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Suggested citation:  
Daniel Friend, Mark Ezzo, Veronica Murphy Sotelo, Sheila Cavallo, Heather Gordon, Adilia McManus, Lauren Mattox, and Scott Baumgartner. **SIMR Practice Brief: Tips for Delivering Engaging Virtual Workshop Sessions in Healthy Marriage and Relationship Education Programs.** OPRE Report #2023-035, Washington, DC: Office of Planning, Research, and Evaluation, Administration for Children and Families, U.S. Department of Health and Human Services.

For more information about the Strengthening the Implementation of Marriage and Relationship Services project, please visit the project [web page](#).

## SIMR Practice Brief

# Tips for Delivering Engaging Virtual Workshop Sessions in Healthy Marriage and Relationship Education Programs

Virtual healthy marriage and relationship education (HMRE) workshops—in which participants attend workshop sessions online with other participants—have greatly expanded over the last several years. The COVID-19 pandemic temporarily shut down in-person HMRE programming, necessitating a swift shift to virtual workshops. But even before the onset of the pandemic, virtual HMRE programming was on the rise and showing promise.<sup>1</sup>

Virtual workshops are a flexible option for HMRE programs, giving participants the option of attending from home and without the costs of transportation and child care. The transition to and implementation of virtual workshops is not without its challenges for participants and program staff, however. Participant engagement might be an issue when programming is not in person.<sup>2</sup> For example, if participants with children are attending virtual workshops from their homes, this can create distractions that limit their focus on the content of the session if they need to stop and attend to their children's needs.<sup>3</sup> In addition, lack of reliable internet and other technology challenges might make it difficult for participants to access virtual workshops.<sup>4</sup>

Delivering high-quality virtual services also raises new challenges for HMRE practitioners.<sup>5</sup> Virtual services might require programs to consider and plan for how they will translate content and activities designed to be delivered in-person into a virtual format. Facilitators will also have to think through how they can use various approaches to facilitation and learning, and foster connections among participants over video or through chat on a digital platform. In addition, virtual program delivery requires HMRE facilitators and participants to skillfully use technology.

This brief presents four tips to help HMRE practitioners deliver more engaging virtual HMRE workshops. These tips are derived from work by program and project staff as part of the Strengthening the Implementation of Marriage and Relationship



services (SIMR) project. The strategies were tested through a rapid cycle learning approach with two HMRE grant recipients: Montefiore Medical Center and University of Denver. Both grant recipients were seasoned HMRE service providers that transitioned to virtual workshops in response to the COVID-19 pandemic. It is worth noting that these strategies are promising but not proven. To fit these strategies to their own program contexts, HMRE practitioners should test and refine any solutions through ongoing continuous quality improvement.

### ■ What is rapid cycle learning?

Grant recipients in SIMR tested strategies using a rapid cycle learning approach. Rapid cycle learning is a method for quickly and iteratively testing strategies to strengthen programming. It often involves piloting strategies in successive cycles, collecting feedback from staff and program participants on how these strategies are working, and gathering data to demonstrate whether the strategies are supporting improvement. Based on what grant recipients learn, staff can refine and test strategies again in a subsequent learning cycle.

### ■ About the grant recipients

**Montefiore Medical Center:** This organization operates in the Bronx borough of New York City and offers the Supporting Healthy Relationships (SHR) program to couples with low incomes who are raising children together. SHR offers a primary workshop that uses the Bringing Baby Home and PREP 8.0 curricula in 10 weekly, two-hour sessions. SHR also offers individualized case management and employment services. The program offers services in Spanish and English. SHR has been funded by the Administration for Children and Families (ACF) since 2006. Because of the pandemic, the grant recipient was forced to transition its long-standing, evidence-based program from an in-person to virtual format. Montefiore Medical Center now plans to offer SHR in both formats.

**University of Denver:** This organization offers an HMRE program, called MotherWise, to women ages 14–24 who are pregnant or parenting. MotherWise offers a primary workshop that uses the Within My Reach curriculum in six weekly, four-hour sessions. MotherWise also offers individualized case management and supplemental services focused on infant care and parenting. The program offers services in Spanish and English. MotherWise has been an ACF-funded HMRE program since 2015. In the same way that the pandemic affected Montefiore Medical Center, the pandemic forced the University of Denver to transition its evidence-based program from an in-person to virtual format. The University of Denver now plans to offer MotherWise in both formats.

