PATH Leader Toolkit
Virtual Supplement

The purpose of this supplemental Personal Action Toward Health leader toolkit is to provide you with guidance for leading the PATH programs virtually. We hope that the toolkit helps you understand key aspects of providing the program online for people in our communities.

PATH is the Michigan name for the Chronic Disease Self-Management Suite of Programs originally developed at Stanford University.

MICHIGAN Partners on the PATH

NATIONAL KIDNEY FOUNDATION® of Michigan

Local licensed organization's website:
www.nkfm.org/path

Statewide PATH Program Website:
www.mihealthyprograms.org

Self-Management Resource Center
www.selfmanagementresource.com

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Comparison of Virtual to In-Person Facilitation

In-Person	Virtual
• Attendance Sheet. • Name cards.	• Leader takes attendance based on name of who logs in. Record it on an electronic attendance sheet or hardcopy sheet and then send the names of attendees weekly to your program manager. • Ask people to change their name on screen to whatever name they want to be called during the program.
• Volunteer for Action plan and Feedback, then go around table with rest of the group.	• Volunteer for Action plan and Feedback (ask to raise hand, or unmute and say "I'll go."), then call on people in the order you see them on your screen. Or, call participant names alphabetically/reverse alphabetically so they have an idea when their turn is coming up.
• Anyone with ideas shares them with brainstorm.	• 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.
• Scribe writes down words to brainstorm, problem-solve, or other topics where ideas are generated. • Flip chart or white board.	• There are several ways to facilitate brainstorms, depending on the leader's comfort level and the platform's available features. » Some virtual platforms (e.g., Zoom) have a white board feature. You can use white board to scribe ideas. » An alternative to the white board is that the leader who is not facilitating can write the brainstorm or problem-solve topic on a blank sheet of paper and write down the ideas generated by the group. » Another alternative is to screen share and use a blank MS Word document to do the activity. • When the brainstorm or problem-solve ends, the scribe should read aloud the ideas. • Scribe or facilitator (you can pick) reads any ideas not listed for a brainstorm.

Comparison of Virtual to In-Person Facilitation

In-Person	Virtual
• Handwritten charts as they appear in the Appendix. • Write out a math calculation or word on the board (e.g., CDSMP, DSMP).	• PowerPoint or PDF of charts as they appear in the Appendix. • One leader uses the show screen or share screen feature during the time that a leader would normally be standing or pointing at a chart. • When done talking through a chart, end the screen sharing. • Create a slide for math calculation or wording that you would have written down during a session.
• Small group activities or pair-and-share activities with people who have chronic condition, are caregiver, or someone ayou didn't come with to the session.	• 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. • 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.").
• Try to eliminate background noise. Speak at a volume that is good for all.	• Using headphones may help cut down on background noise. • Ask people to mute themselves when they are not talking. • The leaders/technical support person should be prepared to identify and mute people who are not talking if any background noise occurs. • 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 on the call. • Ask if everyone can hear you clearly.

Comparison of Virtual to In-Person Facilitation

In-Person	Virtual
• Internet service not needed.	• Reliable internet or broadband service is needed. • If Internet connection is poor, screen freezes, or your audio is cutting in-and-out, may need to log off and reconnect. • Assign your co-leader be a co-host so if your internet cuts out, the workshop can continue smoothly without interruption. • People can call into meeting using phone audio and computer video.
• Organizations collect data using hardcopy forms (at Session 1 and Session 6), online forms (typically before session 1 and after session 6) or some combination thereof.	• Participants complete surveys online (typically collected before session 1 and after session 6). • Create an online survey (e.g., Formstack or Microsoft Forms) with the data collection questions. Participants complete surveys online. • Get hardcopy signature for liability waiver/consent.
• Meeting location selected. • Organization confirms that room can be confidential, ADA accessible, etc.	• Virtual platform selected for meeting. • Organization can make meetings secure with features such as requiring password to log-on, having a meeting ID, having the waiting room enabled, and ejecting participants (if needed) • Ask participants what accommodations they need during the registration process. • Provide closed captions and explain how to use them during session zero.
• Workshop not open to guests. • People attending must participate.	• Participant should find a private, quiet environment to attend the session. • Anyone sitting next to, slightly off screen, and/or in the same room should be enrolled in the workshop. “Just listening in” is not allowed.

