Providing Healthy Marriage and Relationship Education Programs Virtually: Lessons from a Case Study of the ELEVATE Program in Florida

July 2021

STREAMS

Strengthening Relationship Education and Marriage Services

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Providing Healthy Marriage and Relationship Education Programs Virtually: Lessons from a Case Study of the ELEVATE Program in Florida

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Overview

Introduction

Since 2006, the Office of Family Assistance (OFA) within the Administration for Children and Families (ACF) at the U.S. Department of Health and Human Services has provided grants to agencies implementing healthy marriage and relationship education (HMRE) programming for a range of populations. In large part, grantees have provided services in person to the populations they serve. In recent years, however, HMRE program developers and practitioners have explored how to take advantage of the Internet and technological tools to reach couples who would benefit from HMRE program services.

This report presents findings from a case study of how one HMRE program transitioned from providing services in person to providing them virtually. From January 2017 to March 2020, the University of Florida (UF) offered a five-session couples' workshop—ELEVATE—to married and unmarried couples in six counties across the state. Like many social service programs, ELEVATE was interrupted in March 2020 by the COVID-19 pandemic and the consequent restrictions on in-person program services. After a two-month pause, UF resumed the ELEVATE program in May 2020 using a fully virtual format with no in-person instruction. The lessons that program staff learned from that experience have relevance for other HMRE program developers and providers who are considering offering virtual services.

Primary research questions

1. How were in-person group HMRE services adapted and how were program staff trained for a virtual group service format? How did program staff interact with clients during virtual workshops and what were the clients' experiences?

2. What challenges did staff report both in transitioning to and in implementing virtual workshops? What solutions were implemented to address these challenges?

3. How were clients who enrolled in virtual workshops different from those who enrolled in in-person workshops? How did their rates of program retention and completion differ?

Purpose

This report presents findings from a case study conducted in spring and summer 2020 as UF transitioned from in-person to virtual programming. It describes how the transition to virtual programming affected the program's approach to such issues as staff training, participant recruitment and enrollment, facilitation practices, strategies for retaining participants, and staff supervision and support. The report also documents the study methods and highlights key considerations for other programs that may want to offer virtual services. The study was conducted as part of the Strengthening Relationship Education and Marriage Services (STREAMS) evaluation for ACF at the U.S. Department of Health and Human Services.

Key findings and highlights

- The switch to virtual programming required careful advance planning. Program leadership updated the written guidance given to workshop instructors and met regularly with the instructors about how to maintain core program components.

- For UF, the shift to virtual programming required only minor changes to its recruiting strategies. Even before the switch to virtual programming, UF recruited about 40 percent of participants through online advertising. Over a four-month period, enrollment for the virtual program exceeded enrollment for the in-person program over the same four-month period the year before.

- The UF program's registration and enrollment procedures required greater adaptation than did the recruiting strategies. For the in-person program, participants had to complete a consent form and two preprogram surveys during the first workshop session. With the shift to virtual programming, the program had to develop an alternative way for participants to complete these requirements.

- UF program staff found that one of the biggest differences between in-person and virtual programming involved the skills and strategies instructors needed to facilitate the virtual workshop sessions. Successful virtual facilitation required instructors to set clear expectations among participants regarding technology, workshop etiquette, and participation; careful planning and deliberate effort to create connections between instructors and participants; and instructors' skillful use of the technology platform used for the workshop sessions.

- Participants' attendance across the five workshop sessions remained consistent from in-person to virtual workshops. Although virtual programming mitigated some barriers to in-person attendance, other barriers continued to exist. UF implemented several strategies to encourage attendance, including weekly reminders, flexible make-up session options, and gift card incentives.

- Transitioning from in-person to virtual programming can be challenging for new and experienced instructors alike. UF program leadership supported program instructors by providing weekly feedback on recorded workshop sessions, offering ongoing support with technology, and having new instructors shadow experienced instructors. Such continued, flexible support from program leadership was critical for instructors' ongoing skill development.

Methods

This case study is based on data collected from multiple sources between May and September 2020. We held biweekly telephone meetings with program leadership, conducted virtual interviews with program leadership and staff, convened virtual focus groups with program instructors and participants, observed recorded workshop sessions, and analyzed program attendance and survey data. The team used an inductive, group-based process called consensual qualitative analysis to systematically identify themes and key findings across the data collection activities.

Recommendations

Overall, strong recruitment and enrollment numbers for UF's program show that with careful planning and the right approach, HMRE program providers can find demand for virtual HMRE programming. Offering virtual programming may reduce barriers, such as childcare and transportation, that could prevent some couples from attending in-person HMRE classes. Other programs may want to evaluate their service delivery model to determine if virtual programming may work for their participants, even when in-person instruction is possible.

A. Introduction

Since 2006, the Office of Family Assistance (OFA) within the Administration for Children and Families (ACF) at the U.S. Department of Health and Human Services has provided grants to agencies implementing healthy marriage and relationship education (HMRE) programming for a range of populations. In large part, grantees have provided services in person to the populations they serve. In recent years, HMRE program developers and practitioners have explored how to take advantage of the Internet and technological tools to reach couples who would benefit from HMRE program services. Research has found that couples experience barriers to accessing relationship services provided in person (Dion, Avellar, and Clary 2010; Gaubert et al. 2012; Zaveri and Baumgartner 2016; Alamillo, Paulsell, and Friend 2020). Providing HMRE services virtually has two key potential benefits to participants: (1) to help them avoid common barriers, such as transportation and child care, because they can access services from their own homes and (2) to serve them in a cost-effective way (Doss et al. 2020; Williamson et al. 2019; Salivar et al. 2018). This interest in exploring virtual HMRE services grew in 2020 when the COVID-19 pandemic limited programs' ability to offer in-person HMRE services.

As part of the Strengthening Relationship Education and Marriage Services (STREAMS) evaluation (described in Section A), this report presents findings from a case study of how one HMRE program transitioned from providing services in person to providing them virtually. From January 2017 to March 2020, the University of Florida (UF) offered a five-session couples' workshop—ELEVATE—to married and unmarried couples in six counties across the state. Trained staff from the UF Institute of Food and Agriculture Sciences' county-based Cooperative Extension Service conducted the sessions in person. Like many social service programs, ELEVATE was interrupted in March 2020 by the COVID-19 pandemic and the consequent restrictions on in-person program services. After a two-month pause, UF resumed the ELEVATE program in May 2020 using a fully virtual format with no in-person instruction in accordance with federal, state, and local health guidance. Other HMRE program providers have tested the feasibility and effectiveness of delivering HMRE services through online learning, in which participants complete the course content at their own pace (see, for example, Braithwaite and Fincham 2011). UF's experience differed, however, because the program delivered live virtual group instruction via workshops. Moreover, the program had to make this shift unexpectedly, and it had to move quickly to launch virtual programming. The lessons that program staff learned from that experience have relevance for other HMRE program developers and providers who are considering offering virtual services.