### ■ What is SIMR?

Strengthening the Implementation of Marriage and Relationship Programs (SIMR) is a national evaluation overseen by the Office of Planning, Research, and Evaluation within the Administration for Children and Families (ACF) with funding from ACF's Office of Family Assistance. It aims to strengthen the capacity of OFA-funded healthy marriage and relationship education (HMRE) grant recipients to improve their programs by addressing implementation challenges in three core areas:

- 1. Recruitment.** Challenges related to identifying and communicating with potential participants, as well as enrolling them in the program.
- 2. Retention.** Challenges with initial and sustained participation in program services.
- 3. Content engagement.** Challenges related to sustaining participants' interest and attention during activities and services.

For the SIMR project, Mathematica and its partner, Public Strategies, collaborated with 10 HMRE grant recipients (5 that serve adults and 5 that serve youth) to conduct iterative, rapid cycle testing aimed at strengthening grant recipients' services. These grant recipients are funded by the Administration Children and Families, Office of Family Assistance from 2020–2025. Through this work, the team cocreated, tested, and refined promising strategies to address recruitment, retention, and content engagement challenges. The study had two main goals: (1) to improve the service delivery of grant recipients in the study and (2) to develop lessons for the broader HMRE field about promising practices for addressing common implementation challenges.

For more information about SIMR, see the study's [project page on the OPRE website](#).

<sup>1</sup> Duncan et al. 2009; Megale 2022; Spencer and Anderson 2021

<sup>2</sup> Barden et al. 2021; Bodenlos et al. 2021; Turner et al. 2022

<sup>3</sup> For example, Davis et al. 2022; Theall et al. 2022

<sup>4</sup> Waters et al. 2021

<sup>5</sup> Barden et al. 2021; Bodenlos et al. 2021

## Tip 1. Train facilitators on virtual delivery



Even the best facilitators can struggle with the switch to facilitating virtual workshops. Facilitators might find it difficult to develop online relationships with participants, manage time in the virtual environment, and translate curriculum materials and activities from an in-person to a virtual format.<sup>6</sup> In SIMR, the project team developed a training—based on guidance and best practices from the field<sup>7</sup>—to help Montefiore facilitators overcome some of these initial challenges. Findings from SIMR show that facilitators at Montefiore gained skills following the training and used them in subsequent workshops.

HMRE practitioners who wish to offer virtual services might want to begin with a training on virtual service delivery for facilitators and staff who support virtual workshops similar to the one used in SIMR. This training can help facilitators build their confidence. It can also enable staff to identify their own barriers and concerns related to virtual workshop facilitation and generate strategies to potentially address them. Programs should consider adding the following components to their training:



▶ **Understanding and addressing common computer and internet issues.**

Programs might find that moving to virtual workshops requires facilitators to become more familiar with resolving issues with their personal computers. Consider beginning the training by helping facilitators understand their own computer and Wi-Fi settings. Programs could also cover best practices for managing the technology aspects of facilitating a virtual workshop. For example, facilitators should place webcams at eye level, test microphones and webcams before the workshop begins, and consider using hardwiring to the internet instead of using wireless to help ensure the stability of their internet connection. The training could include tips for troubleshooting issues with participants' technology.



▶ **Diving into the features of the virtual platform with a hands-on learning lab.**

Facilitators might not be well versed in the features of Zoom, Microsoft Teams, or other virtual platforms used to host workshop sessions. Consider devoting a substantial part of the training to reviewing the platform and how to use various features to support facilitation. This segment of the training could cover screen-sharing options, virtual backgrounds, breakout rooms, and polling. Programs might also find it helpful to have dedicated time devoted to a learning lab in which small groups of facilitators can practice using features with one another. Working in small groups enables facilitators to practice without participants present and get help from their peers.



