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The National Resource Center for Engaging Older Adults

IMPLEMENTING AND EXPANDING VIRTUAL PROGRAMMING FOR OLDER ADULTS

Tips and Practical Strategies for Aging Network Organizations

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IMPLEMENTING AND EXPANDING VIRTUAL PROGRAMMING FOR OLDER ADULTS

Tips and Practical Strategies for Aging Network Organizations

Introduction

During the COVID-19 pandemic, virtual programming became a necessity for just about everyone, including older adults. Organizations serving older adults had little time to react to the new reality of physical distancing required by the pandemic but quickly adapted their programs, including social engagement opportunities, to be delivered virtually. Since the initial days of panic and confusion, much time, effort and resources have been directed to make virtual programs as effective, enjoyable and fulfilling as those in-person programs for which they were intended to substitute. These investments, the duration of the pandemic and some of the perceived advantages mean that virtual programming will be with us for the foreseeable future. Even as the world resumes in-person activities, virtual options will likely continue to be used to reach and engage older adults.

This manual, developed through a partnership with Older Adults Technology Services (OATS) from AARP, can help organizations serving older adults implement new virtual programming or enhance virtual programming put into place in response to the pandemic. The following pages offer guidance to navigate the exciting world of virtual programming.

OATS helps older adults learn to use and leverage technology to transform their lives and their communities. Through its flagship program, **Senior Planet** (**seniorplanet.org**), OATS works closely with older adults to create extraordinary experiences in person and online. As one of AARP's charitable affiliates, the mission of OATS is "to harness the power of technology to change the way we age." Along with its role on the Project Advisory Committee for engAGED: The National Resource Center for Engaging Older Adults, OATS also serves as the engAGED subcontracted technology partner. As part of its work with engAGED, OATS authored this manual based upon its extensive experiences with Senior Planet.

General Considerations

When deciding to adapt existing programs to a virtual format or to launch or expand virtual programming, the single most important aspect is preparation. Few in-person programs translate into great virtual experiences without any adjustments. Similarly, few virtual programs are successful without adequate preparation.

The first question you should answer is which video conferencing platform to use. One popular platform is Zoom, which includes options to hold both meetings and webinars. The meeting option is designed for more interactive, collaborative sessions while the webinar option works best for large audiences or public events where attendees may not need to interact with one another. Zoom meeting is the preferred option of Senior Planet for a number of reasons and is the option this manual will focus on.

In addition to video quality and robust, yet easy-to-use, features, the convenience of tapping a link or entering a Meeting ID and password, without having to download software, gave Zoom a real advantage in the early days of the pandemic—and made it a favorite among users. Additionally, Zoom's security features along with ongoing updates and new features such as closed captioning, continue to make Zoom a good choice for Senior Planet and many organizations. Using Zoom for virtual programming and incorporating "How to Use Zoom" events, opens a world of possibilities for older adults since so many religious, cultural and civic organizations use the platform.

Once you've decided on a platform, here are some questions to keep in mind when expanding virtual programming:

- Are staff and participants familiar with the chosen platform (e.g., Zoom, WebEx, Microsoft Teams, Google Meet, GoToMeeting, etc.)?
- Do (additional) materials need to be created to accommodate the virtual nature of the program or to supplement any elements that aren't possible to replicate virtually?
- How will you provide feedback or coaching, if necessary?
- What aspects of the program (in person and virtual) will your participants find most engaging?
- Do presenters have enough time to prepare?
- How will you foster interaction and engagement throughout the session?

Organizational Planning for Virtual Programs

Once your organization has made the decision to implement or expand virtual programming, there are several steps you can take to ensure the success of these programs.

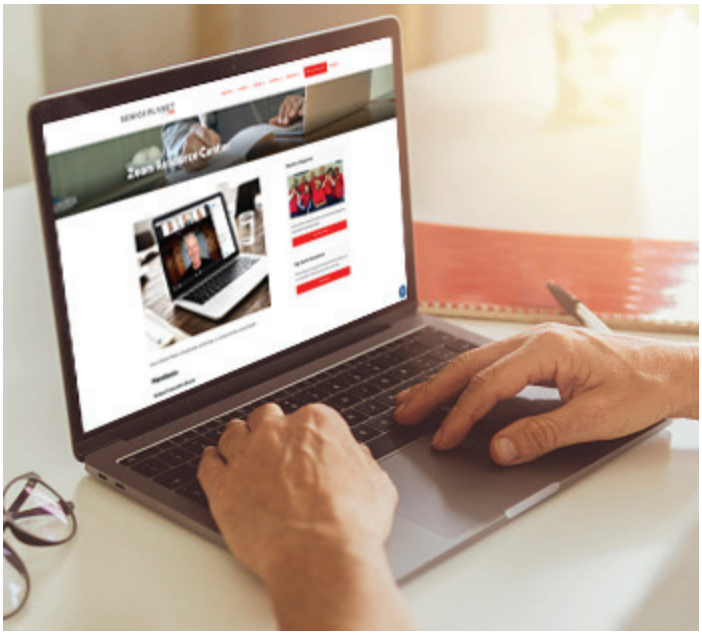
Virtual programs require more attention and focus, which directly impact the amount of staff time, agency resources and program development needed for implementation. Staff involved in hosting or helping with virtual sessions should have access to the technology and platforms that will be used and should practice using the technology on a regular basis and before events.

