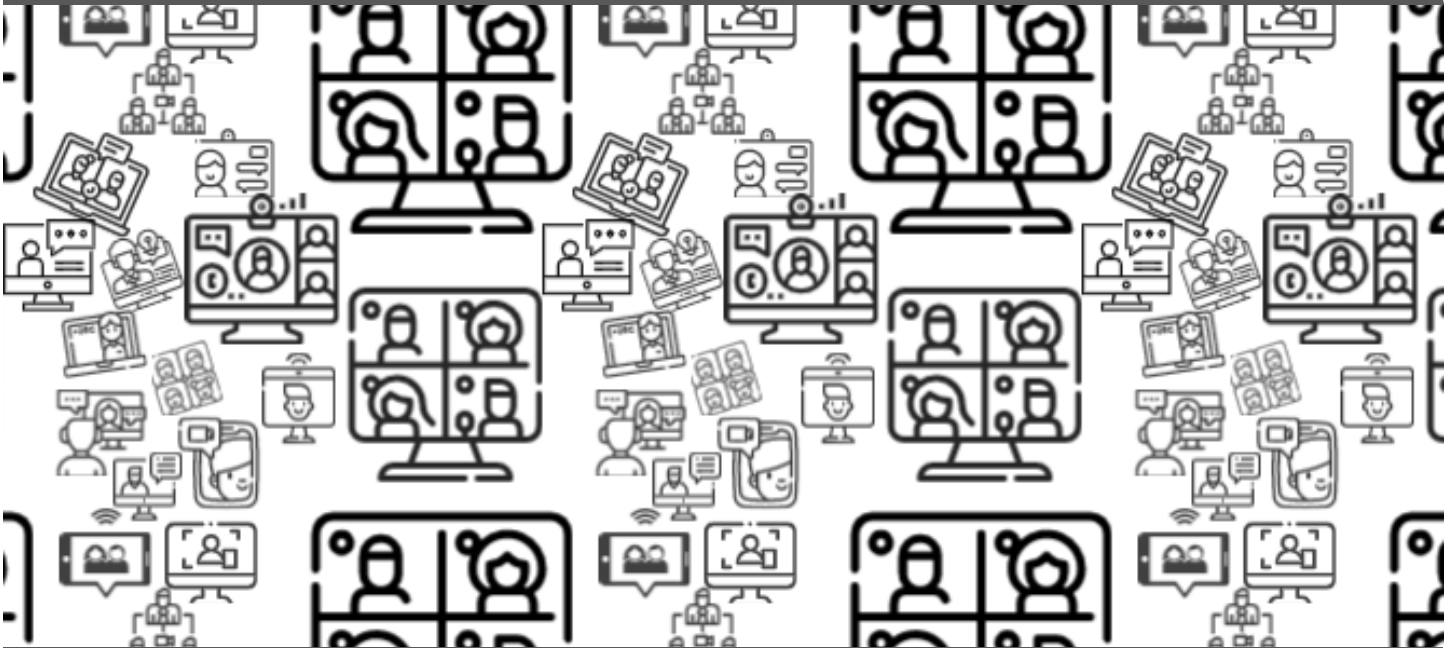


VIRTUAL FACILITATOR



PLAYBOOK

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12	TOOLS & RESOURCES	Access links to existing resources that support the planning and delivery of presenting to groups online.
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An introduction

This is a basic introduction to effectively leading online meetings, community building and learning events. The content in this playbook is useful to a wide range of people who are leading online spaces, whether you call it training, a meeting, or a session, and whether you call the people who attend participants, students, members or colleagues.

Because this virtual facilitator playbook is being written during a global pandemic, you'll also find tips and suggestions about how to support people psychologically in this moment. You'll find a suite of resources that includes appropriate activities, concrete ideas and practices in the always-useful PITW #50, "We must never lose the human aspect of what we are doing" – we attempt to honor people's emotional state as much as possible.