▶ **Developing virtual relationships with and among participants.** Facilitators might be very comfortable developing relationships in person but less comfortable doing this as part of an online workshop. For example, the art of small talk before beginning a session might feel more natural to a facilitator when interacting with participants in person. Consider adding elements to the training that focus on the differences between virtual and in-person HMRE workshops, and how facilitators might make and nurture connections when they do not share physical space with their participants. Some of the strategies might include using the chat as a mechanism for relationship building, building in more intentional time for peer-to-peer discussion, using social media or texting outside of the session, and being thoughtful about how

<sup>6</sup> Bodenlos et al. 2021

<sup>7</sup> For example, Anderson and Derr 2020; Bodenlos et al. 2021; Yanez and Selekmán 2022

participants should be grouped when using breakout rooms. The training could include brainstorming sessions on best practices for connecting with participants during online workshops, during which facilitators share ideas about and successes using technology to foster relationships.



- ▶ **Translating in-person facilitation techniques to the virtual environment.** Virtual workshop sessions might involve more intentional planning to successfully translate facilitators' in-person skills to a virtual environment. Consider adding information to the training on how to engage in thoughtful planning and coordination before each session. For example, programs could create a worksheet for facilitators to use to define staff roles and responsibilities and set timing expectations for content and activities.<sup>8</sup> The training could also cover how to build group agreements among workshop participants to foster a sense of community and set common expectations for behavior in the virtual environment. The training could include a brainstorming session on translating in-person facilitation skills to an online workshop—for example, how to deal with late or disruptive participants in the virtual classroom.

## Tip 2. Prepare participants to troubleshoot technology issues



In virtual workshops, facilitators might feel like they have to wear multiple hats during workshops—playing the role of facilitator and technology expert who troubleshoots participants' challenges.<sup>9</sup> This dual role might disrupt the flow of the session and make time management more difficult. HMRE practitioners can proactively address potential technology challenges to enable participants to arrive on time, be present, and fully participate in workshop sessions.

To help participants manage technology issues, programs could develop a guide similar to the one developed for Montefiore during the SIMR project (Appendix A). To develop this guide, programs can review the help page of their preferred virtual meeting platform and consult technology specialists at their organization. The guide could provide the following information for participants:

- ▶ **Joining virtual sessions.** The guide should describe how to create an account with the virtual meeting platform and how to log into the virtual workshop sessions using the platform.
- ▶ **Setting up for success when attending virtual workshops.** The guide should describe how participants can set up their environments to be engaged in the workshop session. This content would cover topics such as having a distraction-free space and knowing when to mute and use their camera.
- ▶ **Describing the virtual platform's features.** The guide should describe how to use the various tools provided in the platform, such as the chat feature, breakout rooms, and polls.
- ▶ **Dealing with technology issues.** The guide should describe how participants can troubleshoot common computer and internet issues. This content would cover topics such as checking to ensure the correct microphone is selected and resetting the internet router if there are connectivity issues.

After programs have developed the guide, they should give participants a copy and review it with them before the first session. In addition, programs might consider emailing participants another copy just before the first virtual workshop.

<sup>8</sup> Buonasina et al. 2023

<sup>9</sup> Barden et al. 2021; Bodenlos et al. 2021

### Tip 3. Encourage flexible camera use



The pandemic forced many to be on camera more than ever before. This can lead to Zoom fatigue<sup>10</sup>—an experience in which participants might be exhausted by being on camera and less engaged in the virtual workshop sessions. In addition, some participants might not feel comfortable showing their homes as

backgrounds or might have unstable internet connections that do not allow for consistent video.<sup>11</sup>

To help encourage camera use, facilitators might consider adopting a strategy that empowers participants to be in control of when they are on camera. In SIMR, MotherWise found success implementing an intentional camera use strategy called, “Now You See Me, Now You Don’t”—a strategy developed by HMRE practitioners to fight the fatigue of virtual meetings and promote video engagement.

The goal of this strategy is to get participants comfortable using their cameras when sharing information or participating in discussion, and empowering participants to turn off their camera when engaged in other activities. This kind of flexibility about when to use the camera can encourage overall camera use while helping create a safe and supportive environment. The activity can also serve as a good icebreaker in early workshops.

### Tip 4. Deliver the content in a way that helps manage time while keeping participants engaged



Things that happened quickly in person can take longer in a virtual setting. For example, convening a small group activity in person could take a matter of seconds.