If your organization is new to virtual programming, it is recommended to staff each session with at least two co-presenters. The primary presenter is responsible for delivering the content, while the other presenter will manage the chat and all the extra tasks that come with this delivery model. Whether your organization is adapting an in-person program to deliver it virtually or creating a new program, plan for activities to take longer than they would in an in-person setting. Program content may need to be reduced compared to what you would normally present at an in-person event.

Outreach and Promotion
Like any in-person program, outreach and promotion are important factors to success. Use as many avenues of outreach as possible, from flyers to social media posts to e-newsletters to phone calls. Senior Planet has found that it is helpful to highlight program instructors or facilitators in the program name. Many people attend events, both in person and online, because of the instructor, so *Morning Stretch with Cas* is a more effective name than just *Morning Stretch*.

When conducting outreach for your programming, offer support and resources to older adult participants who may be less familiar with technology. Senior Planet offers free resources on using Zoom, which you can access at **www.seniorplanet.org/zoom**. For first-time video chat users, one-on-one help over the phone is recommended. All older adults are welcome to call the Senior Planet technology hotline with tech questions at (888) 713-3495, from 9:00 am to 8:00 pm ET, Monday through Friday.

If the community you serve includes people who will be calling in by phone, using screen readers for visual impairments or using Video Relay Services for sign language interpretation, adjust your programming accordingly to ensure a positive user experience for all.



Tracking Attendance
An important detail for many organizations is attendance. Establish procedures in advance for tracking attendance since video chat platforms do not always have a way to collect that information automatically. If program materials will be used, send those to participants in advance. When you send program materials, you can also remind participants about the session link or meeting ID.

If your program requires advance registration, be prepared for a higher drop-off rate than you may see for in-person programs. Once someone is familiar with a video chat platform, the ease with which they can drop in and out of events can increase the numbers of no-shows. Increasing outreach and raising registration limits can help mitigate attrition. Plan to send reminders (preferably by phone, but also by email) to reduce the drop-off rate.

Evaluation
To successfully evaluate programs, set up systems for both staff and participant feedback. Creating a short survey for participants to complete either at the beginning or end of a program provides staff with useful information about what is and is not working. Because virtual sessions often require a more limited focus or scope than an in-person session of the same type, feedback from participants helps identify the most engaging aspect of a program for future focus and delivery. Schedule debriefing sessions for staff to discuss how the program and preparations went and what changes may need to be made before the next event.

Best Practices for Presenting Virtual Programs

We asked Senior Planet trainers for their top tips for a successful virtual program. Below are their recommendations:

1. Be patient
2. Slow down
3. Be yourself
4. Be prepared
5. Prioritize face-to-face interaction
6. Review Zoom controls for participants
7. Review Zoom controls for presenters
8. Manage expectations
9. Avoid reading verbatim from slides or script
10. Keep it positive, light and fun!

In the rest of this section, we'll expand on these top 10 tips by reviewing some of the essential steps for preparing for the session, as well as best practices that presenters and facilitators should keep in mind.

Before the session:

- Think about your audio and visual presence.
    - Set up your computer as close to the network router as possible for optimal connectivity and to minimize possible interruptions.
    - Ensure you are in a quiet place to reduce the possibility of background noise.
    - Test your audio using a headset.
    - Have a good lighting source (natural is best, if possible) in front of you, not behind you.
    - Set your camera at about eye level. Place your laptop on a stack of books to do this.
    - Think about what is visible in the camera and aim for a clean, uncluttered background.
    - Log on early to test audio and video.
- Make sure your materials and examples are ready to use and accessible.
    - Share your materials with participants in advance. Consider using tools like **Microsoft's Accessibility Checker** to help determine if your materials are accessible.
    - Only have open the materials that you plan to use for the session (especially if screensharing!) and practice screensharing in advance.
    - Prepare interactive features like polls or videos ahead of time.
    - To assist those who use screen readers for visual impairments, you may wish to designate one person to receive all chats directly and have that person read the chats at a selected time.
- Have a back-up plan. For example, if you're planning to share a video as part of the session, have an alternative in case glitches in technology occur.