> The Strengthening Relationship Education and Marriage Services (STREAMS) evaluation is a random assignment impact study and in-depth process study of five HMRE grantees funded by the Office of Family Assistance within the Administration for Children and Families at the U.S. Department of Health and Human Services. The STREAMS evaluation of UF's ELEVATE program consisted of a process study and a randomized study that examined the impacts of text message reminders on couples' workshop attendance when services were offered in person (prior to the COVID-19 pandemic). See Section A for more information.

This case study report describes UF's transition to and implementation of ELEVATE in virtual form between May and September 2020. Specifically, the case study sought to explore the following research questions:

- How were in-person group HMRE services adapted for a virtual format? How were program staff trained on delivering virtual group services?

- How did program staff interact with clients during virtual workshops? What were the clients' experiences with virtual programming?

- What challenges did staff report both in transitioning to and in implementing virtual workshops? What solutions were implemented to address these challenges?

- How were clients who enrolled in virtual workshops different from those who enrolled in in-person workshops? How did their rates of program retention and completion differ?

This report is based on data collected from seven sources:

1. **Regular meetings with program leadership.** From May to September 2020, we held biweekly telephone meetings with program leadership to learn about their processes for shifting to the virtual format and documenting ongoing best practices and challenges with recruitment, retention, and engagement.

2. **Observations of recorded workshops.** We used an observation checklist to review eight recorded virtual workshops that were delivered in July and August 2020. This checklist covered several dimensions of virtual facilitation, including the use of technology and participant engagement in group discussions and activities.

3. **Virtual focus groups with program instructors.** In August and September 2020, we held focus groups with all six instructors (two focus groups with three instructors in each group). These focus groups addressed instructors' perceptions of their training and the supervision they received, as well as their thoughts on program delivery and participant engagement.

4. **Virtual focus groups with participants.** We held one focus group with three couples in August 2020, which focused on participants' perceptions of the virtual program.

5. **Virtual interviews with program leadership.** In September 2020, we conducted two interviews with the UF program leadership team to hear their reflections on the shift to virtual programming and subsequent implementation, focusing on best practices and future directions.

6. **nFORM attendance data from 2019 and 2020.** The Information, Family Outcomes, Reporting and Management (nFORM) system is the client management system that OFA provided to UF. UF staff entered workshop attendance and other data about service delivery in the system.

7. **Applicant characteristic and entrance survey data from both 2019 and 2020.** Participants completed an applicant characteristics survey and entrance survey immediately before the first session of ELEVATE. The surveys gathered information on participant demographics and relationship characteristics.

In Section B, we describe the ELEVATE program as well as the STREAMS evaluation. Section C describes how UF prepared for the transition from in-person to virtual workshops and discusses UF's approach to training staff to facilitate virtual workshops. We then describe UF's recruitment and enrollment processes for the virtual workshops in Section D. We present information on UF's virtual facilitation practices in Section E and its strategies for retaining participants in the workshops in Section F. Section G details UF's approach to supervision and ongoing support. In Section H, we summarize lessons learned from UF's virtual delivery of ELEVATE. Throughout the report, we highlight key considerations for other programs that are considering offering virtual services based on the experiences of UF. These considerations have not been rigorously tested.

B. Background on the STREAMS evaluation and UF's ELEVATE program

In 2015, ACF's Office of Planning, Research, and Evaluation (OPRE), with funding from OFA, contracted with Mathematica and its partner, Public Strategies, to conduct the STREAMS evaluation to help identify strategies for improving the delivery and effectiveness of HMRE programs. The evaluation has a particular emphasis on understudied populations and program approaches not studied in ACF's prior federal evaluations. One of the grantees included in the evaluation was UF, which implements ELEVATE. For STREAMS, we worked with UF to test whether text messages informed by behavioral science can improve couples' attendance at ELEVATE sessions (Alamillo et al. 2020). An earlier process study report prepared by the STREAMS evaluation team describes how UF initially developed and implemented ELEVATE as an in-person workshop program for couples in Florida (Alamillo et al. 2020). A future report will describe findings from the impact study of text message reminders on couples' workshop attendance.

Starting in 2017, UF delivered workshops based on the ELEVATE curriculum through five weekly in-person sessions in six counties across the state. ELEVATE is a popular curriculum for adult couples of all ages who may or may not be married. It was developed as part of the Alabama Healthy Marriage and Relationship Education Initiative for delivery through the UF's Institute of Food and Agriculture Sciences county-based Cooperative Extension Service. The curriculum has two primary goals: (1) to teach couples practical strategies and tools to maintain a healthy relationship and (2) to develop mindfulness practices that help couples regulate their physiological responses to conflict and stress. Couples were recruited for the program primarily through Internet advertisements, including social media, and flyers and community events. Several days before the first workshop session, couples received welcome emails with the time and location of each session; they also received a call from their instructor to confirm their plans to attend. During the first session, participants completed a consent form and two pre-program surveys. To encourage attendance, the program offered gift cards to the couples and the ability to make up any missed classes via video recording or by attending a different class within the same week. Throughout this report, we highlight how UF adapted its in-person program to fit the virtual environment. Appendix A compares in-person and virtual program design and implementation.

C. Preparing for virtual program delivery

Adapting in-person programming to the virtual environment

In part because UF's shift from in-person to virtual programming was unexpected and needed to occur quickly as a result of the COVID-19 pandemic, program staff spent the first two months of the pandemic preparing for virtual programming before the launch of classes. Much of the planning focused on how to maintain the fundamentals that made its program successful in person while adapting to the virtual environment.

One of the biggest changes UF made was to adapt the guidance documents that program leadership gave to the workshop instructors. For its in-person program, UF had developed a written procedures guide with detailed instructions on how to conduct each of the five ELEVATE workshop sessions. Program leadership used the guide to support workshop instructors in each of the six program counties and to help promote the consistency and quality of programming across counties. For the shift to virtual programming, program leadership modified the procedure guide for the virtual environment, including

guidance on how to pace each session, present the curriculum slides, incorporate breaks, record attendance via the chat feature, and employ strategies for making the online environment inviting (such as playing light music before class). Over a six-week period preceding the first virtual workshop, program leadership walked through the adapted program procedure guide with instructors in weekly 90-minute meetings. During these meetings, program leadership and instructors discussed the technological platform and how facilitation skills might be used to engage participants. For example, information technology staff taught instructors how to create breakout rooms for couples to hold discussions privately. Instructors later credited this updated guide and training with helping them feel prepared to conduct the workshop virtually, as it provided them with step-by-step guidance for each session.

During the six weeks leading up to the first virtual workshop session, staff spent time discussing how to maintain core program components while planning for necessary adaptations to classroom activities and strategies to help mimic the feel of an in-person class. For example, the in-person program included an activity called "Stressors Crowd Us," in which one couple would talk about their day as the other couples in the class surrounded them and shouted stressor words to demonstrate how stress can affect communication. In the virtual environment, couples could not crowd around the couple in the same way, but instructors found that asking couples to shout stressor words in the virtual workshop still allowed them to accomplish the purpose of the activity.