However, in a virtual environment, that same small group activity would likely involve creating and sorting participants into breakout rooms and relies on participants understanding how to enter and leave those virtual rooms efficiently. These minutes add up, and facilitators often struggle to get through all the content they need to cover. In addition, as noted above, Zoom fatigue and in-home distractions can make engagement in workshop sessions challenging. Because of these issues, facilitators of virtual HMRE workshops might need to take a close look at their curriculum and how they can streamline their presentation of content for the virtual environment. This might mean focusing on the most essential material and the core concepts from their curriculum. At the same time, facilitators need to think about how to ensure their presentation of this content is as engaging as possible, given the challenges posed by the virtual environment.

#### ■ Implementing “Now You See Me, Now You Don’t” in a virtual workshop

The purpose of this activity is to engage participants in a game that requires them to turn their web camera on and off to answer specific questions.

- Participants begin by turning off their cameras.
- The facilitator asks a simple yes-or-no question, such as “Who watched the big game last night?” or “Did your baby wake you up last night?”
- Participants turn their cameras on when the answer to the question is yes. Participants leave their cameras off (or turn them off if they are on) if the answer to the question is no.
- The facilitator should plan to ask four or five questions as part of the activity and aim to ask questions that will have all participants answer yes at least once.

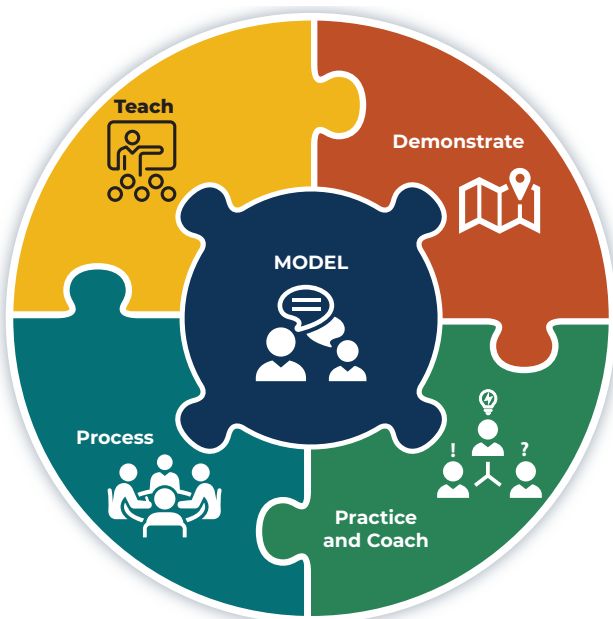
<sup>10</sup> Fosslien and Duffy 2020

<sup>11</sup> Waters et al. 2021

In SIMR, the project team and Montefiore staff developed a process to streamline and facilitate virtual workshops in an engaging way dubbed, “Teach, Demonstrate, Practice/Coach, Process, Model,” and it was guided by principles on how adults learn.<sup>12</sup> Other programs wishing to adopt this process should start by working with curriculum developers to identify core concepts that should be taught in each lesson. With those core concepts clarified, practitioners can identify any content that is supplemental to the core concepts for each lesson. This supplemental content can be marked optional and covered only if there is time. This optional material might be good content to use in bonus or booster sessions. These first two steps will help facilitators manage time in the virtual workshops by focusing only on the essentials. After this exercise is complete, facilitators can apply the “Teach, Demonstrate, Practice/Coach, Process, Model” framework to plan engaging lessons for their virtual workshops. Figure 1 shows the framework developed through the learning cycle. The framework has the following steps:

1. **Teach.** Facilitators first need to identify how they will introduce and explain the concept. For example, facilitators might use a video to introduce a concept and after showing the video, provide brief instruction on the concept. To help manage time and promote engagement, facilitators should spend the least amount of time on this step—aiming to give participants the basics of what they need to understand (for example, why something is being taught and how it is beneficial).
2. **Demonstrate.** Next, facilitators should identify how they will show participants how to apply the content to their daily lives. For example, facilitators might role-play using a skill (showing correct or incorrect use). Alternatively, if the video they are using to teach the concept includes demonstrations of people using or applying it, facilitators can rely on those prerecorded demonstrations at this step. Adult learning theory suggests that facilitators should spend more time demonstrating than teaching. Participants are likely to be more engaged by a demonstration of a skill than basic instruction on it.
3. **Practice and coach.** Facilitators should then identify how they will have participants practice using the content during the session and how they will support them using it. For example, facilitators might have couples practice a skill with each other in a breakout room or use breakout rooms to have participants engage in small group discussions. Regardless of the format, participants should be well supported by facilitators while practicing, to ensure they stay on track and correctly apply the content. Facilitators should spend the most time practicing and coaching. Adult learners will likely be most engaged by practicing the skills taught to them. Facilitators can encourage sustained engagement by supporting or coaching participants while they practice the skills.
4. **Process.** Facilitators should then identify how they will solidify the content taught by connecting it to the lives and experiences of the participants. For example, facilitators might engage participants in a large group discussion after a practice session to further apply the content to participants’ lives. Facilitators should also spend time processing the content and the experience practicing the skills with the participants as a group. In addition to better connecting the content to their lives, this step is where participants will have the chance to engage with and learn from one another—deepening friendships and building interest in future workshop content.

**Figure 1. Teach-Demonstrate-Practice & Coach-Process model curriculum framework**



<sup>12</sup> Alamillo and Person 2021; Merriam 2008; Merriam and Bierema 2014

- 5. Model.** To demonstrate how to apply and reinforce the content, facilitators and other staff should use the core concepts covered by the curriculum to guide their interactions with other program staff and participants. Having program staff model the communication and relationship skills taught by the program will help participants better understand how to use the skills and appreciate their value.

## Considerations

This brief provides several strategies that HMRE or other practitioners might consider implementing to develop or enhance their facilitation of online workshops. Although these strategies are evidence informed, they were developed for specific HMRE programs (Montefiore and the University of Denver) in their specific contexts. Other programs that plan to use them should think carefully about the needs and challenges of their service populations and staff, and adapt their virtual service delivery strategies as necessary. Involving staff in developing these strategies will likely be important to getting them on board with implementing them.

HMRE practitioners can find more information about the SIMR study and findings from other SIMR sites in the interim and final reports for the study, as well as through additional practitioner guides. These resources are available on the [Office of Planning, Research, and Evaluation SIMR web page](#).

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**Title: SIMR Practice Brief: Tips for Delivering Engaging Virtual Workshop Sessions in Healthy Marriage and Relationship Education Programs**

**OPRE Report 2023-035**

**February 2023**

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**Suggested citation:** Daniel Friend, Mark Ezzo, Veronica Murphy Sotelo, Sheila Cavallo, Heather Gordon, Adilia McManus, Lauren Mattox, and Scott Baumgartner. **SIMR Practice Brief: Tips for Delivering Engaging Virtual Workshop Sessions in Healthy Marriage and Relationship Education Programs**. OPRE Report #2023-035, Washington, DC: Office of Planning, Research, and Evaluation, Administration for Children and Families, U.S. Department of Health and Human Services.

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## **Appendix: Participant Technology Guide**

# Tips for Attending Virtual Workshops

Welcome to Montefiore's Supporting Healthy Relationships and HERO Dads virtual workshops!

We are so excited to have you join us! This guide will help set you up for success to join the workshops online using Zoom.

## Create a free Zoom account!

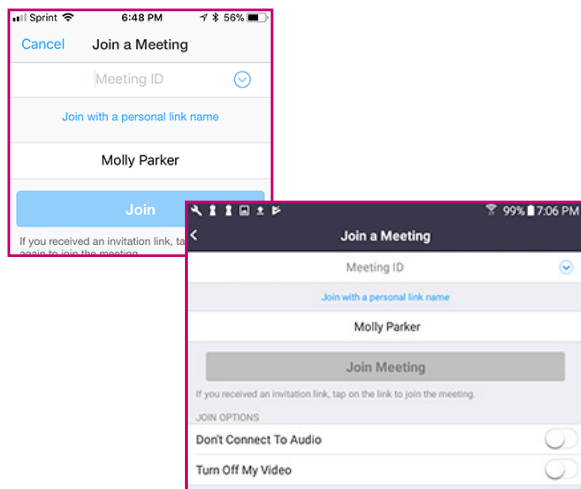
1. You will need Zoom to join the virtual workshops. Create a Zoom account at <https://zoom.us/signup>.
2. You will need an **active email address** to create your Zoom account, or you can sign up using your Google or Facebook account information.

