A Guide to Developing

Live Virtual Group Patient Education

Nine Steps to Success

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Authors

Rashmi Bhide, Senior Virtual Care Adoption Specialist, Virtual Care, Unity Health Toronto

Tedi Brash, Patient and Family Education Specialist – Consumer Health, Patient and Family Education, Unity Health Toronto

Melissa Yan, Patient Learning and Development Coordinator, Patient Education and Engagement, University Health Network

Acknowledgments

Farrah Schwartz, Manager, Patient Education and Engagement, University Health Network

Sonia Seto, Visual Communications Designer, Patient Education and Engagement, University Health Network

Sophia Wong, Capacity Building Coordinator, Patient Education and Engagement, University Health Network

Haifeng (Frank) Yu, Virtual Education Specialist, Digital Education, Unity Health

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Introduction

Developing and delivering virtual (online) education requires a unique set of skills. As we increasingly move towards this model of delivery, there will be exciting new opportunities and challenges to face. While many people are familiar with the basics of technology, both educators and participants will have varying levels of comfort using, teaching and learning within virtual platforms. This guide was created to provide the knowledge, tools and skills needed to ensure everyone has a positive learning experience.

Who is this guide for?

This guide is intended to help anyone who would like to plan for, create and deliver live interactive virtual group education to patients, families and community members at large. It will walk you through the process as it relates to small or large groups and a variety of audiences.

Why should I use it?

This guide was created in consultation with a wide range of experts including patients, clinicians, telemedicine experts and educators. It will help ensure your virtual group education reflect the needs of your audience, is well delivered, engaging and easy to access.

How do I use it?

This guide is divided into 9 steps. Apply these steps in an iterative process. It's important to revisit and reflect on the steps regularly to ensure you continue to meet the needs of your participants.

Each step has information and tips to help you:

1. Identify your audience

2. Meet your participants' needs

3. Choose a virtual platform

4. Create your content and structure

5. Schedule your virtual group education

6. Promote your virtual group education

7. Deliver your virtual group education

8. Follow-up with your participants

9. Evaluate your virtual group education

> You will see a blue **Action Items** box at the end of each step. The tasks and tools in this box will help you complete each step.
>
> For a complete checklist of all the Action Items, see Appendix IV.

Note: If you are new to offering virtual group education, we recommend you read the full guide before implementing any of the steps involved.

Interested in adapting this guide?

If you wish to adapt this guide, contact pfep@uhn.ca. We will provide you with the appropriate acknowledgement statements. We would also like to hear how you plan to adapt it. This will help us to improve the content as we continue to learn more about virtual patient education practices.

Share your feedback with us!

To help us continue to improve this work, fill out this short survey and share

your comments and suggestions. Your feedback will help us ensure the content is relevant, easy to use and aligns with current patient education and virtual care best practices.

Based on your feedback, we will continue to revise the guide to reflect up-to-date best practices. We recommend checking it regularly for new updates.

Who do I contact for more information?

Unity Health Toronto

- Email Digital Education at digital.education@unityhealth.to
- Email Patient & Family Education at patienteducation@unityhealth.to

University Health Network

- Contact the Patient Education & Engagement Program by email at pfep@uhn.ca or call 416 603 6290

Live Virtual Group Patient Education
9 steps to success

1 Identify your audience

Who do you want to reach and how comfortable are they with technology?

2 Meet their needs

What do they want to learn about and what do they already know?

3 Choose a platform

Is it supported by your organization, private, accessible, easy to use and interactive?

4 Create your content

Will it meet your goals, be engaging and easy to understand?

5 Schedule your session

Do the dates and times work for participants, facilitators and technical support teams?

6 Promote your session

What channels and strategies will you use to maximize attendance?

7 Deliver your session

How will you make it engaging, allow for reflection and summarize key points?

8 Include Follow-up

What avenues will you use to answer questions and distribute evaluation tools?

9 Evaluate your work

Which tools will you use to evaluate success and areas for improvement?

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Step 1: Identify your audience

As you start to plan your virtual group education session, ask yourself:

- **Who is my intended audience?**
  It is important to clearly define your audience right from the start as it will shape how you proceed through the steps.

  - If you intend to reach out to a specific group of people, they will have very focused interests, experiences and learning needs. They might include identified patients, caregivers, support groups or community organizations. They may have common characteristics such as a health condition, treatment type or experiences with their health care journey and challenges accessing care.

  - If you intend to have broad appeal, there will be diverse interests, experiences and learning needs. A broad audience could include community members or the public at large.

- **Do they have access to technology?**
  It will not be an effective use of your resources and time if technical barriers will prevent you from reaching your intended audience.

- **Do they want to learn virtually?**
  Don't assume everyone does. Preferences will vary. If virtual learning is new to your intended audience, you may wish to do a quick survey or discuss using virtual tools in person if possible, to ensure it will be embraced.