In part because UF's transition to virtual programming needed to happen within two months, program leadership did not have much time to conduct an in-depth assessment of available technology platforms and other resources that were required to deliver the program (such as a reliable Internet connection). Like many organizations, UF decided to use its existing technology platform, Zoom, and this platform ultimately met its needs, which included the ability for participants to share video, instructors to share their screen to present curriculum material, and program staff to record sessions. Learning how to leverage the Zoom platform to deliver ELEVATE successfully in a virtual format took time. For example, instructors needed to learn how to navigate the technology platform seamlessly as they continued to facilitate group discussion. Program leadership indicated that allowing adequate time to prepare staff before launching the online program was critical for delivering ELEVATE effectively.

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Considerations for other programs: Preparing for virtual program delivery

- **Review the program's content and approaches with an eye toward adaptation.** Think through how to maintain the program's core components in a virtual environment. Update any written guidance or instructional materials provided to instructors. Brainstorm how instructors could mimic the in-person experience for participants in a virtual setting. Engage the curriculum developer on potential modifications, whenever possible.

- **Determine which technology will meet your program's needs**. Think through which virtual facilitation tools the program needs to deliver the curriculum and engage its audience (for example, screenshare and video sharing capabilities). Research platform compatibility with different operating systems and technological devices, as participants may access the platform in various ways.

- **Ensure that staff have the resources to deliver the program virtually.** The resources required may vary by program, but at a minimum staff need a reliable Internet connection and other technological resources, such as a webcam.

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Training staff for virtual program delivery

In the 90-minute weekly meetings preceding the virtual workshops, UF program leadership trained instructors on how to use the adapted program procedure guide and conducted a detailed curriculum review of the five workshop sessions. Leadership intended these trainings to be highly participatory, with instructors sharing tips with one another or raising questions for group discussion. During the training portion of the meetings, leadership demonstrated how content should be delivered in the virtual environment and identified the core or essential lessons from each session.

After each meeting, instructors recorded themselves teaching a practice session, known as a teach-back. The other instructors would either participate during the teach-back role-playing as a program participant or review the recorded session and provide feedback to program leadership. Program leadership also reviewed each recording and gave the instructors feedback based on their own observations and those of the other instructors. This feedback focused on areas of strength and opportunities for improvement. Instructors had the opportunity to ask questions during the next weekly meeting, after they had processed the feedback they received.

> **"[The teach-backs] literally were the most stressful part of my weeks when I had to prepare to teach those recorded calls, but that's … why I'm able to [teach virtually now], because I got to do it, not just talk about doing it. We did it, we evaluated it, we [may have] said, 'Oh that was bad, let's not do that again.'"**
> **– ELEVATE instructor**

Some instructors supplemented the program-led training to boost their feelings of preparedness. For example, one instructor conducted additional practice sessions over Zoom with friends and family to mimic the experience of teaching virtual sessions to a small group. Another instructor noted that she explored the technology platform from a participant's perspective to understand what her participants would see when they joined the workshop; doing so bettered the odds that she could troubleshoot any issues they experienced with the virtual platform.

Overall, instructors reported that practicing facilitation in the virtual environment was critical to feeling comfortable and adequately prepared to teach virtually. Once they began facilitating sessions virtually, they adapted their approach to reflect their experiences, new strategies shared from other program staff, and the differing needs of each class. Instructors noted that it was not possible for them to anticipate every challenge, but their training and support structure, including supervisor and team meetings and regular feedback on their facilitation after the classes launched, helped them address issues as they arose.

Considerations for other programs: Training staff on virtual program delivery

- **Use a variety of training methods to prepare staff to facilitate virtual workshops.** Switching from in-person to virtual workshops is a new experience, so expect that even seasoned instructors will need training, support, and opportunities to practice. In addition to group trainings, consider using teach-backs to give instructors time to practice. Hands-on practice may increase their comfort with the technology, and getting individualized feedback on their virtual facilitation skills could boost their preparedness and confidence in teaching virtually.

- **Create opportunities for peer learning.** Especially if the training is conducted remotely and instructors do not have in-person interaction with one another, create a way for instructors to share what worked well for them, such as practices or technological features, directly with one another. This could happen through formal meetings or informal relationships that instructors cultivate over time.

- **Highlight to instructors the importance of flexibility, adaptability, and comfort with failure.** Even with rigorous training and planning, it is impossible for programs to prepare for every challenge that arises with virtual instruction. Unique challenges that may not have been addressed during training will inevitably occur during live facilitation. Prepare staff for the possibility that something could go wrong and give them clear guidance on how to react in those situations.

D. Recruiting and enrolling participants

Recruiting participants

For UF, the shift to virtual programming required only minor changes to its recruitment practices. As discussed earlier, UF relied on a mix of referral sources for its in-person program (Figure 1). For the switch to virtual programming, it leveraged its success recruiting via online advertising through social media posts, which accounted for about 40 percent of the in-person enrollment and just over 30 percent of the virtual enrollment. Moving to virtual programming allowed UF to expand the reach of online recruitment beyond the cities in which the in-person classes were delivered. For example, instead of focusing recruitment efforts in Gainesville, Florida, the program advertised classes to the broader Alachua County via Facebook advertisements and a Facebook group dedicated to the county. Word of mouth remained an important referral source for the program. In the third session of the workshop, instructors talked to participants about referring anyone they knew who might be interested in the program and emailed them a flyer about the ELEVATE program to share. The program also received referrals from

community partners, responses to print advertisements, and other sources, such as a participant's church, a participant's significant other, or emails from the University of Florida.

Figure 1. Recruitment referral sources for ELEVATE
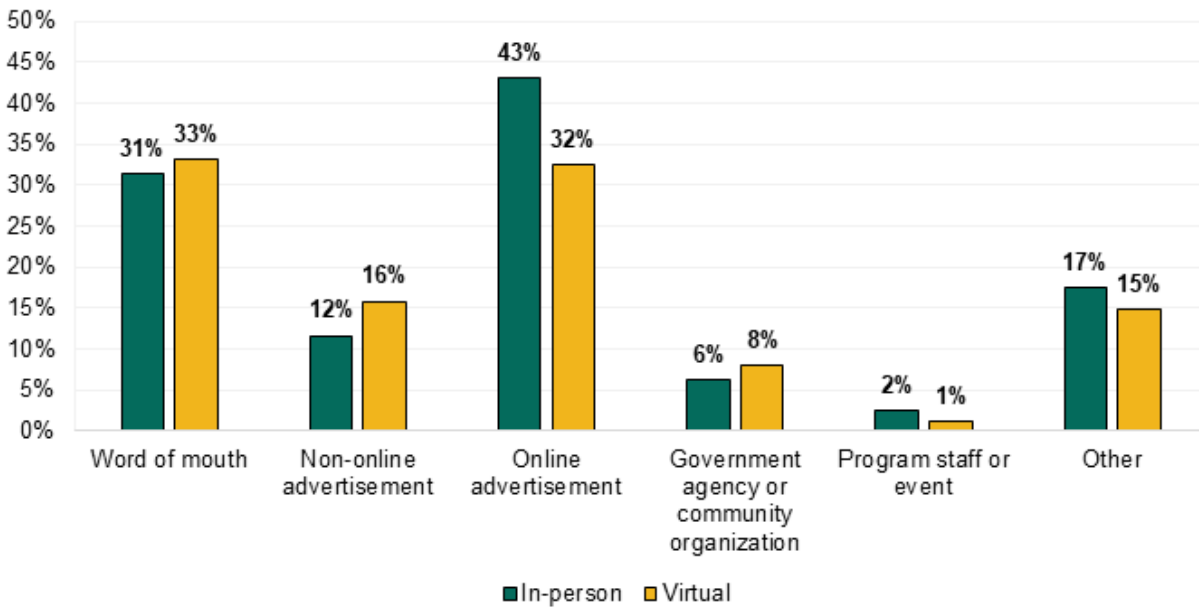
Source: Applicant characteristics survey administered by UF to program participants.