## What do I need to join? Just two things!


1. **A device** (laptop, tablet, or smartphone) with the Zoom app downloaded. It's best to use a laptop or tablet if you have one. We don't want you to use up your cell data.
2. **An Internet connection:** A strong connection to the internet will give you the best experience. Lower internet speeds mean you will not be able to see your coach and others in the workshop. If you are having internet connection issues:
  - Sit as close as possible to the router. Move your router if needed.
  - Unplug and re-plug in the router if the internet isn't working.
  - If you have Internet issues, Montefiore might be able to help. Check with your coach about joining the virtual workshop at Montefiore.

## Now the exciting part, joining the workshop using Zoom!

1. Click the join link in your email invitation from your coach. The link stays the same throughout the program.
2. You might be prompted to enter a display name as you enter. Please list your first name and include your partner's first name if you are joining together. The display name field is where "Molly Parker" appears in the screenshot below.
3. Make sure both options are **not** selected: "Don't connect to audio" and "Turn off my video." See the screenshot below.
4. Before your first workshop, try practicing Zoom using a test meeting at <https://zoom.us/test>.




## How to set yourself up for success

1. **Join on time, ready to participate.** Try to join the Zoom meeting a few minutes before the start time to make sure you can enter Zoom with no issues. Your coach will be there to help you if you run into any problems. We want to make sure you can fully participate from the start!
2. **Mute your microphone.** To keep background noise down, mute your microphone when you are not speaking. This helps everyone hear from one another and the coaches.
3. **Limit background noise.** When your microphone is not muted, avoid activities that could create additional noise, such as moving around the room or doing dishes. We want to be able to hear what you have to say! Also, be respectful of what others might be saying, too. If you're making too much noise, we can't hear them.
4. **Turn on your camera.** Position your webcam or smartphone camera at eye level so others can see you, especially when speaking. Try to sit near a light, such as a window or lamp. We can all better connect when we can see one another!
5. **Stepping away.** If you need to step away for a few minutes, such as to use the restroom, you can let the coach know by writing in the Chat . Turn off your camera, and leave your device where you are sitting (rather than taking it into the restroom). Turn your camera back on when you are ready, so your coach knows you are back with the group.
6. **Limit distractions.** Remember, you signed up for this program, and the workshops are time to focus on you and your relationship! Please set aside chores and distractions during the workshops. You can make it easier to focus by turning off notifications, closing running apps, and muting any other devices.

## How to solve some common Zoom issues


### Hide video to see class material larger

Text can be quite small when using Zoom on smartphones. If you are having trouble reading the class material, hide the video panel so you can see the text larger.

1. Click **More** in the meeting controls. 
2. Click **Hide Video Panel**.

### Audio issues

If you cannot hear others, try these steps:


1. Ensure your speaker is turned on. If you see the speaker icon in the top left corner is turned off, tap it to turn on your speaker. 
2. Turn up the volume on your device using the volume button. Even if the speaker is turned on in Zoom, your device's volume might be set to mute or vibrate only.
3. Click **Join Audio** if you haven't joined the meeting by audio. If you've already joined the meeting using computer audio, click **Switch to Phone Audio**. Click the **Call Me** tab. Click the drop-down to select the country code of your phone number (United States is 1). Enter your phone number, then click Call.
4. Try using earphones.
5. Restart your device.
6. Reinstall Zoom.

### Audio echo or feedback:

1. If you hear echoing or feedback, you might have two audio sources in the Zoom at the same time.
  - If both your computer and telephone are joined to Zoom audio, hang up the phone audio connection or disconnect computer audio by clicking the up arrow next to the microphone icon at the bottom left and choosing **Leave Computer Audio**.
2. Use only one device for audio in the same room. Two devices joined to audio near each other can cause echoing.