- **How comfortable will they be using virtual platforms and what support might they need?**
  Many patients are familiar with email and basic web searching but may need help using a computer, laptop, tablet, smartphone, webcam and microphone to attend education sessions.

Action items:

❑ Identify your intended audience.

❑ Establish your audience's interest and comfort with technology and virtual platforms.

Step 2: Meet your participants' needs

Your intended audience is more likely to attend your session if they feel the content is timely, relevant and addresses their specific wants and needs. To best engage your audience, find out what's most important to them.

Consider the following:

- **What do they want to know?**

  - For specific groups: are they interested in information about their health condition, treatment, transitions in care, overcoming barriers or lifestyle management? What clarifications, new knowledge or skills would they benefit from?
    Example: I have diabetes, is it safe to get the COVID-19 vaccine?

  - For a broad audience: what common or recurrent questions, concerns, or themes have you heard come up in the general population? What clarifications, new knowledge or skills would many people benefit from?
    Example: What can I do to keep safe during COVID-19?

  If you aren't sure what your intended audience might like to know, conduct a needs assessment with your participants, or ask your interprofessional teams what commonly asked questions patients have. If possible, you can also consult with your patient advisory councils or Patient/Caregiver Partners program.

- **What do they already know?**

  - For specific groups: What skills do they already have? Where are they currently on their health care journey? Are they newly diagnosed or have they been managing their condition for a long time?
    Example: Will this new drug "x" help my arthritis and how?

- – For broad audiences: What general information already exists? What myths or misconceptions might be important to address? What expertise can you, your team, program, or organization offer that isn't already available?
  Example: If I eat lots of calcium, will it prevent arthritis?

- **How can you optimize their virtual learning experience (and reduce any barriers to learning)?**
  What presentation style do they prefer? Is it lecture-based or more interactive? Is it important to see the speaker, the slides or both? Do they want to interact with others during the session?

- **Can you meet their learning needs using virtual group education?**
  Virtual group education may not be appropriate if the information you wish to cover is:

  - – highly technical

  - – involves multiple steps

  - – very specific to each individual

  - – requires a lot of coaching to be effectively implemented

  Example: How do I to set up my home hemodialysis machine?

  In these cases, virtual group education may be more appropriate after individual learning has taken place.

- **What languages do they prefer to learn in?**
  Do you plan to have interpretation available? Will it be simultaneous? What does this involve to do it well and how far in advance do you need to arrange this?

Action items:

- ❑ Consult with your intended audience to find out what they want to know, what they already know and how they would best like to learn in a virtual environment.

- ❑ Understand the needs of your audience. Consider their information and interpretation needs.

Step 3: Choose a virtual platform

It is important to consider your platform before you start to create any content. It may affect how you structure your session, what elements you build in and which interactive features you have available.

Check with your IT Department, Telehealth, Telemedicine or Virtual Care programs to find out what virtual platforms are supported by your organization.

Note: For any platform, you may need to obtain formal consent from patients for e-communications, advertising or to host your virtual group education session. Check with your privacy and communications teams if you are unsure.

If your organization doesn't have a preferred platform, consider your choices based on:

- **Privacy:** What level of personal protection does it provide? For health care organizations, any virtual platform must comply with both PHIPA (Personal Health Information Privacy Act, Ontario) and PIPEDA (Personal Information Protection and Electronic Documents Act, Canada).

> **Note to self:**
> Ensure the virtual platform complies with both PHIPA and PIPEDA.

- **Accessibility:** Does it offer features such as closed captioning, keyboard shortcuts and spotlighting or pinning videos?

- **Ease of use:** Is the interface intuitive and easy for participants, educators and facilitators to navigate? Will it require participants to create an account or can they join as a guest?

- **Access:** Can participants use the platform on a variety of devices, such

as computers, smartphones, and tablets? Is it available in the Google Play and Apple App stores?

- **Cost:** Does it offer different types of accounts? What are the costs (and features based on cost)? Are they recurring or one-time costs?

- **Capacity:** Does it have limits on number of attendees or session duration? This might affect both your content and how many participants you can invite.

- **Interactivity:** Does it have features like live chat, Q&A, share screen, ability to show both the speaker and slides simultaneously, reaction buttons, breakout rooms, and polling?

- **Facilitation options:** Can you adjust participants' camera and microphone access to ensure safety, sound quality and minimize unexpected interruptions?

- **Recording:** What options are available? Can you limit it's availability to a specific timeframe? What is the process for storage, retrieval, distribution, and deletion of your session?

- **Interpretation:** Is there an option to offer simultaneous interpretation? How does it work? Can it run multiple livestreams simultaneously?

- **Technical support:** What technical support can you access before and/or during the session? Is there someone within your organization who can help if you run into issues?

Action items:

❑ Find out if your organization has an IT Department, Telehealth, Telemedicine or Virtual Care program. If so, ask them:

  – which virtual platforms are available and supported

  – what support they can offer before and during your virtual group education session

  – what resources they can offer your participants to help them use and navigate the platform

❑ Identify your preferred platform based on privacy, accessibility, ease of use, access, cost and other features.

