



MANAGING A VIRTUAL CLASS

A resource to help Lifestyle Coaches deliver the National Diabetes Prevention Program lifestyle change program virtually.

NATIONAL
**DIABETES
PREVENTION**
PROGRAM

1/19/2022



Centers for Disease Control and Prevention
National Center for Chronic Disease Prevention and Health Promotion
Division of Diabetes Translation

Introduction

Virtual technology is increasingly being used to help us work, connect, and learn. It can also be used to help people make healthy lifestyle changes as part of the National Diabetes Prevention Program (National DPP) lifestyle change program. If you're an organization delivering this program, you may already be offering the required classes in a virtual format. If you're not, this guide can help you start.

This guide provides information and tips for choosing a virtual class platform and holding virtual classes. It is based on lessons learned from the Centers for Disease Control and Prevention (CDC) and CDC-recognized organizations that have delivered the lifestyle change program virtually. It also includes information on best practices and industry standards for leading a virtual class.

What Is a Virtual Class?

The National DPP lifestyle change program can be delivered in person, online, through distance learning, or through a combination of these methods. (See the Delivery Mode section of the CDC National DPP Diabetes Prevention Recognition Program Standards and Operating Procedures [[DPRP Standards](#)] for more information.) For online classes, participants can use computers, tablets, or smart phones to access course materials and interact with Lifestyle Coaches from any location. For distance learning, Lifestyle Coaches deliver classes live from one location, and participants call in or use videoconferencing to attend from another location.¹

Both online and distance learning classes use some form of virtual technology. Virtual classes give participants more flexibility and make your program more accessible to more people. If done correctly, they can promote social interaction even when people are not meeting in person. To make sure your classes are successful, start by picking the right platform for your organization and your audience.

How to Choose a Virtual Class Platform

Several technology platforms are available to help you run a virtual class—including videoconferencing tools, teleconferencing tools, and web-based services. Consider the following factors when choosing a platform:

- **Free vs Paid:** Do you have money to buy the necessary software or to buy a license to use the software? Or will you have to find free options?
- **Group Size:** Do you need a platform with capacity for a large group (over 100 people) or a small group (fewer than 25 people)?
- **Video vs Audio:** Should participants use video (videoconferencing) to get the information they need? Or would a dial-in phone line (teleconferencing) work?
- **Access:** Will your participants have to sign in with a computer, or can they access the class from a mobile device (like their cell phone or tablet)?
- **HIPAA Compliance:** Will the platform need to be compliant with the Healthcare Insurance Portability and Accountability Act ([HIPAA](#)) to ensure the privacy of participants' health information? Make sure before you choose a platform. If you are a supplier for the Medicare Diabetes Prevention Program, you must comply with HIPAA guidelines.
- **Accessibility:** Is the technology accessible to participants with hearing, vision, or other disabilities?

Here are some common tools you can use to conduct virtual classes:

Meeting Tool	Free vs Paid*	Group Size (max)	Video vs Audio	Access	HIPAA Compliant	Accessibility Features
Zoom	<ul style="list-style-type: none"> Free up to 40 minutes Paid starting at \$150 for a 1-year license 	<ul style="list-style-type: none"> Free: 100 people Paid: 1,000 people 	<ul style="list-style-type: none"> Free: Video Paid: Both 	Computer and mobile apps available	Yes	Yes
Skype	<ul style="list-style-type: none"> Free video Paid audio starting at \$36 a year 	100 people	Both	Browser, computer, and mobile apps available	Yes	Yes
Microsoft Teams	<ul style="list-style-type: none"> Free up to 60 minutes Paid starting at \$60 a year 	<ul style="list-style-type: none"> Free: 100 people Paid: 300 people 	Both	Browser, computer, and mobile apps available	Yes, depending on usage needs	Yes
Cisco WebEx	Free	100 people	Both	Computer and mobile apps available	Yes	Yes
GoTo Meeting	Paid starting at \$144 a year	150 people	Video	Computer and mobile apps available	Yes	No

*Prices are current as of December 3, 2021. See vendor websites for current pricing.

What Are Each Person's Roles and Responsibilities?

Once you choose a virtual class platform, make sure everyone involved in delivering your lifestyle change program understands their role in the process before classes start. Their roles and responsibilities may be different for a virtual class vs an in-person class. You will also need to make sure participants understand what is expected of them in a virtual format.

