

TIP SHEET: FACILITATING VIRTUAL TRAININGS

YDEKC is dedicated to building interactive, inclusive learning spaces. Creating these spaces in a virtual environment presents special challenges. Below are some tips for conducting trainings online.

GENERAL PRINCIPLES FOR CREATING INCLUSIVE ONLINE SPACES

- **Be yourself.** Although it can be difficult at first, it is important to let your personality come through online. This will make others more comfortable and will increase engagement. Start off your session with a personal anecdote to set the scene, and try to allow room for spontaneity.
- **Take time to build community.** Give people a chance to get to know one another, just as you would in person. Encourage participants to enable video if possible, and provide time for a round of introductions. If your technology permits, create “breakout rooms” for larger groups.
- **Learn (and teach) the technology.** Whatever technology you decide to use, acquaint yourself with its capabilities in advance, and orient participants to the platform. Also keep in mind that participants will have varying levels of experience with technology, so try to offer support in ways that do not create discomfort.
- **Embrace imperfection.** Even with the best preparation, things can and probably will go wrong. It’s okay; give yourself and others grace. Allow yourself to be vulnerable, and acknowledge that we are all learning together.

ADAPTING YOUR CONTENT TO AN ONLINE ENVIRONMENT

- **Pare it down.** Even if your content is highly engaging, your participants will have a shorter attention span online. Keep your session short (90 minutes or less) and your content lean.
- **Keep it relevant.** As with any training, participants will be most receptive to content that speaks to their interests and experiences. Keep your audience at the forefront of your planning.
- **Incorporate (group) activities.** Provide participants with many opportunities to engage and interact. Some platforms allow for group whiteboards or small group conversations. Even if yours does not, give participants a chance to speak. Encourage participants to contribute in the chat box so that there are multiple ways to participate.
- **Work with (rather than against) the technology.** Learn and use the parameters of your technology. If your capabilities are basic, keep things simple. And know that you will not be able to replicate an in-person experience online.

PREPARING FOR A VIRTUAL TRAINING SESSION

- **Clarify expectations for attendees.** Let people know about the participation requirements in advance. If people will need to have access to a particular platform, or if they will need to enable video, let them know well in advance.
- **Provide options.** In a world where access to technology is inequitable and unpredictable, try to provide reasonable options to participants who will be limited to joining by phone or who will not have the bandwidth to stream video. Provide materials in multiple ways, and describe any visuals you are using during the session so that those without visual access can follow along.
- **Send out materials in advance.** This will allow your participants to prepare in a way that suits them. If you would like participants to read something in advance or download handouts that you will work with during the session, be clear about that. This will enable you to use your time together in the way that is most productive.

- **Practice the technology.** Familiarizing yourself with your platform will not eliminate the possibility of technical difficulties, but it will make you better prepared to address them.
- **Prepare, but don't rehearse.** While it is important to know your content and your platform, it will be more difficult to come across as authentic if your session is overly scripted or rehearsed.

FACILITATING A VIRTUAL TRAINING SESSION

- **Create a warm welcome to the virtual space.** The first few minutes of an online session can be awkward, especially if you are waiting for people to join. Giving people something to do while they wait can help to relieve this awkwardness. One idea is to have a slide up that asks participants to introduce themselves in the chat box, or share a learning goal they have for the day.
- **Designate a co-pilot.** It is difficult if not impossible to facilitate effectively while also running the technology platform, monitoring the chat box, and responding to technical issues. Recruit someone else, even a willing participant, to fill these additional roles.
- **Orient participants to the technology.** Take a few minutes to walk through the technology you will be using, and how you will be using it. Show participants how to mute/unmute, activate/de-activate their camera, and add to the chat box. If the online format is new to you, let participants know that you are learning along with them.
- **Make community norms explicit.** Will you be muting all participants or will they need to mute themselves when they are not talking? How can participants let you know when they have a question or comment? Will you use a set speaking order to ensure that everyone has a chance to contribute? Make this clear up front.
- **Share your goals and agenda.** Be up front about your learning objectives for the session, and how you hope to proceed through the session. This will help your participants to focus their efforts. Take the time to reflect at the end of the session as well.
- **Mix things up.** Variety is important, and yet you have fewer options for creating variety in an online setting. Be intentional about giving people different ways to engage throughout your session. Also try to mix up your visuals, and challenge yourself not to speak for more than 3-5 minutes at a time without some form of interactivity.

SUSTAINING RELATIONSHIPS IN A VIRTUAL WORLD

- **Send post-event communication.** Send a follow-up as soon as you can. This might include a session evaluation (if applicable) or a link to a recording. Include a thank you and a personal takeaway from the session.
- **Provide opportunities for follow-up.** Let your participants know how they can stay in touch with you, and how you will stay in touch with them. If your group is ongoing, this might mean that you will check in before the next session. Even if your session is a one-time offering, you can follow up with information about other opportunities.

FOR MORE INFORMATION

Leading Groups Online, by Jeanne Rewa and Daniel Hunter

<http://www.leadinggroupsonline.org/>

This guide provides practical tips for online facilitation from experienced facilitators. Includes activity ideas and sample slides.