Step 4: Create your content and structure

Now that you know who your participants are, their needs and what virtual platforms are available to you, it's time to develop your content. The steps below will help walk you through the process.

A. Design your virtual group education (framework)

Consider:

- **How long do you want your virtual group education to be?**
Learning virtually can be hard for some people. Try to limit your virtual group education to less than 1 hour and include at least one break. If this will not be enough time, consider breaking your content into multiple sessions.

> **Note to self:**
> Try to keep the session under 1 hour to prevent virtual fatigue.

- **What teaching style do you want to use?**
Based on the feedback you received in Step 2, how do you intended to deliver your content? Will it be a lecture presentation or more interactive? Each of these will have timing considerations, interactive activities may take longer than you think.

- **How many participants will be involved?**
The group size can affect your ability to include interactive activities. The larger the group, the more complex it is to monitor and facilitate conversations. If your group will be large, you may want to look at what other tools you can use such as polls and reactions.

- **How will you check learning?**
When teaching, it is important to check-in with your participants to ensure learning and to allow time for questions and clarifications. What teaching methods will you use to do this? Are you going to make those

check-ins available through interactive tools, chat boxes or facilitated discussions?

- **What level of interactivity do you want?**
  If you plan to have participants interact with one another, consider:
    - your participants' comfort using technology
    - the time it will take both to run an activity and return from it
    - if you will need other people to help such as co-facilitators
    - how you will troubleshoot possible technical issues
    - your organization's privacy policies

  Smaller groups often allow for better interaction and engagement. If you are working with a small group or using breakout room features, consider starting with an icebreaker. This may help your participants become familiar with one another and feel more comfortable. Icebreakers are also a chance to practice using features like reactions, polling or how to turn on and off their mic.

- **Could you benefit from a co-facilitator?**
  This may help you focus on teaching. They can also monitor interactive components like chat functions and provide important back-up support if you experience technical problems.

- **Are you planning to offer simultaneous interpretation?**
  If so, you will need to deliver your presentation at a slower pace and allow for pauses so the interpreter can keep up with you.

- **Will your presentation be easy to view on a variety of screens?**
  People may be on a variety of screen sizes with various technical settings. Images or text may not appear as you had intended. For example, small text or complex images may be difficult for your participants to view.

B. Consider your goals

Now that you have a framework, you can begin to create your content. To ensure it is concise, relevant and relatable to your participants, consider:

- **What 2 to 3 key topics do you want to include?**
  Select the topics based on your audience (Step 1), identified needs (Step 2) and the information you want them to have.

- **What 2 to 3 key messages are most important for each topic?**
  Use these to help you create your learning objectives. Write them out using the following format: "By the end of the virtual group education, the participants will be able to…"

  For more information: Writing Learning Objectives (Boston University); Quick tips: Writing goals and learning objectives (University of Toronto)

- **What health practices do you want your audience to adopt or enhance?**
  Explain why these practices will benefit their health and overall well-being. Make sure they align with what your interprofessional clinical teams endorses (Step 2). Include tips and resources that will help your audience adopt and maintain new practices.

- **What health behaviours do you want them to monitor or stop?**
  Tell them why and how this will benefit their health and overall well-being. Provide specific strategies and tools to help them succeed. Include tips and resources that outline small, attainable goals that support change.

- **How do you plan to make your content relatable?**
  People are often inspired by lived experiences and stories. If using real-life cases or videos, make sure they are current, relevant and likely to resonate with your intended audience (Steps 1 and 2). Consider inviting someone with lived experience to speak or co-facilitate your session.

If your organization has a Patient and Family Education program, contact them for advice on developing your goals. They have valuable insights and

tools.

C. Build your presentation

Most virtual platforms allow you to show presentation slides. These can be helpful for participants who prefer to see or read information as you speak. If using slides, make sure your presentation is easy to read on a variety of devices and is written in plain language. This will make it more accessible to everyone.

If you are creating slides:

- **Use a standardized, accessible slide template**
  If your organization has a branded template, use it. If not, check that your choice of font, colour combinations and background shading all meet accessibility standards by using a contrast checker.

> **Note to self:**
> Use a contrast checker to meet accessibility standards.

- **Include a series of introductory slides that have:**

    – Information on inclusion and equity and applicable land acknowledgments

    – Information about the presenters, such as their names, roles, and what program or the organization they represent

    – An overview of the session, such as when there will be breaks, what types of interactions to expect, how to ask questions, whether the session is being recorded, and if and how the recording can be viewed later

    – Ground rules and group norms (see example in Appendix I)

    – Learning objectives (what you will be covering; see Step 4B)

- **Design your slides so they:**

- Have a maximum of 6 to 8 bullets per slide

- Have just enough text to reinforce your message. It can be overwhelming for the participants to read and listen at the same time.

- Use a consistent font and ensure the size is large enough to read easily.