At the start of the session:

- Introduce yourself and give time for participants to introduce themselves.
- Review main platform features, including accessibility features, to help ensure that all participants, including those with disabilities, are able to get the most out of your session.
- Review audio options. It's essential that all participants are connected to their audio so that they can hear and be heard.
- Share instructions for how video and phone users can mute and unmute themselves.
- Establish norms. Ask that participants joining by phone or with video turned off identify themselves by name when speaking.
- Make clear what features participants will be asked to use.
- Review the session's structure and goals and explain how participants can ask questions, access the chat and/or access any other materials shared during the session.

During the session:

- Model virtual platform etiquette, such as one person speaking at a time and, in large groups, muting yourself when you are not speaking.
- Encourage participants to identify themselves before speaking so all participants, including those with visual impairments or those who are on the phone, know who is speaking.

- Describe visual content when sharing your screen to help ensure that those with visual impairments or those on the phone have a similar experience.
- Remember to stop sharing your screen throughout the session to allow for face-to-face interaction, especially during discussion or when the slide or visual is not necessary.
- Check in frequently with participants—visually, verbally and via chat for reactions.

Following these tips should encourage audience engagement. Maintaining a positive, fun and light environment during virtual programs goes a long way to help participants feel comfortable with sharing. Participants are often eager to share their experiences and opinions. However, if a discussion falls flat, it's a good idea for the presenter to have discussion prompts or a relevant personal story to jumpstart a discussion. Sometimes people feel more comfortable sharing in smaller groups, so using breakout rooms to create smaller groups for participant discussion can be very useful. When participants return to the main Zoom room, one or two participants per group can share what was discussed.

Zoom-Specific Best Practices

During the COVID-19 pandemic, Zoom very quickly became a household name and a lifeline, especially for older adults. The platform has many features that help enhance the quality of the virtual programming experience. Below is a list of the features deemed most useful, as well as some real-world examples of how Senior Planet has implemented Zoom in its virtual programming.

- **Video:** Encourage participants to turn on their video. The ability to see others' faces enriches the virtual experience, more closely mimics the in-person experience and allows for more social engagement. When ideas are exchanged among participants or a presenter is giving instructions, the ability to see the facial reactions of participants is very helpful.

  Tip: For fitness and dance lessons, plan to use multiple cameras to demonstrate movements that aren't visible with your computer's camera. Use the Spotlight feature in Zoom to spotlight a camera focused on your feet in dance class!

- **Waiting room:** Enabling the waiting room feature in Zoom meetings allows the host to admit participants. It also allows the host to decide when to start the meeting, rather than participants arriving before the host, and gives the host the ability to remove an unwanted guest or an unruly participant.

- **Mute participants on entry:** Muting participants when they enter the Zoom room ensures that any background noises or conversations will not be picked up by the mics on participants' computers. For those using screen readers, this helps minimize excess noise. Zoom meeting settings include an option to automatically mute all participants when they join the meeting.

  Tip: Be ready to explain how attendees can unmute themselves so they can participate when ready, whether they're on a mobile device or using a computer.

- **Rename:** Make sure participants know how to rename themselves, so that everyone can be easily identified. Zoom often defaults to the device name if a participant is new to Zoom or has never signed up for an account and always joins as a guest via the link. Once everyone's name is visible, the presenter and participants alike can address each other by name. Having names on the screen also makes taking attendance easier if that is a program requirement.

  Tip: Imagine a class where everyone is called "LG Tablet!" It is more common than you think. This example illustrates the necessity of asking participants to use the rename feature.

- **Disable screen sharing:** By disabling the ability to screen share in Zoom meeting settings, you can eliminate the possibility that a participant may accidentally share their screen and/or disrupt the presentation. Even when you disable screensharing, you can selectively give attendees permission to share their screens.

- **Polls:** Using polls during a Zoom event is a good way to solicit quick, non-verbal feedback from your audience. Polls also present good opportunities for engagement in large groups.

  Tip: While the chat feature is a great option for engagement in smaller groups, in larger groups it can be impossible to keep up with the volume of chat messages. The polls feature allows for engagement even in Zoom webinars in which most attendees are off-camera and when the chat feature is turned off.

- **Breakout rooms:** Breakout rooms are available only in Zoom's meeting option and offer a great opportunity for an increased level of deeper engagement, such as individualized attention, hands-on practice or extra instruction.

  Tip: Senior Planet uses breakout rooms to allow the trainer time to help small groups with the hands-on portion of a lesson.