Class Administrator

The class administrator is also known as the Lifestyle Coach. This position covers the duties of three separate roles—manager, facilitator, and presenter. If your program has only one Lifestyle Coach, these roles can be performed by that person. However, your classes may go more smoothly if these roles can be filled by three separate Lifestyle Coaches. The following information assumes that a separate person will fill each role:

Manager

The manager serves as the primary point of contact for your classes. This person manages all logistics and preparation tasks to ensure that the classes are prepared to be facilitated smoothly and that participants are prepared. Specific duties include:

- Scheduling classes.
- Managing virtual class functions, such as screen sharing, screen control, chat room, question and answer sessions (Q&A), and video management.

- Managing participant engagement—for example, by using the “raise your hand” feature, polling feature, whiteboard or annotation tools, interactions or emojis, or breakout rooms.
- Recording the class (if applicable).
- Troubleshooting participant problems.
- Providing pre-class communications and post-class summaries.

Facilitator

The facilitator leads the discussion during classes and is the primary speaker. This person ensures that all content is covered, and all class objectives are met. Specific duties include:

- Leading discussions.
- Reviewing class materials.
- Moderating discussions.
- Providing instructions for class activities.

Presenter

The presenter manages any presentation materials (such as PowerPoint slides) related to the class lesson plan and takes notes. Specific duties include:

- Presenting class materials.
- Taking notes and collecting class records.

Participants

Some people who attend your lifestyle change program will have experience with virtual meeting technology, but others will have no experience and won't know what to expect. Let participants know that they will need to:

- Be prepared to meet class objectives.
- Participate actively by engaging in conversation and activities.
- Participate passively by listening and watching.

The next section provides more information on how to prepare your participants for virtual classes.

How to Prepare for Virtual Classes

Class preparation is important to ensure that you've identified clear objectives, expectations, and class outcomes and completed all technology troubleshooting. You can use an introductory class (also called Session Zero) to make sure your participants are prepared. You can also send them information in an email or through another preferred form of communication.

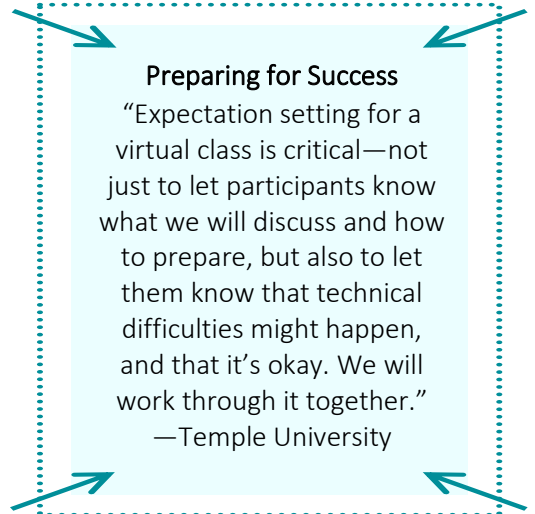
Here are specific actions you can take to prepare for a virtual class:

- **Determine Participant Capabilities:** Virtual class technology is typically associated with videoconferencing among a group. This format can help participants feel like they're in the same class. But some people can't use this technology because they don't have high-speed Internet, or they have other problems with access. Some may not understand the technology or want to be on camera. Make sure you understand your participants' limitations before you choose a virtual class platform, so you don't exclude anyone. Think about whether your class will require participant interaction, group work, or demonstrations of key points.

- **Develop a Class Agenda, Objectives, and Expectations:** Write an agenda to outline what will be covered in your program and then send it with the class invitation or in a separate email before the class starts.² You can use a CDC-approved curriculum to help you.³ Include clear objectives of what you hope to achieve in the class. Outline clear expectations for participants, including how they should behave and interact with each other. Be honest and direct so you can prevent disruptions. You can also discuss expectations with participants during a Session Zero. This information will help participants prepare, and it will reduce the time spent giving instructions during the class. Here are some examples:

- **Sample Agenda Item:** Introduction to Activity Tracking (5 minutes or 10:00 AM–10:05 AM).
- **Sample Objectives:** Discuss strategies for successful activity tracking.
- **Sample Expectations:** Participants are expected to turn on their cameras during the class and mute their microphones when they're not talking.