- Use a font that is easy to read. Do **not** use 𝔣𝔞𝔫𝔠𝔶 or 𝓼𝓬𝓻𝓲𝓹𝓽 lettering.

- Use bold font or a box to emphasize text instead of italics as this can be difficult for some people to read

- Use sentence case. Avoid all upper case text.

- Have lots of "white space" around your text and images. This allows your participants to easily read and understand what they are seeing.

- **Repeat and summarize main points throughout your slides**
This is important to enhance learning and give participants time to reflect on the content you have presented.

- **Add placeholders for interactive segments**
This could include polls or voting buttons, quizzes, annotation, chat boxes, reactions, and direct participant interaction through microphone and video.

- **Incorporate concluding slides**
Provide recommended resources, your contact information and any follow up activities that will be distributed (such as feedback surveys).

- **Use images ONLY when relevant to your topic**
If you include images, make sure they represent your content, your audience and their communities effectively. Also check that you have copyright permission and properly acknowledge them.

For more information: [How to use (or Not Use) Stock Photos](#) (CommunicateHealth)

- **Use graphs and charts ONLY if they help explain the information**
  Make sure they are simple and easy to read. Summarize the take-away or findings as they may not be easy to interpret without direction.

- **Avoid or minimize the use of live animations**
  They can be distracting for facilitators and learners.

D. Incorporate evaluation tools

As you design your presentation, think about how you will evaluate it and what feedback you would like. A strong evaluation plan will allow you to collect meaningful data about your session, gauge its success and help improve it in the future. This will also help when you evaluate virtual group education more globally ([Step 9](#)).

If you choose to collect data, remember to ask others to review your survey questions for clarity and personally test the feedback tool before delivering your session. Also, ask others to test to make sure it is easy to use.

Some things to consider as you create your evaluation questions are:

- **How will you measure if you met the goals for the session?**
  Use the learning objectives you developed in [Step 4B](#) to create your questions. See sample questions in [Appendix II](#).

- **What else do you want feedback on?**
  Feedback on content, length, format, and relevance may all be useful. Your colleagues and leadership may also suggest other evaluation measures. For example, getting feedback on the education impact can inform future content and funding proposals.

- **What survey tools are available to you?**
  You may have access to survey tools through your chosen platform. If using external applications, read their privacy guidelines for data storage. If the external survey tool can't be safely incorporated into

your chosen virtual platform, you will need to plan for other methods of distribution.

For more information: [Zoom Polling for Meetings](#); See sample tool in [Appendix II](#)

- **How will you keep responses anonymous if polling during the virtual group education session?**
  It's important that participants feel at ease when responding to feedback surveys.

Action items:

❑ Decide on the length, format and flow of your session.

❑ Consult your organization's Patient and Family Education program for guidance on how to create effective content and learning objectives.

❑ Find out if your organization has standardized slide templates.

❑ Design your presentation so it addresses 2 to 3 topics, with 2 to 3 key messages per topic.

❑ Make sure your slides are clear, concise, easy to read and visually appealing.

❑ Incorporate evaluation and feedback measures into your session.

Step 5: Schedule your virtual group education

Whether you are planning one session, a series, or are going to repeat the same session over a period of time, try to maximize the opportunities your intended participants have to attend.

When you are figuring out the best date and time, consult your participants and co-facilitators and ask:

- Are there days of the week that tend to work better for my participants?

- Are there certain times during the day that work better based on their health condition?
  Example: If you are presenting to patients with diabetes, is it wise to schedule sessions during mealtimes?

- Do they have any competing priorities that may prevent them from attending?
  Example: Do participants work, have certain treatments such as dialysis, or attend other classes on a regular basis?

- When are my co-presenters or co-facilitators available?

- When do I have access to the virtual platform I plan to use?

- When do I have access to any technical support (people) I may need to help me run the session?

Note: If you plan to record your session for future viewing and there is a chance that your participants' names or pictures might be visible, you must consider their privacy and confidentiality by:

- Ensuring all the appropriate permission forms are completed before the session to avoid delays in posting it afterwards

- Informing your participants before and during the session where they

can find the recording and how long it will be available for

- Restating at the beginning of your session that it is being recorded and that their voice and video may be captured. Do this both verbally and through platform features that require them to acknowledge the recording in order to be admitted to the session.

Action items:

❑ Find dates and times that work best for participants, facilitators and technical support teams.

❑ Contact your manager or organization's privacy department to determine what communication, participation and and/or video recording consent forms must be filled out.

Step 6: Promote your virtual group education

To develop an effective communication and promotion plan, it is important to identify who your intended audience is and how best to reach them.

Develop your promotion strategy based on:

- Whether your intended audience is specific or broad ([Step 1](#))

- Existing channels you already use to reach your intended audience

- Other communication channels that might be effective. Your organization's Communications or Public Affairs team may have ideas, input and access to social media channels if your intended audience is broad.