Notes: Sample size = 481 for in-person and 410 for virtual. "Virtual" includes all participants enrolled between May and September 2020. "In-person" included all participants enrolled over roughly the same period the year before (May and September 2019).

Not all percentages add to 100 percent due to multiple items being endorsed or missing responses.

When moving to the virtual format, UF program staff slightly modified how they described the program in their recruitment materials. Recruitment materials for the in-person workshop emphasized that the workshop (1) focused on strengthening relationships between couples, (2) was held once a week in the evenings for five weeks, (3) was free to participants, and (4) included gift card incentives and a light meal. For the virtual workshop, they revised the recruitment materials to remove the reference to offering a light meal during sessions, indicated that the class would occur via Zoom, and doubled the incentive amounts offered. The program leadership decided to increase the incentive amount because they thought the higher amount might attract more participants.

Participants recruited into the virtual program looked largely the same as those who attended in-person classes during the same time frame in 2019, when the classes were offered in person. Most participants were white and employed, had children, and attended or had graduated from postsecondary programs. There were some modest differences in age, socioeconomic characteristics, and educational background. For example, participation among younger couples ages 25 to 34 years grew, while participation among older couples ages 55 and older declined. In addition, the percentage of participants who had a bachelor's degree or higher grew from 40 to 50 percent when moving from in-person to virtual workshops. However, the overall characteristics of the groups were similar.

Table 1. Characteristics of participants enrolled in ELEVATE

	In person	Virtual
Age (%)		
Younger than 25	10	6
25–34	33	40
34–44	25	26
45–54	12	16
55 and older	18	12
Race/ethnicity (%)		
White, non-Hispanic	56	65
Black, non-Hispanic	18	15
Hispanic/Latino	18	16
Other	7	6
Highest education level (%)		
Less than high school	2	1
High school degree/GED	12	9
Some college or currently enrolled in college	46	38
Bachelor's degree or higher	40	52
Currently employed (%)	83	81
Earnings per month (%)		
Less than $500	14	19
$500–$1,000	7	4
$1,001–$2,000	21	12
$2,001–$3,000	20	23
More than $3,000	37	42
Difficulty paying bills (%)		
Never or rarely	84	90
Somewhat often	11	8
Very often	5	3
Number of children (%)		
0	0	0
1	36	43
2	33	29
3 or more	31	28
Ages of children (%)		
Between 0 and 4 years old	27	26
Between 5 and 7 years old	17	17
Between 8 and 10 years old	14	10
Between 11 and 14 years old	19	23
Between 15 and 17 years old	13	10
Between 18 and 21 years old	10	15
Sample size	**481**	**372**

Source: Applicant characteristics and entrance surveys administered by UF to program participants.

Note: "Virtual" includes all participants enrolled between May and September 2020. "In person" includes all participants enrolled the year before over roughly the same period (May and September 2019). The "Ages of children" categories are not mutually exclusive. Not all percentages add to 100 percent due to rounding.

GED = General Educational Development.

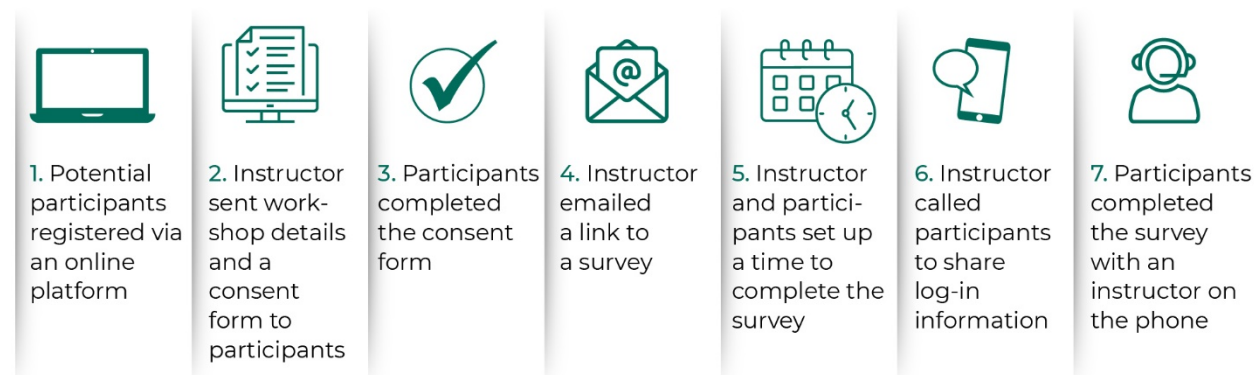## Considerations for other programs: Recruiting participants

- **Assess program recruitment practices to determine whether changes are needed.** Programs should review their current referral sources to determine whether those sources are still viable recruitment strategies in the virtual environment. Leverage existing recruitment practices on social media platforms, if they exist. For programs without an existing social media or online recruitment presence, explore whether an online recruitment presence would help reach couples interested in program services.

- **For programs pursuing social media recruitment, think carefully about advertisement strategy.** To reach potential participants, UF continued to use Facebook, posting both general advertisements and notices to specific groups in their counties. However, programs could use many other platforms to reach target populations. Think carefully about the intended audience for the advertisement.

Enrolling participants

The UF program's registration and enrollment procedures required greater adaptation than did the recruiting strategies. In part because UF's program was funded through a federal grant, participants had to complete a consent form and two preprogram surveys to enroll. For the in-person program, participants could complete these requirements in person during the first workshop session. With the shift to virtual programming, the program had to develop an alternative way for participants to complete these requirements.