Let's name a few things right away:

- **It's not the same.** The distractions, mental load and physical distance makes it hard to stay connected.
- **People don't do their best learning while under stress.** At any given time, it's expected that individuals are experiencing their own personal challenges (housing, safety, hunger, financial stress, death, etc.). But in our current coronavirus pandemic, a higher percentage of participants will be in a heightened state of stress. The range of stress might vary dramatically based on local and community circumstances.
- **You have your own learning curve to facilitate on a new electronic platform.** It's a whole new game to get a sense of a virtual group, adjust to presenting in an empty room, and deliver engaging content. Developing this skill takes time and practice and time is scarce and taking new risks might feel difficult.

Because of that, here are some suggestions:

- **Look at your content and goals and expect to do less.** It's important to hold space for processing, clarification, pausing and demonstrating. One of the biggest mistakes you can make is trying to utilize every moment online by cramming in too much content. Racing through things online will cause you to lose more people and when people are confused, they will disconnect and tend to passively participate in the virtual space.
- **Create space for human connection.** This might mean you need to adjust your pacing, priorities, frequency of meetings and content. Make sure that you hold time in your virtual spaces to connect as people in small groups and one-on-one dialogue frequently.
- **Be gracious with yourself.** Laugh at your technology mistakes and be gentle about the inevitable technological snafus. Modeling lightness will be a gift to everyone.

In this moment many of us are making very big changes in the ways we are connecting and working with each other. So much of what we already know from working in person we can (and should) bring into our online spaces, but also there is so much that is different and new!

Even under ideal circumstances, facilitating online can be a challenge. Give yourself – and others – the grace and space to not be perfect. Learn, make mistakes and try things out. Be caring, compassionate, and patient.

A Couple Quick Reminders:

- **Look at your content goals and expect to do less.** Hold space to process, pause and demonstrate.
- **Create space for human connection.** This is necessary for whole group, small group and 1:1 virtual spaces.
- **Be gracious with yourself.** Laugh at your mistakes and embrace the tech snafus.



an·dra·go·gy

the method and practice of teaching adult learners.

PRINCIPLES OF VIRTUAL LEARNING

Adapted from [Teach for All](#) and [Leading Groups Online](#)
Read more about andragogy, [here](#).

ADULTS LEARN BEST WHEN THEY:

Feel **included** with language, technology, and cultural relevance in mind.

We do this in a virtual setting by:

- Anticipating the needs of learners, given their diverse learning styles, languages, cultures, personalities, and access to technology.
- Determining ways to engage learners who were “left out” of a learning experience by creating artifacts or new learning experiences for those who missed the original experience.

Trust the facilitator and peer learners

- Committing time before or during the learning experience to help participants get to know one another and the facilitator in order to build trust.
- Determining and implementing ways to build trust with the facilitator and with each other before the learning experience takes place.

Use technology that enhances the learning

- Ensuring everyone is comfortable on the technology before getting started.
- Researching technologies and practicing their use from the learner’s perspective for every learning experience.
- Anticipating “technology fails” during learning experiences in order to troubleshoot quickly with new methods during a live learning experience
- Instilling a mindset that virtual has many advantages to in-person settings. One benefit is the ability to engage normally ‘quiet’ voices -- often this includes those who feel they have less ‘power’ to speak up in an in-person event or meeting.

Own their learning and feel accountable to apply what they learn

- De-centering ourselves as facilitators and allowing learners to determine their own learning outcomes.
- Ensuring that what they are learning in an experience is immediately relevant and applicable to their work. They can act right away.
- Finding opportunities for learners to create/co-create and lead/co-lead virtual learning experiences or breakout sessions within virtual learning experiences.
- Helping learners self-organize virtually to enhance their learning experiences. This includes self-organizing by language, topic, skill level, or geography through a technology of their choice. This also includes organizing peer accountability groups and partnerships.
- Supporting learners while they take next steps from their learning experiences. This includes helping learners to facilitate sessions for additional learners or establish self-organized learning groups. It also includes encouraging learners to continue to discuss topics related to their learning and identify new skill-gaps after the learning experience.

Feel included



Trust the community



Technology enhances learning



Own their learning



Guidance for Facilitating Virtual Adult Learning Spaces



Be you.