- Your virtual platform's attendance limits (the number of participants that can join at once)

- The maximum and ideal number of participants for your session to be both educational and interactive
  Example: To see all the participants on the screen at once, this may mean limiting your numbers to 4-6 people.

- Your invitation process
  Example: Some virtual platform allow you to send out invitations, you can create a separate invitation or you can do both.
  Note: Consider privacy implications if you are sending invitations electronically. Check with your Privacy and Telehealth/Telemedicine/Virtual Care teams to determine what permissions you need to send invitations electronically.

- Your registration process
  Asking participants to register in advance can help you track numbers, verify access to and comfort with available technology (for specific participants), identify interests, capture contact information for future

follow-up and control who has access to the session.

A. Create promotional materials

If you plan to design flyers and/or invitations to advertise your virtual group education, use patient education best practices (Step 4) to ensure it:

- Is written in everyday (plain) language

- Uses fonts that are clear, easy to read and avoid all caps

- Includes only the necessary details

- Has lots of "white space" around your text and images

- Includes images only if they are clear, help describe your session and represent your intended audience. If posting online, add Alternative Text (Alt-Text) to these images so screen readers can explain them.

  For more information: Alternative Text (WebAim)

When creating promotional material, include the following details:

- Title, date, time and name of the platform you will be using
  Example: This session will be held online using Zoom on May 13, 2021 at 3:00 pm

- Topics you will cover (include the learning objectives created in Step 4B).
  Example: By the end of the session, you will be able to…

- Information about your presenters (qualifications, affiliations and role)

- Instructions on how to register for the virtual group education

- Who to contact for more information

B. Compile an information package

This will give your participants the opportunity to submit permission forms, familiarize themselves with the content, the virtual platform and any apps they may be using. Send this information far in advance of your session.

Your information package could include:

- **Consent form(s) to participate in the virtual group education**
  This is different from the email consent form. This form would include information about privacy and confidentiality during the virtual group education. It can be either paper or downloadable / fillable PDF formats, depending on how you are sending out the package.

  Note: Check with your privacy department regarding which consent form(s) you will need to conduct your session. You may need additional consent forms if names, images or other identifying elements will be seen and/or personal information will be collected during the session. Participants must fill out and return to these forms prior to your session.

- **The date, time and link to join**
  Encourage participants to join early so they can test their audio and video connection.

- **A list of equipment they will need**
  Include tip sheets on how to set up the equipment and how to access the virtual meeting.

- **Instructions (links or guides) on how to:**

  – Download/use software or sign in to a network

  – Access the virtual group education from different devices on the day of the event

  – Use any interactive elements
  Examples: Menti, Quick Access or QR codes, external trivia platforms like Kahoot

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- – Ensure privacy during the session
  Example: How to change their background or change how their name is displayed on the screen

- **Group norms and expectations** (see example in [Appendix I](#))

- **Video conferencing best practice guidelines**

- **Other information**
  Example: A summary of the sessions goals and objectives, speaker information, slides and other reference materials

C. Spread the word!

There are many ways you can promote your virtual group education. These will vary depending on your intended audience.

For specific intended audiences, work with your clinical teams and program areas to:

- Distribute or email (if you have consent to do so) printable and electronic promotional materials

- Advertise in treatment or clinical areas, waiting rooms and common areas

- Contact patients in specific program areas (if you have consent to do so)

- Inform other relevant healthcare providers, managers, educators and leads

- Promote in patient newsletters, e-blasts or other established communication channels. Set up a series of reminder emails using the contact lists (if you have consent to do so).

For broad intended audiences, you may want to:

- Contact community and relevant health organizations

- Contact healthcare providers, managers, educators and leads within and outside of your organization

- Post to internal and public social media channels. Ask your Public Affairs or Communications teams for help

- Contact partner organizations who may have a shared interest

- Promote through recognized and credible e-mailing lists

- Submit the details of your session to teams who create newsletters
Example: Your organization's Foundation, Public Affairs, Communications department and Family Health Teams

- Set up a series of reminder emails or posts for internal and external stakeholders, intended audiences (if you have consent to do so), and through social media channels

Action items:

❑ Establish which communication channels and social media outlets you can use to reach your intended audience.

❑ Build a plan to advertise and invite attendees.

❑ Create an information package for participants to be sent upon registration or prior to the session.

❑ Work with clinical teams, patient care areas, community partners and others to raise awareness and attract participants.

❑ Promote your session using all channels available to you.

Step 7: Deliver your virtual group education

Practice your session in the days leading up to your event to ensure everything runs smoothly. Familiarize yourself with the virtual platform, its features and how to effectively use them. Also check your location (setup, background, lighting), computer audio and video quality.

15 to 30 minutes before your event:

Allow yourself and other speakers to set up, troubleshoot technical issues and quickly run through the presentation. To help make sure everything goes smoothly:

- **Check your space**

    - Lighting: Present in a well-lit room with a table lamp in front of you. Avoid having any bright lights or windows behind you as this will make it harder for participants to see you.