### Microphone issues









If others cannot hear you, try these steps:

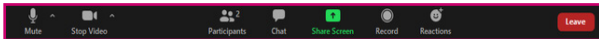
1. Make sure the microphone is not on mute. If you see the muted **Audio** icon in the meeting controls at bottom left, tap it to unmute yourself: If you are still muted, the host might have muted you upon entering the meeting. Ask to be unmuted by sending a chat message to the host.
1. Make sure you connected your device's audio. If you see the following **Join Audio**  icon in the meeting controls, tap it. Click the up arrow next to **Audio Settings** then **Switch to Phone Audio**.
2. If prompted, allow Zoom to access your microphone.
3. Try using earphones with a microphone.
4. Make sure Zoom has access to your device's microphone:
  - **iOS:** Go to **Settings > Privacy > Microphone** and switch on the button for Zoom.
  - **Android:** Go to **Settings > Apps & notifications > App permissions or Permission Manager > Microphone** and switch on the button for Zoom.
  - **Windows:** Enter "microphone" in the taskbar search box and select **Choose Which Apps Can Access Your Microphone** from the microphone privacy settings menu. Scroll down, and you'll see the list of Microsoft Store and desktop applications that are allowed to use your microphone.
  - For non-Microsoft Store apps, such as Zoom, make sure the button for **Allow Desktop Apps to Access Your Microphone** is switched to the on position.
5. Ensure that no other applications are using the microphone at the same time.
  - **iOS:** Double tap the "Home" button or swipe up and hold to view apps currently running. Swipe up to close other apps.
  - **Android:** Tap the multitask button (the square icon usually in the bottom right corner) to view apps currently running. Swipe left to close other apps.
6. Restart your device.
7. Reinstall Zoom.

## What to expect on Zoom

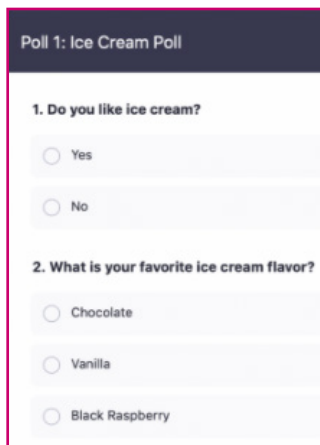
1. At the start of each workshop, a message will pop up saying the meeting is being recorded. This is for staff training purposes.

You will have options at the bottom of your screen:

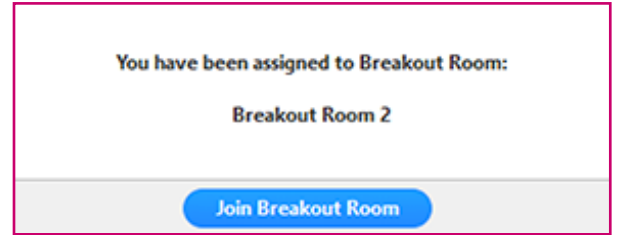
- **Join Audio**  to join the Zoom audio so you can hear others.
- **Unmute**  / **Mute** : Mute and unmute yourself.
- **Start Video**  / **Stop Video** : Turn your camera on or off.
- **Participants** : List of who is currently in the Zoom.
- **Chat** : Please use the chat if you are having trouble with Zoom or would like to message the group.
- **Reactions** : You can use reactions like emojis to give a thumbs-up when you agree or raise your hand with a question.



- **Polls:** During the workshop, coaches will sometimes ask questions using a poll. A box will pop up with a few questions and answers to choose from. Please select your answer(s), then hit **Submit**.



- **Breakout rooms:** Sometimes we will split into small groups to practice skills. A box will pop up asking you to join; when it does, please click on **Join Breakout Room**.



## App not working?

If the Zoom app doesn't work, you can use Zoom on your internet browser by copying the Zoom link into Chrome or Safari.

## Wi-Fi not working?

If you have unlimited cell data and a weak Wi-Fi connection, consider turning off your phone's Wi-Fi and using cell data. Or you could turn your phone into a hot spot to join the session. These options use cell data, so please make sure you have an unlimited data plan before using either option.

Please go to Zoom's help center for answers to frequently asked questions: <https://support.zoom.us/>.  
Email your coach if you need help with Zoom or have a question.