As Figure 2 indicates, couples registered for an upcoming workshop series through an online platform up to one week before the first workshop session. Once they registered, staff sent an initial email to the participants with detailed information about the workshop and instructions on how to complete the online consent form. Couples were expected to complete the consent form no later than four days before their scheduled first class. Once the consent form was completed, the instructor sent a follow-up email with a link to the preprogram survey and a request to set up a time for the participants to complete the survey. At the arranged time, the instructor would call the participants to provide their log-in information to the survey and answer any questions. Both members had to complete the survey in order to participate in the workshop.

Figure 2. The ELEVATE program enrollment process

| 1. Potential participants registered via an online platform | 2. Instructor sent workshop details and a consent form to participants | 3. Participants completed the consent form | 4. Instructor emailed a link to a survey | 5. Instructor and participants set up a time to complete the survey | 6. Instructor called participants to share log-in information | 7. Participants completed the survey with an instructor on the phone |

This process produced several challenges for the instructors and participants. Initially, program staff emailed participants their survey usernames and passwords in a password-protected document. Because the passwords would time out after four days, participants could not access the survey if they did not log in immediately, leading to some back and forth between participants and instructors. In addition, participants often had questions about the survey, which led to emails and texts to instructors, often sent outside instructors' normal working hours. To address these challenges raised by program staff, the leadership streamlined their procedures; instructors began emailing participants a link to the survey and asking them to schedule a time to complete it while on the phone together. They provided the log-in information to participants over the phone and answered any questions about how to complete the surveys, which resulted in fewer email communications and reduced the burden on instructors. Although this revised process reduced some burden, instructors still found it difficult to address both technological issues and questions about completing the surveys because they were unable to see the participants' screen. During in-person classes, instructors could see the issue firsthand.

Despite these challenges, UF's enrollment for the virtual program over a four-month period exceeded the enrollment for the in-person program over the same four-month period the year before (Figure 3). Between May and August 2020, UF enrolled 229 couples into the virtual ELEVATE classes. During this time, it offered 66 workshop series of ELEVATE across the six counties. Enrollment into virtual programming increased from that for the same period in 2019, from 193 couples to 229 couples (Figure 3).

Figure 3. Enrollment in ELEVATE, by month
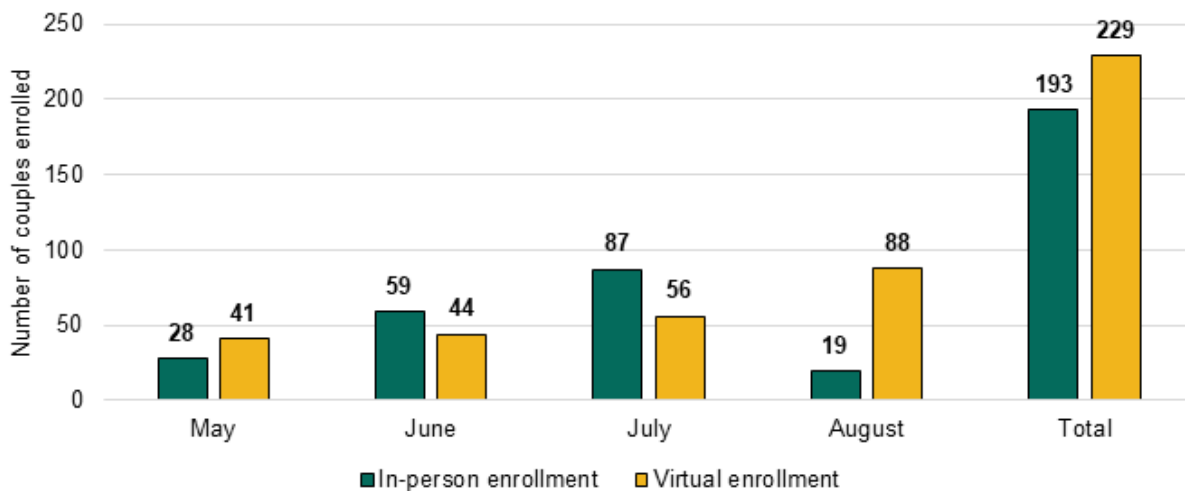
Source: nFORM.

Note: "Virtual" includes all participants enrolled between May and September 2020. "In-person" includes all participants enrolled over roughly the same period the year before (May and September 2019).

Reflecting on their experience, program staff expressed the belief that the revised enrollment process had several unintended benefits: it allowed relationship-building before the class, greater attention to content in the first session, and higher attendance rates. Because the virtual registration process required more communication before the first session, program staff could develop a relationship with applicants earlier than they could have when classes took place in person. Program staff also reported that completion of the consent and surveys before the first night of the workshop allowed more focus on content than on administrative matters during the first session. Both program leadership and instructors also reported that applicants who invested the time to complete the consent form and surveys were more likely to attend the

first session. For example, the attendance rate for the first session across all counties for the third virtual workshop series was 93 percent, which is higher than the attendance rate for the in-person workshop sessions (Alamillo et al. 2020). In Section E, we discuss UF's strategies for retaining participants.

Considerations for other programs: Enrolling participants

- **Have participants complete enrollment paperwork or surveys before the first workshop session.** Time typically spent on administrative tasks during the first class session can be redirected into more time for programming or relationship building between participants and the instructor. Instructors can also use this initial contact with the participants to build rapport before the first class. This is especially important in the virtual environment because relationships between instructors and participants can be more difficult to develop.

- **Look for opportunities to streamline program registration and enrollment**. Consider the switch from in-person to virtual programming to be a chance to review existing enrollment procedures and identify opportunities to streamline these procedures. Collect feedback from program staff and participants about their experiences to address common challenges with the enrollment process.

- **Consider using virtual tools to facilitate the enrollment process**. For example, program staff could leverage a screen-sharing feature to address technological challenges participants may face as they proceed through the steps of the registration process. Doing so would help re-create the in-person experience of an instructor looking over a participant's shoulder and seeing the issue firsthand.

E. Facilitating virtual workshops

UF program staff found that one of the biggest differences between in-person and virtual programming involved the skills and strategies instructors needed to facilitate the virtual workshop sessions. Program leadership directed instructors to discuss program expectations regarding technology and virtual workshop etiquette and participation with the participants. Instructors found that they had to plan to create connections between themselves and participants, as well as among participants, because those connections did not occur as naturally as they did when classes were held in person. Finally, successful virtual facilitation also depended on the instructor's ability to navigate the technology well, thus preventing it from distracting from the curriculum content and discussion.

Setting expectations for participants

ELEVATE instructors found that setting expectations with participants from the moment they started working with them was critical to their success in facilitating virtual workshops. They focused on providing clear guidance to participants in the following areas:

1. **Technology.** Instructors indicated the importance of communicating with participants about technology, both in their early conversations before the workshop and during the workshop.

- Instructors gave participants written instructions to help them navigate the virtual platform, including tips on how to join the workshop, mute and unmute their microphone, and use the chat box.

- Instructors encouraged participants to log on early to the class to allow time for troubleshooting technology challenges. Among such challenges were participants' general discomfort with technology, having never used the platform, problematic Internet connection speed, and device-related issues.