    - Computer placement: Use a stable surface and position your camera at eye-level to make natural eye contact with participants

    - Video: Make sure your entire face can be seen at all times

    - Background noises and distractions: Choose a quiet room with limited background noise where no one else will enter. Turn off your phone ringer.

    - Automatic notifications on your computer: Turn off notifications and any other programs not being used to limit distractions.

    - Privacy: make sure very few personal belongings are in view. Some platforms allow you to change or blur your background.

- **Confirm your co-facilitator's tasks**
  Your co-facilitator can help you in many ways. For example, they can help:

- Manage participants as they enter
  Example: Ensuring they are on mute, admitting them from the waiting room, and verifying their identity

- Take attendance or track the number of participants

- Monitor the chat and question-and-answer screens

- Troubleshoot technical issues

- Act as a back-up in case you experience technical difficulties. You may also want to discuss how and when to communicate privately with one another throughout the session.

- **Ensure privacy and security**
  For closed virtual group education, consider turning on the "waiting room" function or use a passcode so that only intended participants are admitted.

As you start your session:

Go through the content you developed in Step 4C and:

- Introduce yourself, any co-facilitators, your roles, and consider including a Land Acknowledgment as well.

- Review the group norms, expected etiquette and session format. Consider having your participants practice using the virtual platform features that you plan to use during the virtual group education, such as the mute, question-and-answer and chat functions.

During your session:

- Engage your participants (if it is a goal)

- Ask questions and give your participants adequate time to respond.

Remember, there is an audio delay so sometimes the Q&A, chat box or other polling features might be more useful.

- Make it relatable. Speak in plain language. Use everyday words.

- Build in extra time. This will allow you to keep an easy pace, address participant questions and engage in discussions. It also gives you a buffer in case of any unexpected interruptions like technical issues.

- Speak at a slower pace. If there will be simultaneous interpretation, pause for 1 to 2 seconds between each sentence to allow interpreters to "catch up" if needed.

- Check-in with your participants throughout to see how they are doing and to identify if anything needs clarification

- Summarize and repeat key messages periodically

- Include breaks. Tell participants how long the break will be and state the time you will start up again.

- Use interactive features wisely and remember to address the privacy considerations when using any of these tools. The chat, question-and-answer screen, and reaction icons can engage people in different ways. Spread activities throughout the session to help avoid screen fatigue and maintain engagement.

As your session closes:

- Summarize and provide next steps

    - Review your learning objectives

    - Provide contact information for further information, any outstanding questions and comments

    - Provide additional resources (if applicable)

    - Send an evaluation form to your participants via the chat box or by displaying the form's QR code for them to scan, **or** let your

participants know that an evaluation form will be emailed to them

- Explain how their feedback will be used to improve future sessions

Once participants have logged off:

- Debrief with presenters / facilitators

  - Discuss what went well and what could be improved upon

  - Explain that you will be sending an evaluation form to them and discuss how their feedback will be used to improve future sessions

  - Commit to providing a summary once all the feedback has been captured

Action items:

❑ Log on 15 to 30 minutes before starting. Check your environment and test the technology. If you will have co-facilitators, discuss roles, privacy and session flow.

❑ Introduce speakers.

❑ Discuss etiquette, expectations and learning objectives.

❑ Go slow and engage with your audience.

❑ Use interactive tools wisely.

❑ Summarize key learnings, answer questions, suggest further resources and explain how to provide feedback.

❑ Debrief with presenters/co-facilitators. Discuss successes and improvement strategies.
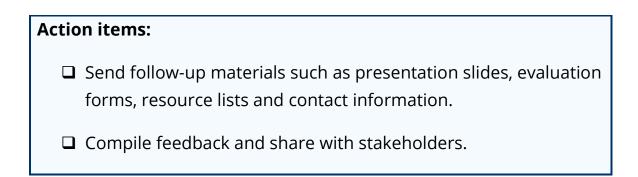
Step 8: Follow up with your participants

Immediately after your virtual group education:

- Send follow-up materials to your participants such as:

  - A link to the recording. Ask the participants not to share the link if it is a private recording. You may also wish to put a time limit on access (such as 1 month)

  - A copy of the slides (PDF format)

  - A resource list. Try to hyperlink the resources if possible.

  - A reminder to fill out the evaluation form. Reinforce whether their responses will be anonymous and give a "complete by" date.

  - Contact information for questions or additional support

- Follow-up with your speakers and provide:

  - A link to the recording

  - An evaluation form. Ask them about their experience presenting, the support they received and suggestions for future sessions (see sample questions in Appendix III).

In the weeks following:

Collect and compile all the feedback including formal surveys, informal conversations or comments from your interprofessional team. Share this with your facilitators, speakers and co-presenters.

Action items:

- ❑ Send follow-up materials such as presentation slides, evaluation forms, resource lists and contact information.

- ❑ Compile feedback and share with stakeholders.

