replies at one time.</li> </ul>
<ul style="list-style-type: none"> <li>Scribe writes down words to brainstorm, problem-solve, or other topics where ideas are generated.</li> <li>Flip chart or white board.</li> </ul>	<ul style="list-style-type: none"> <li>Leader not facilitating will write brainstorm or problem-solve topic on a blank sheet of paper. Use Sharpie or marker to write down ideas. Let facilitator know when you can take 1-2 more.</li> <li>Leader facilitating will repeat ideas said to scribe.</li> <li>Scribe to read back ideas for brainstorm or problem-solve.</li> <li>Scribe or facilitator (you can pick) reads any ideas not listed for a brainstorm.</li> <li>Some virtual platforms have a white board feature. You can use white board to scribe ideas. This is more sophisticated and may not be ideal for most leaders.</li> </ul>
<ul style="list-style-type: none"> <li>Handwritten charts as they appear in the Appendix.</li> <li>Write out a math calculation or word on the board (e.g., CDSMP, DSMP).</li> </ul>	<ul style="list-style-type: none"> <li>PowerPoint or PDF of charts as they appear in the Appendix.</li> <li>One leader uses the <i>show screen</i> or <i>share screen</i> feature during the time that a leader would normally be standing or pointing at a chart.</li> <li>When done talking through a chart, end the screen sharing.</li> <li>Create a slide for math calculation or wording that you would have written down during a session.</li> </ul>
<ul style="list-style-type: none"> <li>Small group activities or pair-and-share activities with people who have chronic condition, are caregiver, or someone you didn’t come with to the session.</li> </ul>	<ul style="list-style-type: none"> <li>Some virtual platforms have features for break-outs. You can do this to create small groups and then bring people back together as a larger group. This is pretty sophisticated and may not be ideal for most leaders.</li> <li>Have each person report for him or herself. It will be important to model this as well (e.g. when doing cause of difficult emotions, rather than report for a partner, each person reports for themselves: “I am anxious because I am not sure I can get a medication refill.”).</li> </ul>
<ul style="list-style-type: none"> <li>Try to eliminate background noise. Speak at a volume that is good for all.</li> </ul>	<ul style="list-style-type: none"> <li>Use of headphones may help cut down on background noise.</li> <li>Ask people to mute themselves when they are not talking.</li> </ul>

	<ul style="list-style-type: none"> <li>• The leaders/technical support person should be prepared to identify and mute people who are not talking if any background noise occurs.</li> <li>• Do not participate/call in on multiple devices from the same physical location (e.g. a pair of participants who are in the same room should participate on the same device rather than separate devices). This can cause an echo.</li> <li>• Ask if everyone can hear you clearly.</li> </ul>
<ul style="list-style-type: none"> <li>• Internet service not needed.</li> </ul>	<ul style="list-style-type: none"> <li>• Reliable internet or broadband service is needed.</li> <li>• If Internet connection is poor, screen freezes, or your audio is cutting in-and-out, may need to log off and reconnect.</li> </ul>
<ul style="list-style-type: none"> <li>• Hardcopy data collection forms used (typically at session 1 and session 6).</li> </ul>	<ul style="list-style-type: none"> <li>• Call participants and ask them the data collection questions by phone.</li> <li>• Create an online survey (e.g., Survey Monkey) with the data collection questions. Participants complete surveys online.</li> </ul>
<ul style="list-style-type: none"> <li>• Meeting location selected.</li> <li>• Organization confirms that room can be confidential, ADA accessible, etc.</li> </ul>	<ul style="list-style-type: none"> <li>• Virtual platform selected for meeting.</li> <li>• Organization can make meeting secure when setting up meeting features such as requiring a password to log-on to meetings, in addition to the meeting ID.</li> </ul>