- **Tell Participants What They Need to Do Before the Class:** For example, they may need to read educational materials or do certain tasks—like filling out their activity tracker for the past week. You don't always need to send information in advance but doing so can provide background and create a foundation for success.
- **Send Class Reminders:** Remind participants about any materials they need to read or instructions they need to follow before the class begins.
- **Help Participants Use the Technology:** Some participants may struggle with virtual class technology, so be prepared to give extra help to those who need it. Send written instructions before the class. Let participants know if they'll need to download an application or use a password to log in. Help them perform these tasks if needed. Send instructions again in a reminder email just before the class begins so this information is handy. You can also offer instructional classes (group or one-on-one) before the class or demonstrate technology functions in a Session Zero. Taking these proactive steps can save time later. But expect to spend at least 5 minutes addressing technical problems at the start of the first class.⁴



Success Stories From Other Lifestyle Change Programs:

- *To train a group on a selected platform, State of Wellness, Inc., offered a "get acquainted with the virtual platform" meeting before their first class to review platform features with participants.*
- *To provide more individual support, Lifestyle Coaches in the Black Women’s Health Imperative met with participants one-on-one to help them work through technology issues before the first class. They called these informal meetings “Tech Checks.”*
- *Both approaches helped participants feel comfortable with the technology and made the virtual classes more effective.*

- **Create a Successful Virtual Class Environment:** Because many participants will join the class from a remote location (like their home, a public library, or a workplace), it's important to provide an appropriate class environment. If you share a video, make sure all images and language are suitable for the entire audience. Some classes may require physical activity or an interactive demonstration. For these classes, you may need to make adjustments to make sure participants can easily see the activity. For example:
 - **Location:** Shift your workspace, if needed, to create enough room for activity.
 - **Camera Position:** Set your camera angle to make sure participants can see your full face or the entire activity you are demonstrating.
 - **Lighting:** Add better lighting, if needed, so participants can see all activities clearly. You may need to buy special lighting.
 - **Sound:** Use microphones and headphones separate from your computer for better audio. You may need to buy special microphones and headphones.
 - **Visual:** Connect your computer to a monitor or TV so you can see participants better.
- **Anticipate What You Need to Facilitate the Class:** Planning what you need to conduct your class is critical to success. Before the class begins, decide on your strategy, and determine:
 - **Virtual Engagement Points:** Will the class require time for virtual whiteboarding? Will you need to conduct surveys or polls?
 - **Q&A:** Will there be a designated time for questions, or will participants be able to ask questions throughout the class? Will questions be limited only to the chat function?
- **Collect Participant Data:** CDC-approved curricula have several points where you must collect participant data to meet program requirements. Examples include participants' minutes of physical activity, weight measurements, food consumption, and blood sugar measurements (optional).
- **Troubleshoot Problems:** Before a virtual class, all participants should test the technology and make sure they're comfortable with its features. Be prepared to troubleshoot problems and answer participants' questions. Have a back-up plan in case the technology doesn't work correctly.

QUICK TIP

If the technology doesn't work as intended, you can take steps to make sure you can still provide your virtual class. You can set up a Wi-Fi hotspot in case your Internet connection is interrupted. You can provide dial-in information so participants can still hear the audio if the video connection is interrupted. You can also send presentational materials to participants before the class, so someone else can present the information if needed.

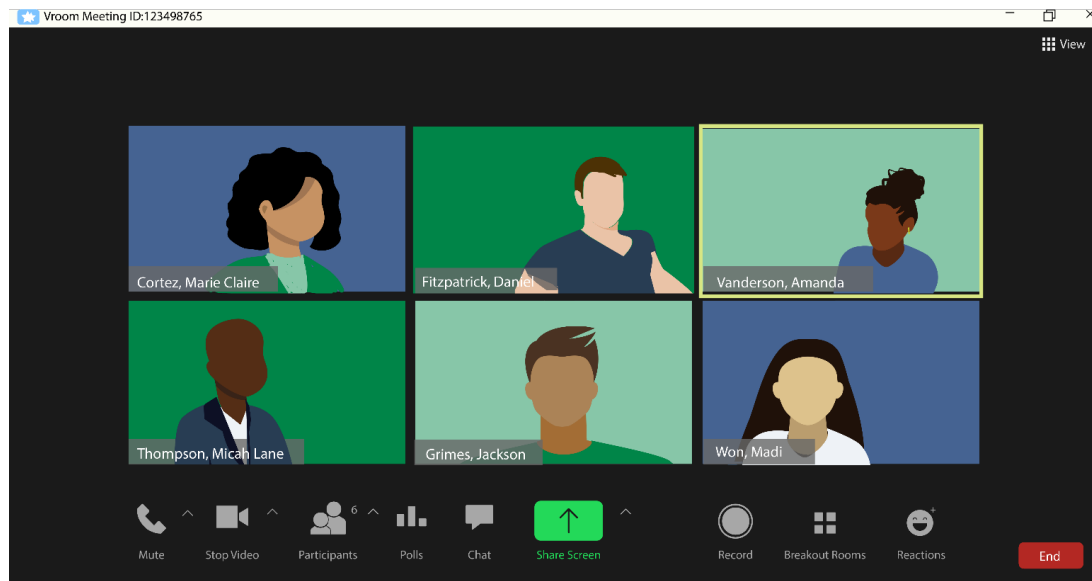
- **Take Security Precautions:** A secure class environment will make participants feel more comfortable with the virtual technology platform. These tips can help you maintain a secure virtual environment:
 - Make sure participants cannot see sensitive information on screen.
 - Make sure class meeting details cannot be forwarded to people who are not part of the class.
 - Make sure you have the right software, including security software, installed.
 - Delete information that is outside the scope of the curriculum or sensitive in nature.
 - Keep passwords and log-in information private.