Getting Ready for a Workshop

Virtual Facilitation Overall Guidance

- Log on and start the meeting 15 to 20 minutes before the start time. This will allow you to address any co-leader or participant questions before the session begins.
- Make your co-facilitator or technical support staff a co-host of the meeting. They can help with admitting participants, screen sharing, muting participants, etc. This will also help the meeting continue smoothly if the host experiences any internet has stability or bandwidth issues.
- Stage your video properly so that your background is appropriate. Position your light source behind your computer. This will illuminate your face and minimize shadows so that you can be seen fully. Try to set your camera at eye level.
- As a meeting host, you can turn off someone's video if needed to block unwanted, distracting, or inappropriate gestures.
- As a meeting host you can:
  - » turn off someone's video if needed to block unwanted, distracting, or inappropriate gestures.
  - » mute participants if needed to block unwanted, distracting, or inappropriate noise.

- Suggest that participants rename themselves to whatever name they would like to be called during the workshop (as long as appropriate). Help participants do so, as needed.
- Leave the meeting last. This ensures that anyone who has questions can have a chance to approach you after the workshop is over.

Getting Ready for a Workshop

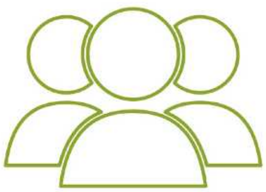
Virtual Workshop Preparation Tips

- Download the needed software or app (such as Zoom).
- Meet with the coordinator at your licensed organization to learn how to facilitate PATH using a virtual platform.
- Get comfortable with key features of the virtual platform that will be needed: audio, camera, viewing participants (e.g., speaker or gallery view), chat box for comments, closed captions, and screen share. In some platforms, there will may be other features to learn such as break-out groups or a white board.
- Ask if a technical support person will be available to assist with any technical needs that you or participants have.
- Review the basics of where icons and key features are located on different devices such as computer, laptop, tablet, and smart phone. This can help you know how to troubleshoot common participant virtual platform use questions.
- Review PATH Virtual leader manual and PowerPoint slides for the version of PATH you are facilitating.
- Ask if there are email templates for messaging participants before and after weekly sessions. Find out if you will be sending them or if another person at the organization will send the messages. Request copies of the emails.
- Schedule the workshop as a reoccurring meeting on the virtual platform (if you are setting it up) so that you can have the same link for the entirety of the workshop. This will cause less confusion for the workshop participants.

Getting Ready for a Workshop

Virtual Workshop Preparation Tips

- Confirm the process is for handling potential participant emergencies a virtual setting (e.g, participant falls while on video, indicates they will step away and be right back and doesn't come back).



- Confirm that there are enough people registered to hold the workshop. Ideal group size for virtual PATH is 8-12 participants. If at any time a workshop has less than 6 participants enrolled, the workshop could be cancelled.

Pre workshop: Planning for Session Zero

- Plan to hold a Session Zero approximately one week before the start of your workshop. It will typically last 30-60 minutes.
- One week before: email each person on your registration list to remind them of the workshop and briefly introduce yourself. Request that they reply by email to confirm enrollment.
- Three to five days before: call each person on the list that did not email you back. Confirm enrollment and verify their email address.
- One day before/day of: email all participants who confirmed with a link to the virtual session. Include a phone number for people to call if they have trouble logging in to the virtual session.
- Make sure you have the most up to date Session Zero PowerPoint and attendance list.