- **Chat:** Zoom's chat feature is a great way to encourage engagement. In an ideal situation, a presenter and co-presenter share responsibility for facilitating the Zoom session. In this scenario, the presenter assumes the responsibility for sharing session content and the co-presenter handles responding to questions and comments submitted via chat.

  Tip: For smaller groups, asking participants to answer discussion questions in the chat can also lead to an exchange of ideas. As an example, in the Senior Planet Virtual Activism lecture, participants shared websites for finding the contact information of elected officials.

- **Interactive features:** The Raise Hand and Reaction features offer more opportunities for engagement, especially in larger groups. These are non-verbal ways to check in with participants and make sure that questions are addressed.

  Tip: Use the Raise Hand feature to take a quick assessment of how a session is going. Ask participants to raise their hand if they're ready to move on to the next topic or activity, for example. Attendees can also give silent encouragement to each other through their use of the reactions.

- **Closed captioning:** Closed captions are subtitles that help participants follow the conversation, making your events more accessible. By enabling closed captioning, an assigned participant can type the captions or you can assign a third-party service to add closed captions. Or you may choose to enable auto-generated captions which uses artificial intelligence to type the captions. Keep in mind that closed captions typed by a person are often most accurate.

  Tip: Senior Planet enables auto-generated captions and begins meetings by explaining how to turn the closed captions on and off to ensure that participants can choose their preferred option. Participants can also move the closed caption textbox around on their screens.

- **Spotlight feature:** The Spotlight feature allows Zoom hosts to pin the speaker video so participants can see them, even if someone else interrupts. This feature can also be used to spotlight sign language interpreters.

  Tip: You can also pin multiple videos if you want more than one speaker to appear. For example, you can have the videos for both a speaker and a sign language interpreter pinned at the same time.

Conclusion

While organizations may have initially instituted virtual programming as an ad-hoc response to essential needs during the COVID-19 pandemic, it is now clear that many sectors, including the aging and social services sectors, the entertainment industry, educational institutions and more will continue to host virtual events. The shift to virtual programming has given rise to a hybrid format, which is loosely defined as some portion of programming being delivered to in-person attendees while others attend virtually. This hybrid format ensures the enduring need for virtual programming in one form or another.

As organizations look to the future and begin planning for the next several years, it is wise to embrace the necessity of virtual programming and the opportunities it presents. Using virtual methods helps ensure homebound older adults or those who are reluctant to attend in-person events can continue to remain engaged and receive benefits.

Appendix

For more tips on how to enable and use some of the Zoom features highlighted in this manual, see the chart below.

Steps to Take When Setting Up Meeting	Can Be Updated During Meeting?
Registration: By enabling registration when scheduling your Zoom meeting, you can capture participant information such as name and email and can customize different registration settings such as how registrants are approved and restrictions on number of registrants.	Registration must be enabled before the meeting.
Waiting room: Edit your Zoom meeting settings to ensure that all meetings have a waiting room enabled.	If you forget to select the waiting room option when setting up your meeting, as host you can still enable the waiting room at any time during the meeting.
Breakout rooms: Edit your Zoom meeting settings to enable the breakout room option. As host, you can pre-assign participants to breakout rooms when scheduling your meeting or create your breakout rooms during the meeting.	Breakout rooms must be enabled before the meeting starts.
Closed captioning: Edit your Zoom meeting settings to enable closed captions typed by the host or added by a participant or third-party service. Or you can use the auto-transcription option to provide live transcription.	Closed captioning must be enabled before the meeting starts. Participants then have the option to turn closed captions on at any point during the meeting.
Mute participants upon entry: You can enable this option within your Zoom meeting settings so all participants are automatically muted when they join a meeting.	During a meeting, you can enable or disable this setting at any time. As host, you can also individually mute participants.
Polls: Make sure the polls feature is enabled in your Zoom meeting settings. You will then have the ability to add single or multiple-choice poll questions when scheduling your meeting or during your meeting.	The polls feature must be enabled in Zoom meeting settings before the meeting starts, but you don't have to set up poll questions in advance of the meeting. You can also create polls during your live meeting.
Surveys: By enabling the meeting survey option within Zoom meeting settings, you can distribute a survey to participants after the meeting ends. You can add survey questions when scheduling your meeting using the Zoom survey option, which launches the survey questions after a meeting ends.	The survey feature must be enabled and survey questions must be created before the meeting starts.

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USAging

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USAging is the national association representing and supporting the network of Area Agencies on Aging and advocating for the Title VI Native American Aging Programs. Our members help older adults and people with disabilities and support caregivers throughout the United States live with optimal health, well-being, independence and dignity in their homes and communities.

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