Step 9: Evaluate your virtual group education

This step is different from Step 8, where the focus was on general feedback.

This step takes a closer look at critical measures and performance in key areas. It is meant to evaluate how closely your virtual group education met its goals, how engaged your participants felt and how you can improve overall. This information can be used to support future projects or secure funding.

When evaluating your virtual group education:

- **Review and analyze the feedback collected to determine:**
    - If your virtual group education met its stated learning objectives
    - Whether participants enjoyed the session and/or found it helpful
    - If speakers/co-facilitators enjoyed presenting and/or saw the value
    - What improvements are needed
    - What participants would like to learn more about
    - Which speakers and facilitators were engaging or effective

- **Reflect on your own experience:**
    - What did you enjoy about presenting and/or planning your virtual group education?
    - Did you get the number of participants you had hoped for? If more or less, what were the contributing factors?
    - Was it easy for your participants to use the virtual platform? What ways could you improved access in the future?
    - Did the technology meet your needs in terms of scheduling, presentation options, and/or interactivity? Where were the gaps?

- Was your session timed well or did you feel rushed?

- Were there any distractions or obstacles you would like to avoid in the future?

- Were there any technical issues or elements that did not work as intended? How can you follow up to ensure this doesn't happen again?

- Did participants engage with your planned interactive elements? Were they effective in reinforcing key messages or providing support?

- How responsive were your participants? Did they participate in breakout rooms, chat, Q&A, polling features?

Action items:

❏ Create a spreadsheet or database to help record and track the feedback.

❏ Evaluate success based on critical measurements and performance indicators. Analyze data for patterns or trends.

❏ Use feedback to revise your virtual group education and the processes surround it.

Concluding Thoughts

As mentioned at the beginning of this guide, developing virtual group education is an iterative process. Each time you deliver a session, you will learn from the experience and continue to improve. In the same way, this guide will continue to change, adapt and improve to meet the needs of both presenters and participants alike.

As you move forward, use this guide as needed to assist you through key steps and action items. Whether this is your 1st or 100th virtual group education session, it will help keep you on track. Revisit it often as a tool, reinforcement or reminder. It is here for you.

Additional resources

Learn to Teach Effective Live Online Courses

Continuing Professional Development, Temetry Faculty of Medicine:

- Video 1: [Introduction](#)
- Video 2: [Getting Started](#)
- Video 3: [Interactivity](#)
- Video 4: [Feedback](#)
- Video 5: [Social & Collaborative Learning](#)
- Video 6: [Reflection](#)
- Video 7: [Co-facilitation & Moderation](#)

Appendix I: Example of group norms

Collaboratively Learning Together

These guidelines will help ensure you and the other participants have a positive learning experience and get the most of the session:

- **Be punctual:** Please respect everyone's time and be on time and ready to start.
- **Listen to understand:** Allow others to finish speaking without being interrupted.
- **Give mutual respect:** Treat others as they wish to be treated, and how you would like to be treated.
- **Trust:** What is said in the session, stays in the session.
- **Share the airtime:** Allow others a chance to speak and share their thoughts and opinions. Wait until you are called upon to answer.
- **Be open-minded:** Step back and truly listen to understand someone else's experience or point of view.
- **Be daring:** Share your inspiration with others - it may be the most brilliant thing they ever heard!
- **Minimize distractions:** Turn off or silence your cellphone during the class. Avoid using your device for other purposes during the session.
- **Have fun!**

(Adapted from UHN Patient Partnerships' "Collaboratively Working Together" document)

Appendix II: Example of an online evaluation form for participants using Microsoft Teams

Virtual Health Talk Survey

Thank you for watching the Health Talk! Please share your feedback below to help us improve our sessions.

1. What was the topic of the Health Talk? *

   Enter your answer

2. How did you watch the presentation?

   ○ I watched it live online.

   ○ I watched the recording.

3. How did you learn about this presentation?
   You can choose more than one answer.

   ☐ Flyers in the UHN hospitals

   ☐ Flyers in a community organization

   ☐ UHN Intranet

   ☐ UHN website

   ☐ myUHN Patient Portal

   ☐ Social media (Twitter, Facebook)

   ☐ E-mails or Mailchimp newsletter

   ☐ From friends/relatives/colleagues

   ☐ From hospital staff

   ☐ Other

4. The following questions will help us understand how satisfied you were with the session, information and format. Please choose the answer that best reflects your experience:

	Very satisfied / A lot / Yes	Satisfied / Some / Somewhat	Not sure	Unsatisfied / Very little / Unlikely	Very unsatisfied / Nothing new / No
How satisfied were you with the session?	○	○	○	○	○
In this presentation, how much new information did you learn about this subject?	○	○	○	○	○
How satisfied were you with the language interpretation? (Please ignore this question if you did not use interpretation)	○	○	○	○	○
Will this information change the way you take care of yourself or your family member?	○	○	○	○	○
Did you find the resources useful?	○	○	○	○	○
How satisfied were you with the livestream or recording quality?	○	○	○	○	○
How satisfied were you with the question-and-answer format (Slido)?	○	○	○	○	○
Did you find the QR codes helpful and easy to use?	○	○	○	○	○

5. Hearing the patient or caregiver story inspired me to:

You can choose more than one answer.