- Technological issues did occur, but they were not persistent or pervasive. In general, instructors indicated that virtual group discussions were occasionally challenging, as when participants experienced technological issues that interfered with their ability to engage with others in the class. However, as technology challenges arose, instructors informed participants that they would work with them to overcome those challenges during or after the session. For example, a support staff member (who attends one out of the five workshop sessions for survey administration at the end of the session) helped one couple resolve connectivity issues, enabling the couple to rejoin the workshop later in the session.

- Program leadership asked all workshop participants to use video technology, such as a webcam or their camera on their smartphone or tablet, so that instructors and other participants could see them, and to join the call early to make sure their video captured both members of the couple on screen. Some participants expressed privacy concerns about the use of video. Although video was not required to participate, the program strongly preferred that participants used it, explaining to participants that the video was intended to simulate the in-person experience as much as possible. In practice, most participants chose to use their video.

- Instructors told participants what would happen to the workshop in the event that the instructors experienced an interruption in Internet or Zoom connection. In focus groups, participants reported that instructors sometimes had problems with technology, but participants noted that these problems did not negatively affect their overall experience.

2. **Workshop etiquette.** Because participants attended the workshop in their own homes, instructors found that they needed to set additional expectations specific to the virtual environment. For example, on a few occasions participants brought their children to the class, which could be distracting if other participants saw them on camera. To minimize such distractions and to encourage couples to dedicate their time in the session to their partner and the program, program staff began providing written guidance on workshop etiquette to participants after they enrolled in the program and about two or three days before class started. This guidance stressed the importance of the following:

- Minimizing distractions for themselves and others on the call by finding a quiet space to attend the workshop and muting their microphone when they were not speaking

- Avoiding multitasking while in the workshop

- Having all workshop materials available in front of them at the start of each class

> Instructors found that mailing hard copies of the workshop curriculum materials to participants before the first workshop helped participants feel more prepared for the workshop. Although materials were also sent electronically, some participants may not have the ability to print the materials at home. Instructors found that participants could focus more on the lesson and activities if they had physical materials in hand and did not have to view them onscreen.

3. **Workshop participation.** Instructors indicated the importance of providing clear expectations for couples on the interactive nature of the workshop. They wanted to distinguish this workshop from other virtual meetings in which participants may only sit and listen. To encourage participation, instructors used the chat feature of Zoom to solicit answers to questions posed to the group. From the first night of class, they set the stage for inviting discussions, not merely listening passively to the instructor. At the beginning of the first session, instructors provided an overview for the entire curriculum and described the experience that participants could expect. Instructors also used the same tactic at the end of each session: they set expectations for the next week by summarizing the content and activities for the next class and by describing the benefits of attendance.

Building relationships with participants

Instructors worked to establish rapport with participants and make the virtual classroom environment welcoming to them. They deliberately planned for ways to re-create the in-person classroom experience for their virtual classes. As with the in-person classes, instructors sought to present themselves with a dynamic energy on camera from the moment that participants joined the virtual platform. As they did for in-person classes, instructors joined the workshop early so they could greet participants as though they had walked into the classroom. They also played light background music as participants joined the meeting, a practice they continued from the in-person setting. They sought ways to make personal connections with participants to keep them engaged in the workshop. Although they had strived to make connections in their in-person classes, instructors had to try several different strategies in the virtual sessions to make connections that might have happened more naturally in person. For example, instructors made it a point to call participants by name and to ask about any previously mentioned events in their personal life.

> **"Creat[e] that same environment that you would in person as if they kind of just walked through the classroom doors. And, of course, it's a little bit unnatural. You can't expect everybody to see this as a classroom, but I think … if you would set that expectation … you kind of set that mood in the room, and it all will follow."**
>
> **– ELEVATE instructor**

> **"I think we all had to get to know each other and it took a little bit longer online maybe than it would have been in person."**
>
> **– ELEVATE participant**

Instructors also made themselves available to participants outside class time to help build relationships. In addition to signing on early, instructors remained in the virtual platform after class to speak with participants. Moreover, they aimed to stay in touch with participants between classes, so participants knew they could contact the instructor to discuss material covered in the workshop. One instructor noted that she sometimes sent relevant resources to participants to show that she had listened to their input. Staff thought that by demonstrating to participants that they cared about them and their input, individuals felt more valued and motivated to both attend and participate in the workshop.

Facilitating group discussions

To facilitate an open, natural dialogue during the virtual workshop sessions, instructors used open-ended discussion questions targeted to their specific group of participants. They also made an effort to engage quieter members of the group. In addition, instructors shared their personal experiences to increase

participants' comfort and engagement. They expressed some challenges: for example, difficulty with using visual cues as a way to ensure that all participants were attentive, or the inability to see more than five couples on camera at one time when screen sharing. To meet the latter challenge, instructors used the gallery view functionality whenever they were not presenting material. Gallery view displays all couples on the screen at one time, and everyone in the class can see all of the other participants.

UF program leadership indicated that part of their ongoing training with instructors focused on strategies for facilitating meaningful conversation between the instructors and participants. They wanted the instructors to do more than simply thank participants for responding to questions during the workshop sessions—they wanted the instructors to connect participants' responses to the content from the curriculum and use the responses to generate a broader discussion with the group. This kind of interaction might have happened more naturally in person, but in the virtual setting, instructors had to plan and prepare to take the lead on making the conversation happen.

Fostering relationships between participants

Developing relationships among workshop participants in the virtual environment proved more challenging than doing so in person. In the focus group, some participants reported that it was difficult to get to know the other couples in their workshop. In addition, our observations of the workshop session recordings showed little engagement between participants. Instructors confirmed that there was less engagement among participants than in their in-person classes, which prompted them to think more intentionally about how to promote connections between participants. For example, during the icebreaker activity in the first session, instructors had participants introduce themselves; when two participants had something in common, instructors pointed that out to try to jumpstart connections between them. Instructors also used group discussion as a way to engage participants with one another. As we ended our case study, UF leadership mentioned they were working with their instructors to develop and implement strategies to boost interaction and connection among participants. These efforts were still under development during our study, but the program recognized the need for continued growth on this issue.

Navigating technology

Creating a positive and engaging environment for participants hinged on the instructor's own comfort with navigating the virtual platform. UF staff used a variety of technological tools to facilitate their workshop and enhance the experience for participants (see Table 2). For example, for couples who were not located in the same place, instructors created breakout rooms that allowed them to participate together in the activities as a couple. Program staff strived to make the technology as seamless as possible so that participants did not think about it during the workshop. For example, the instructors often toggled between different windows to show curriculum slides, YouTube videos, and the gallery view of participants. Program leadership worked with instructors on the skill of moving between screens while continuing to lecture or facilitate discussion. They also encouraged instructors to avoid narrating their moves from one screen to another because discussing the technology drew attention away from the workshop content and could break up the flow of discussion.