How to Lead a Virtual Class

When it's time to start your virtual class, here are some actions you will need to take:

- **Log in Early:** Log in to the class 15 minutes early to set up the functions you plan to use—like slide shows, polls, and Q&A sessions. This will reduce the time you need during the class to set up these functions.
- **Give Participants Time to Join:** Participants may run late or have problems logging into the virtual platform. A general rule of thumb is to allow 5 minutes for all (or most) participants to join before starting the class.
- **Review Class Rules:** Participants will have received information about expectations and etiquette in emails before the class. Consider or discuss the following factors as appropriate:
 - **Video Use:** Will participants be expected to be on camera during the class? Be aware of how facial expressions may come across on video. Look at the camera to make eye contact, especially when listening. Be aware that some participants may not want to be on camera during the class. Don't require video or "strongly encourage" its use. Offer it as an option for participants.
 - **Audio Muting:** Will participants be expected to mute their audio when they're not speaking? This is important to consider because unintended background noise can disrupt class discussion.
 - **Virtual Backgrounds:** Will participants be asked to use a virtual background? If so, let them know that backgrounds must be appropriate to the subject matter. For example, they can use an image of their favorite healthy snack or physical activity.
- **Manage Virtual Class Functions:** Determine what functions you need to use to achieve the desired class outcomes. These functions will vary depending on the platform you choose. Here are some examples and how they can be used:
 - **Screen Sharing:** If you plan to use presentational materials, display these materials online by sharing your screen. This approach typically works better than asking participants to follow along on the copies you sent them ahead of the class.
 - **Screen Control:** In some instances, you may want to allow participants to control your screen so they can be more hands-on in the learning process—for example, to demonstrate activities or enter data.
 - **Chat Room:** The chat room allows participants to talk among themselves without disrupting a presentation. Chat messages can be sent to everyone in the group or only to certain people, depending on the platform. This function can also be used to answer questions if the platform does not support a Q&A function. You can monitor the chat room throughout the class to make sure all questions are answered before the class ends.
 - **Q&A:** The Q&A function allows participants to send you questions without disrupting the class. You can monitor the Q&A function throughout the class to ensure all questions are answered.
 - **Participant Video Options:** Some videoconferencing tools allow you to select different viewing options to facilitate discussion more easily. The following are viewing options available on most platforms:
 - **Gallery View** allows all participants to see each other and does not emphasize a specific person.
 - **Speaker View** allows you to make the video of the primary speaker larger or automatically "pin" it to the front of the video queue.
 - **Pin Video** is a feature that allows you to enlarge and center videos of specific presenters.

Gallery View of a Videoconference



- **Encourage Participant Engagement:** Getting everyone to participate without talking over each other is one of the more challenging aspects of running a virtual class. To avoid this problem, you can periodically call on individuals to speak or virtually "go around the table" during discussions. This approach can help motivate participation without excluding people who are quieter or more reserved.²

Features of some virtual class platforms can also enhance class participation. For example:

- **Raise Your Hand:** Participants can use this feature to indicate that they want to speak. It is a nonintrusive way to join a discussion.
 - **Polling:** You can use polls to gauge participants' reactions, gather consensus, or make group decisions.
 - **Whiteboard and Annotation Tools:** Participants can use these features to write responses and brainstorm ideas during discussions. Remember to take screenshots of the information submitted so you have a record of it.
 - **Interactions and Emojis:** These can be a fun, easy way to gather informal feedback throughout the class. For example, you could say, "If this was a helpful exercise, use the smiley face. If it was not helpful, use a frowny face."
 - **Breakout Rooms:** At different times during a class, you can break participants into small groups to work through a question and then report back to the entire group.
- **Give Participants Breaks:** To avoid class fatigue, include breaks in your agenda to let participants stretch their legs, go to the bathroom, get a drink, or grab a healthy snack.