☐ Learn more about my condition

☐ Ask questions to my health care provider

☐ Find resources in the community

☐ Make positive changes in my life

☐ Follow advice of my health care provider

☐ Did not inspire me

☐ Other

6. What part of the session did you find most helpful?

Enter your answer

7. What suggestions do you have to improve this session?

Enter your answer

8. Please suggest any presentation topics for future sessions:

Enter your answer

Appendix III: Example of an online evaluation form for presenters using SurveyMonkey.com

Virtual Health Talk Speakers Feedback - 2020-2021

Thank you very much for collaborating with the UHN Patient Education and Engagement Program, and presenting at our Health Talk. We would like to understand your experience, hear your feedback and welcome your suggestions for improvement.

It will only take 2 minutes to complete this survey. Thank you for your input.

1. Did you find the tips on the plain language helpful?

◯ Yes, they are helpful

◯ Some are helpful

◯ Not that helpful

2. How satisfied are you with the Support from staff during the planning stage?

◯ Very satisfied   ◯ Not satisfied

◯ Satisfied   ◯ Very unsatisfied

◯ Neutal

3. How satisfied are you with the Attendance of the talk?

◯ Very satisfied   ◯ Not satisfied

◯ Satisfied   ◯ Very unsatisfied

◯ Neutral

4. How satisfied are you with the Organization of the talk?

◯ Very satisfied   ◯ Not satisfied

◯ Satisfied   ◯ Very unsatisfied

◯ Neutral

(Continues on next page)

5. How satisfied are you with the Question and Answer Period?

◯ Very satisfied   ◯ Not satisfied

◯ Satisfied   ◯ Very satisfied

◯ Neutral

6. Would you recommend other colleagues to present at a Health Talk?

◯ Yes

◯ Maybe

◯ No

7. If you answered Yes to the previous question, who would you recommend?

8. Do you have any other comments or suggestions?

Done

Appendix IV: Complete list of Action Items

Step 1: Identify your audience

❑ Identify your intended audience.

❑ Establish your audience's interest and comfort with technology and virtual platforms.

Step 2: Meet your participants' needs

❑ Consult with your intended audience to find out what they want to know, what they already know and how they would best learn in a virtual environment.

❑ Understand the needs of your audience. Consider both the information to be presented and the need for interpreters.

Step 3: Choose a virtual platform

❑ Find out if your organization has an IT Department, Telehealth, Telemedicine or Virtual Care program. If so, ask them:

– which virtual platforms are available and supported

– what support they can offer you before and during your virtual group education session

– what resources they can offer your participants to help them use and navigate the platform

❑ Identify your preferred platform based on privacy, accessibility, ease of use, access, cost and other features.

Step 4: Create your content and structure

❑ Decide on the length, format and flow of your session.

❑ Consult your organization's Patient & Family Education program for guidance on how to create effective content and learning objectives.

❑ Find out if your organization has standardized slide templates.

❑ Design your presentation so it addresses 2-3 topics, with 2 to 3 key messages per topic.

❑ Make sure your slides are clear, concise, easy to read and visually appealing.

❑ Incorporate evaluation and feedback measures into your session.

Step 5: Schedule your virtual group education

❑ Find dates and times that work best for your participants, facilitators and technical support teams.

❑ Contact your manager or privacy department to determine what communication, participation and/or video recording consent forms must be filled out.

Step 6: Promote your virtual group education

❑ Establish which communication channels and social media outlets you can use to reach your intended audience.

❑ Build a plan to advertise and invite attendees.

❑ Create an information package for participants to be sent prior to session (possibly upon registration).

❑ Work with clinical teams, patient care areas, community partners and others to raise awareness and attract participants.

❑ Promote your session using all channels available to you.

Step 7: Deliver your virtual group education

❑ Log on 15- 30 minutes prior to starting. Test your environment and the technology. If using facilitators, discuss roles, privacy and session flow.

❑ Introduce speakers.

❑ Discuss etiquette, expectations and learning objectives.

❑ Go slow and engage with your audience.

❑ Use interactive tools wisely.

❑ Summarize key learnings, answer questions, suggest further resources and explain how to provide feedback.

❑ Debrief with presenters/co-facilitators. Discuss successes and improvement strategies.

Step 8: Follow up with your participants

❑ Send follow-up materials such as presentation slides, evaluation forms, resource lists and contact information.

❑ Compile feedback and share with stakeholders

Step 9: Evaluate your virtual group education

❑ Create a spreadsheet or database to help record and track the

feedback.

❑ Evaluate success based on critical measurements and performance indicators. Analyze data for patterns or trends.

❑ Use feedback to revise your virtual group education and the processes surround it.