Table 2. Purpose and benefits of UF's tools for facilitating virtual programming

| Tool	Purpose and benefits
Web cameras	• Facilitates face-to-face engagement over distance • Allows participants and instructors to see each other and interact as though physically present
Screen sharing	• Allows participants to view the screen of their instructor • Enables instructors to share PowerPoint slides, videos, and other tools for a more interactive experience
Printed workshop materials	• Lets participants view and take notes in the curriculum while also seeing the virtual platform screen, including any content shared by the instructor and other participants via video • Allows participants to follow along in the materials if a technological issue occurs and they cannot view the screen
Chat feature	• Provides another avenue for engagement with the instructor during sessions, enabling participants to ask questions or engage without speaking aloud • Allows participants to still engage via chat with the instructor if the camera or microphone fails
Breakout rooms	• Allows couples to participate in activities together if they are not in the same location

Considerations for other programs: Facilitating a virtual program

- **Determine expectations specific to your program to emphasize with participants.** Expectation setting is important for ensuring that participants understand what is required of them and what they should expect from the workshop. Examples include expectations for joining the class by camera, staying on mute unless participating in the discussion, knowing when to turn off the camera, and so on.

- **Share guidance on how to handle technological challenges as early as possible.** Addressing how instructors and participants should handle inevitable technological challenges prepares everyone for responding appropriately in those situations.

- **Choose the tools and materials that best support workshop facilitation.** Programs have a variety of technological and other resource materials to leverage to create an engaging virtual workshop experience for participants. For example, for programs that rely on group discussion, consider using technology tools, such as the chat box or breakout rooms, to allow for that engagement in the virtual environment.

- **Consider ways to boost participant engagement with the workshop**. Instructors may want to employ various strategies to increase group discussion as much as possible—for example, asking open-ended questions, pausing for participant questions, and allowing enough time for participants to unmute to speak before moving to the next topic.

- **Brainstorm how to promote engagement among workshop participants.** Engagement among couples may occur less in a virtual setting than in person. Instructors should consider how to re-create the atmosphere of an in-person classroom to promote similar levels of engagement in an online session. Programs need to think about how to deepen relationships among participants in virtual settings.

- **Both technology issues and participating from home may pose barriers to participant engagement.** Proactively identifying mitigation plans for these situations will prepare instructors for reacting constructively if such challenges arise. Consider adding a support person to each workshop session to resolve technology challenges.

F. Retaining participants

The percentage of participants who attended all five sessions of the workshop was consistent with attendance at the in-person classes (see Figure 4).

Figure 4. Comparison of attendance in all five workshop sessions, in person versus virtual
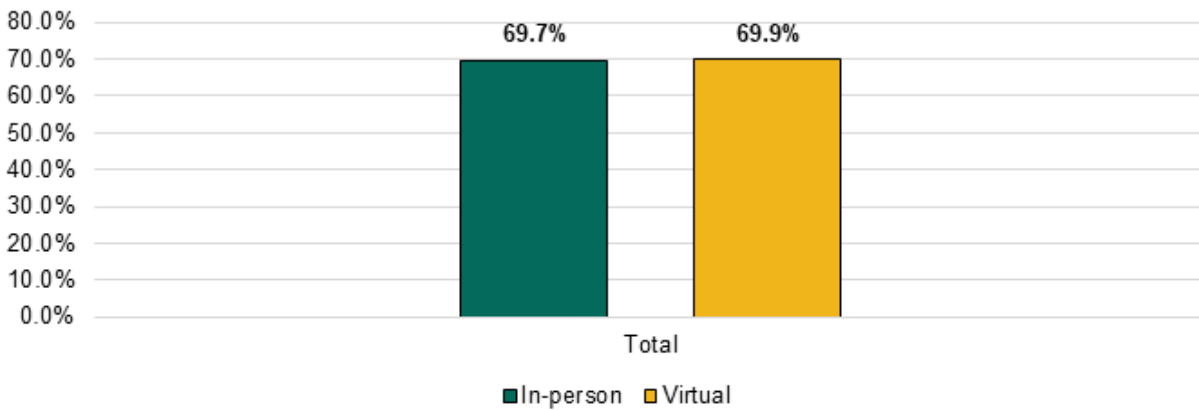
Source: nFORM.

Note: "Virtual" includes all participants enrolled between May and September 2020. "In-person" includes all participants enrolled over roughly the same period the year before (May and September 2019). Overall, 67.9 percent of 109 couples enrolled between May and September 2019 completed all in-person workshop sessions, while 69.9% of 165 couples enrolled between May and September 2020 completed all virtual sessions.

The virtual format helped address many challenges that participants faced while attending in-person classes, such as transportation and child care. However, UF program staff reported that other barriers to participation that arose in in-person classes also occurred in the virtual environment. For example, staff reported that some couples ended their relationship during the workshop or had conflicts with their schedules that made it difficult to attend workshop sessions. Program staff used several strategies to promote retention in the workshop:

- They sent weekly reminders to participants about the upcoming class.

- They continued to offer participants who missed the scheduled workshop the option to attend a make-up session with another workshop within the same week or to view a recorded session. The virtual environment offered the opportunity to have participants join any other live session within the same week, even if that session was in another county, thus increasing participants' flexibility in completing the workshop series.

- They continued to offer gift card incentives for attending the workshop series, but they doubled the amount to $20 per participant for attending the first two sessions and $50 per participant for attending all five sessions. Focus group participants cited both the gift cards and the relationship skills they gained as reasons they continued to attend the workshops.

> ## Considerations for other programs: Retaining participants
>
> - **Offer flexible options for make-up sessions.** Even though the workshops take place in their own home, participants may still miss a session and will need options for making up that content. Having multiple make-up options available boosts the odds that participants will make up missed sessions and complete the program.
>
> - **Consider using incentives to assist with participant retention.** Focus group participants credited the incentive as one motivation to continue attending the workshops. Programs may want to consider using this mechanism to boost retention rates.

G. Supervising and supporting staff

UF offered supervision and ongoing support to instructors throughout the transition to virtual programming. Program leadership gave instructors regular opportunities for feedback to allow for continued skill growth. The core component of their approach was using video recordings of the sessions to provide instructors with feedback on what went well and on areas for improvement. UF leveraged its chosen technology platform, which allowed for high-quality video recording of the instructors and participants.

Each week, instructors recorded their workshop session with participants and submitted it to their supervisor. The supervisor met with each instructor individually to provide feedback and strategize with them on how to overcome any challenges in future classes. Instructors reported that they felt well supported by their supervisor.

In addition, the program also supported the growth of instructors in the following ways:

- Program leadership connected their less-experienced instructors with experienced instructors to observe them facilitating a workshop. Because the program operated virtually, it allowed less-experienced instructors to shadow seasoned instructors, which had been logistically more challenging to implement in person because the program operated in six counties. Learning from experienced instructors supported their skill building. UF also incorporated this shadowing practice into its onboarding process for new instructors hired after the transition to virtual programming.

