

## Remote Workshop Planning and Implementation Guide

### 1. Work with partner organizations to gather names to add to outreach list

#### *Ongoing*

- a. Send out flyers so that partner organizations can gather names/numbers of potential participants on their own and then send that list of interested people to your organization for outreach calls
- b. Send out flyers with your organization's contact information so partner organizations can distribute to their clients/residents/listservs and potential participants can make contact if they are interested in programming
  - i. Monitor the phone number and email address provided on flyers to receive inquiries, undertake registration, and add to interest lists for each type of online program
- c. Maintain the California Healthier Living website so that it accurately reflects ongoing and upcoming workshops

### 2. Establish workshop schedules, assign facilitators and moderators

#### *Ongoing – on a rolling basis as needed*

- a. Online CDSME: 2 facilitators + 1 moderator
- b. Telephonic CDSME: 1 facilitator + 1 moderator
- c. Online exercise, including Bingocize: 1 facilitator + 1 moderator

### 3. Conduct outreach calls and registration

#### *Ongoing, or a minimum of 3 weeks in advance of the workshop start date*

- a. Use script for outreach calls to indicate interest in each workshop and tech capacity (i.e. do they have an internet-connected device?)
  - i. Each individual receives no more than 3 call attempts before their case will be "closed" to further outreach; Can go back to these lists after 2 months to see if interest has changed
- b. Register individuals for existing workshops that have openings by asking a series of questions to gather relevant information (i.e. mailing address, availability)
- c. When registration for a workshop is closed, pull relevant information (name, phone number, address, workshop type, workshop group, etc.) to use for workshop purposes such as mailing materials, emergency contact information, creating an attendance log, etc.

### 4. Order materials

#### *2 weeks in advance of workshop start date*

- a. Online or telephonic Chronic Disease Self-Management Education (CDSME): Send list of names, mailing addresses, and order information to Emily Sewell ([emily@bullpub.com](mailto:emily@bullpub.com)) at Bull Publishing (for CDSME) to get materials mailed to registrants at least 2 weeks in advance



- b. Online Bingocize: Secure 60 or more prizes to use throughout Bingocize workshop that can be mailed to participants on a weekly basis

**5. Undertake Survey Data Collection Calls – use scripts as needed to introduce survey to each participant.**

*2 weeks in advance of the workshop start date*

- a. Online and Telephonic CDSME: Staff member completes survey on behalf of participant while on the phone with them
  - i. Online CDSME: Client Intake Survey + Pre-Program ACL CDSME Survey
  - ii. Telephonic CDSME: Client Intake Survey + Pre-Program ACL CDSME Survey
- b. Online exercise, including Bingocize: Staff member shares survey link with participant and stays on the phone with them while they complete the survey. Exercise program surveys should include a required *exercise waiver* that participants should read and check box for signature before submitting.
  - i. Client Intake Survey + Exercise waiver + Pre-Program Survey

**6. Undertake Setup Calls – use scripts unique to each program to set up participants on the device they will need to use to join the workshops**

*1 week in advance of workshop start date*

- a. Online CDSME: Zoom\*
- b. Telephonic CDSME: Uber Conference (Or other HIPAA compliant telephone platform)
- c. Online Bingocize: Zoom\* + Bingocize website
- d. Other online exercise: Zoom\*

\*(Or other HIPAA compliant video conferencing platform)

**7. Implement workshop**

- a. Facilitator responsibilities: take attendance and facilitate as prescribed in program manuals or scripts
- b. Moderator responsibilities: troubleshoot tech problems and call out to participants who do not join on time
- c. Online Bingocize: Mail prizes on a weekly basis by coordinating with donors/sellers

**8. Undertake Post-Program Calls**

*1 week after workshop ends*

- a. Use scripts unique to each program to complete a post-program survey with participants. All program types have 1 post-program survey that will be completed by staff members who were not the facilitator or moderator of that workshop.