Engaging Participants

"I think the virtual platform worked okay, but it took much longer for participants to connect with one another because they never met in person. However, as I learned how to integrate tools such as breakout rooms, polls, video demos, and music, it has helped make the experience more interactive."

—Lifestyle Coach, Gwinnett, Newton, & Rockdale Health Department

- **Collect and Record Class Information:** This task helps ensure that key discussion points are captured, outcomes are recorded, and curriculum objectives are met. You are also required to report some of this information to the DPRP to maintain CDC recognition for your lifestyle change program. See the Submitting Evaluation Data to the DPRP section of the [DPRP Standards](#) for guidance.

Consult with your organization and the DPRP Data Team to ensure that all necessary information is collected during each class and stored appropriately to ensure privacy and data protection in accordance with HIPAA and DPRP reporting requirements. Data collection can be done privately through emails, text messages, surveys, data collection software, or health tracking applications. Any data collection software you use must be HIPAA compliant.

The following information may need to be collected:

- **Participant Information:** Collect information such as why participants joined the class and demographic data such as age, race, ethnicity, and educational level.
- **Weight:** Collect each participant's weight at each class. Use discretion and get participant input on how best to collect this information. A Bluetooth-enabled scale is an effective way to collect weight discretely.
- **Physical Activity:** Use a fitness or activity tracker to collect minutes of physical activity.
- **HbA1c:** You may need to collect HbA1c values to determine participant eligibility or to meet specific class outcomes to achieve CDC recognition.
- **Action Items:** Collect this information to help ensure that participants are making progress and completing program requirements. Be as specific as possible. For example, "John Smith will be responsible for reporting his final HbA1c levels at the next class."

QUICK TIP

To record attendance, ask participants to use the chat function to enter their name and the time they logged in at the start of class. Copy and paste this information into your records before the class ends. Or you can copy and paste or take a screenshot of the list of participants on your computer screen. When people dial in by phone, phone numbers may appear on your screen. Ask participants to identify their phone numbers so your attendance records will be accurate.

What to Do After Your Virtual Class

After each class, send follow-up information to help participants prepare for the next class. For example:

- **Identify Action Items and Set Expectations:** At the end of each class, send an email to all participants that outlines specific action items and tells them what they're expected to do before the next class.
- **Recognize Successes as a Group:** Celebrate positive outcomes—such as increased physical activity minutes—to encourage the class.
- **Schedule the Next Class:** Use the recurrence feature of your meeting invitation software so participants can use the same log-in information each time and know when to anticipate the next class. This approach will save time for you and your participants.⁴

References

1. Centers for Disease Control and Prevention. [*CDC Diabetes Prevention Recognition Program Standards and Operating Procedures*](#). US Dept of Health and Human Services; 2021.
2. Pullan P. [*The seven secrets of successful virtual sessions*](#). Paper presented at: PMI Global Congress 2011—EMEA; May 10, 2011; Dublin, Leinster, Ireland.
3. National Diabetes Prevention Program. Curricula and Handouts. PreventT2 Curriculum and Handouts (English). Updated August 25, 2020. Accessed March 4, 2021. <http://www.cdc.gov/diabetes/prevention/resources/curriculum.html>
4. Prossack A. How to run a successful virtual meeting. *Forbes Magazine*. March 30, 2020. Accessed March 12, 2021. <https://www.forbes.com/sites/ashiraprossack1/2020/03/30/how-to-run-a-successful-virtual-meeting/?sh=3f40f5207214>

Acknowledgements

Thank you to the following organizations that allowed their personnel to contribute to this document: Temple University; University of New Mexico Hospital Center for Diabetes; State of Wellness, Inc.; Black Women’s Health Imperative; and the Gwinnett, Newton, & Rockdale Health Department.

Suggested Citation

Centers for Disease Control and Prevention. *Managing a Virtual Class*. US Dept of Health and Human Services; 2022.