- The supervisor provided instructors with timely feedback from participants regarding their thoughts and experiences with the program and their instructor. UF previously shared this feedback on a quarterly basis with instructors, but with the move to the virtual environment, it began sending feedback more frequently. Instructors received this information via email and discussed it with their supervisor in their regular check-in meetings.

Program leadership found the need to be flexible to meet the needs of their instructors. Some instructors needed more support than others, particularly with technology, to feel confident in teaching in the virtual environment. As a result, the program offered customized support to instructors throughout the transition to the virtual environment. With this support and with instructors' growing experience in facilitating virtually, leadership began to see marked improvement in virtual facilitation over time.

Considerations for other programs: Supervising and supporting staff

- **Adapt procedures for staff supervision and ongoing support.** Staff may have different supervision and ongoing support needs with the transition to virtual programming. For example, some instructors may require additional support in effectively leveraging the technology platform. Consider asking instructors for input to inform any changes to practices.

- **Ensure that instructors understand how to receive support during the transition.** Transitioning from in-person to virtual facilitation is a larger change for staff. It is important for instructors to know how to obtain the individualized support they need to be successful. In addition, some challenges in the virtual environment may demand immediate support to resolve them in the moment while in a workshop session. Providing staff with clear guidance on how to obtain that support will improve their comfort with virtual facilitation.

- **Create opportunities for peer-to-peer learning**. Programs may want to create a mechanism that allows instructors to share what they learn with each other. As instructors identify practices or technological features that work well for them, create a mechanism through which they can share those discoveries with the broader group of instructors.

- **Consider using video recordings for ongoing skill development.** UF found that video recordings facilitated continuous quality improvement by allowing leadership to see what is working well and areas to focus on for skill development for instructors. Using video recordings to provide instructor feedback may increase accountability for instructors and help supervisors better support instructor growth. Instructors may also benefit from reviewing their own recorded sessions to identify areas for improvement.

H. Lessons learned

Overall, strong recruitment and enrollment numbers for UF's program show that with careful planning and the right approach, HMRE program providers can find demand for virtual HMRE programming. Offering virtual programming may reduce barriers that could prevent some couples from attending in-person classes. Focus group participants, instructors, and program leadership all commented on how couples who could not have attended in person because of transportation or child care challenges were able to take advantage of the virtual workshops. Furthermore, UF demonstrated the ability to continue live instruction in a virtual environment, using technology and virtual facilitation strategies to re-create the environment of in-person classes. Although UF quickly made the transition to virtual programming in response to a global health pandemic, their experiences suggest that this format may benefit participants even when in-person live instruction can continue. Other programs may want to evaluate their service delivery model to determine if virtual programming may work for their participants, even when in-person instruction is possible.

Program staff also found creative ways to address the challenges that can arise in providing programming virtually. To foster relationships among participants and generate group discussion, program staff used the technology platform's gallery view to see all participants on screen at once and they asked open-ended questions to engage participants. They also looked for opportunities to call attention to similarities between participants in an effort to build connections among the group. Implementing HMRE classes virtually demanded up-front planning to create an engaging and participatory class, as well as training, practice, and ongoing support for instructors. UF leadership addressed these challenges by devoting six weeks before the launch of virtual programming to meet with instructors to walk through curriculum adaptations and participant engagement strategies, as well as to provide feedback on instructors' teach-backs. After virtual programming launched, they continued offering regular feedback on instructors' recorded sessions with participants. This infrastructure of support and regular feedback gave instructors the opportunity for continuous improvement of their virtual facilitation skills.

Findings from this case study help contribute to the growing literature on the use of technology and the Internet to provide HMRE program services. This case study sought to understand how one HMRE program provider made the transition from an in-person HMRE program to delivering services virtually. Although UF's experience provides important lessons, there are likely additional lessons to be learned from other organizations that have made a similar switch to virtual programming. In addition, limited research exists on the effectiveness of virtual group workshops like the ones UF delivered, and how the impacts of such workshops compare with the impacts of in-person instruction. Future studies could explore the impacts of group HMRE workshops when delivered virtually.

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Appendix A:

Comparison of In-Person and Virtual Program Design and Implementation

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Category	In-person program design and implementation (January 2017 to March 2020)	Virtual program design and implementation (May 2020 to August 2020)
Recruitment	• Used an online platform to register, track, and monitor participants • Recruited primarily from Internet advertisements and social media, and through flyers and community events • Recruitment message emphasized that the workshop focuses on strengthening relationships between couples and provides logistical details (for example, incentives for participation, schedule, provision of a light meal before class, etc.).	• Used an online platform to register, track, and monitor participants • Recruited primarily via social media, expanded advertising beyond the cities in which staff had delivered in-person classes to the broader counties they operate in • Recruitment message remained largely the same with minor modifications (i.e., workshops via Zoom, greater incentives for participation)
Enrollment	• Sent a welcome email with time and location information to each participant a few days before the first workshop session • Called participants to confirm their plans to attend and answer any questions • Collected the consent forms and administered the baseline and preprogram surveys at the first session	• Sent a welcome email, but added a request for completion of the consent form no later than four days before the first scheduled class • Called participants to assist with completion of the preprogram surveys and answer any questions • Collected consent forms and preprogram surveys from participants before the first session via phone or email
Post-enrollment data collection	• Administered an OFA-required exit survey and a UF-sponsored survey during the last session	• No changes implemented
Workshop facilitation	• Conducted workshops in person once a week • Offered a shared meal at each session • Class size averaged about 8 couples, but maximum class size could be much larger (for example, in 2019, maximum class size reached 24 couples)	• Facilitated online workshops once a week via Zoom • Updated facilitation style and participant etiquette guides for virtual program delivery • Targeted reduced class size (about 3 to 5 couples to accommodate the virtual setting (class size averaged about 7 couples)
Retention	• Issued each member of the couple a $10 gift card for attending the first two sessions and a $25 gift card for attending all five sessions • Offered flexible make-up options, including video recordings and the ability to attend on a different day of the week	• Issued each member of the couple a $20 gift card for attending the first two sessions and a $50 gift card for attending all five sessions • Offered flexible make-up options, including video recordings and the ability to virtually attend on a different day of the week (expanding to allow participants to attend in any county served) • Moved classes to 7:00 p.m. instead of 6:30 p.m. in response to participants' requests to start later so they could put their children to bed first • Sent weekly reminders via email about participants' upcoming workshop session

Category	In-person program design and implementation (January 2017 to March 2020)	Virtual program design and implementation (May 2020 to August 2020)
Training and supervision	• Held a two-day in-person training for new instructors • Held weekly conference calls with the full project team • Instructors submitted weekly reports and self-assessments • All program staff met in person once a year	• Held a two-hour meeting every week for six weeks before launching to train instructors on virtual facilitation • Held weekly virtual calls with the full project team • Instructors submitted weekly recordings of practice and then live workshop sessions and received written and oral feedback from leadership and other instructors • Offered ongoing, personalized support to instructors (e.g., on technology, virtual facilitation techniques, challenges faced)

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