Getting to Know Your Participants - Session Zero and Paperwork

Session Zero

- Holding a Session Zero allows participants to practice logging-in, learn how to use key features of the online platform, receive a snapshot of the program content, ask general questions about the program, and learn about the registration paperwork.
- At the end of the session, show the participants the registration paperwork. For example, click on the link for the registration forms and do a "mock" participant registration while they are online with you. Share the link to the registration forms during the information session (e.g., type it in the chat box) as well as send it to participants afterwards in an email.
- Explain next steps, including some or all of the following:
    - » Complete program registration forms electronically using a secure website. A link to the forms will be emailed to participants within the next day.
    - » Participants will receive an email with link to session 1 that will come the day before or morning of the workshop. **Do not share the link with someone who is not registered.**
    - » Program materials will be mailed to participant's home address (unless your licensed organization has a different process for getting materials to participants).

Getting to Know Your Participants - Session Zero and Paperwork

Paperwork

- Participant paperwork is important.
- Participant registration forms must be completed by session 1 (unless otherwise indicated by your licensed organization).

- Some questions need to be answered. Most can be skipped. Required registration information may vary slightly by organization but will include: workshop ID, name/nickname or a participant ID code, age, zip code, release of information, consent for use of data, liability waiver, and emergency contact.
- It is essential to match the participant survey and evaluation form. If your form asks for first name and last initial, a participant can use a nickname (code name) as long as they make sure to use the same name on both forms. If your form asks for an ID code, make sure the same ID code is used on both forms.
- **Paraphrase for participants:** The registration information collected is standard information being asked of everyone who enrolls in this program. We use the anonymous, pooled responses from participant surveys to understand and report to our funders who we are reaching (ages, race/ethnicity, communities, etc.) and to gauge program success. Reporting this information allows us to keep offering this program at no-cost to participants. Most of the survey questions are optional, meaning you can skip them if you are uncomfortable providing us with that information. We follow strict rules and standard practices to protect your information and keep it private.

From Start to Finish

Between Session Zero and Session One

- Within one day after Session Zero, email all participants (regardless if they came to Session Zero) with a link to the registration paperwork. It is helpful to include an explanation that most of the questions are optional, with a few items being required.

- Confirm with your program coordinator about who completed their registration paperwork.
- Provide participants with program materials (book, workshop overview, welcome letter).
- One day before Session One, email participants who attended Session Zero and/or completed the registration paperwork with a link to Session One. You should **only** give the meeting link those who have completed registration for the workshop.
    - » If a participant has not completed registration, call them and ask if they have questions about completing it. You can resend the link to the survey. You can also offer to have them join Session One early to receive help.

Session One to Session Six

- Make sure everyone has program materials. Let your program coordinator know if someone says they did not receive it.
- Record attendance. This may be taken electronically or hardcopy. Make sure to send attendance updates to the program coordinator at your licensed organization weekly.
- Email participants within one day after each session with a post-session email. The email will include suggestions of things to focus on for the week. The email may include optional resources that are handouts or website links. This replaces the in-person "resource table."
- Email participants the day before or morning of the workshop with a reminder for the upcoming session. It is helpful to include a link to the workshop each time.

From Start to Finish

Session Six Closing

• At the end of session six, let participants know about the program evaluation form. Explain that an email will come to them following the workshop that will have a link to the evaluation. The evaluation is shorter than the registration form, but equally important to help measure program success and make improvements.

• **Suggestion:** If your online platform has a chat-box feature, include a link to the evaluation survey in the chat box. Do this at the very end of the program before you have everyone log-off. Let people know that they can click the link in the chat box and get to the evaluation right away.

After Workshop Details

There are a few logistical items to take care of once the workshop is done:

• Send final attendance to the program coordinator.

• Email participants with a link to the evaluation.

• Share participant testimonials that you receive with your licensed organization.

Helpful Handouts

The below handouts are suggested documents that you can share with people once they enroll in the virtual workshop.

1. Instructions for downloading and accessing virtual workshop through Zoom, Teams, GoToMeetings, or the online platform that you will use for the virtual sessions. There are several user-friendly documents available.
Ask your program coordinator which one they prefer.

2. General guidelines for participating in a group online format can support the information shared at the information session and guidelines established at session one. Ask your program coordinator if they have such a document available. It could include items such as:

    » Managing background noise

    » Proper camera position

    » Limiting distractions

    » Being on time

    » Not sharing the link with others

    » Suggestions for managing internet connection issues during a session

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