Leading online is not entirely unlike teaching or facilitating in person. We have yet to find a good educator who can't also teach online. You can do this.

So, take a breath and remind yourself of whatever skills you already bring to the table: compassion, a relationship with students, mastery of the content, a sense of humor, gravitas, fluidity, compelling stories. Maybe you happen to be the kind of person who really cares — or handles fear well — or is graceful under stress — or is human. Share that!

You may already know the group. Even if you don't know each person, whatever you know about group dynamics is still true. The group will still have tension, issues of social identity and rank, varied content knowledge, and different people's motivations. Everything you know about how individuals learn still applies. Everything you know about the state of people in crisis is still true.

Practice the technology.



Whatever platform you use to connect, you and the participants may be learning the technology for the first time, too. If you can, we strongly recommend practicing the technology you'll be using ahead of time.

- If it doesn't work smoothly, lightly laugh at it and note how you could do it differently next time.

Set up your video.

- Make sure your face can be seen. If you're on a phone, find a place to put it down so it's stable.
- Make sure you don't have strong light coming from behind you. Consider the background, like a plain wall or view of your house with minimal distractions.

Try out the system.

- Make sure you can log-in. If you're using headphones (strongly recommended!) or external monitors, test them.
- Your group will also need to practice — so plan to teach the technology during the sessions.

Start with the simplest tools.

- For example, in video conferencing, beginning activities might have people share out loud or in the chat box.
- Start with the tools that are most straightforward and helpful.

Offer people a way to get help.

- Whenever possible, have someone designated as a tech support person. That could be a co-facilitator or a member of the group.

Explain new tools carefully and check for understanding.

- The first time you use a tool, explain how it will look to them on screen, what they must do, and how to get help.

Acknowledge it's an experiment.

- People can also show a lot of compassion when we explain that we're going to try an experiment. "I haven't done this before, but I'm hoping we can try a go-around online..."

Minimize people's multitasking.

People on screens are often used to jumping from window-to-window to search the web, play music, and respond to a message. The temptation and likelihood of participants getting distracted or multitasking is significantly higher than when you are in-person. This challenge should not be underestimated. It impacts every aspect of how we lead online.



Set the expectation before your session.

In emails, calendar invitations or posts reminding people about your online session, encourage participants to take steps that will help them have as few distractions as possible. For example, say "When connecting, please join from the quietest place with the strongest internet connection available. If possible, wear headphones or a headset during the session."

Set the tone at the beginning of your session.

Naming that distractions are a challenge can help participants pay attention during the session. Even better: invite everyone to remove distractions at the beginning of a session. You can do this in a gentle, playful way. "Prepare yourself to be fully present during the session. Do you need to remove a pet from the room or hide your mobile phone? We won't be using email during this session, so you can close your email inbox, too, if it's open!"

Use the distraction.

Are people going to be on their phones? Then encourage them to use the phone to text answers to you. Or if people are going to be surfing the web – then challenge them: "Today we're going to learn about Pythagoras' Theorem, I'll give you 5 minutes to google it and try to figure out what it is and how it is spelled. Go!"

Engage Frequently and in varied ways.

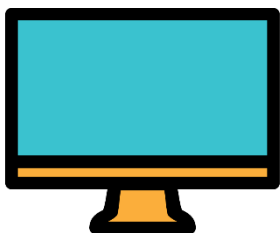
The very best way to keep people from going off into other things is to keep them engaged with your session. *Ask questions, switch up activities (not just discussions or lectures), have people journal and draw.* If you engage in ways that are fun, it will also make them want to stay focused on your session rather than do something else.

As a general rule, aim not to have anyone talk for more than 3-5 minutes at a time without pausing for at least a simple engagement of participants.

Don't always engage everyone the same way. Prioritize engagement when you connect live.

For example, don't always ask yes/no chat questions. People will start to lose interest, especially those who don't prefer that method. For best results, use a variety of engagement types that work for different communication styles and learning styles, and give people options.

Check to see if there is information sharing that you could move to outside your live sessions. For example, could you record a video, share a document, or use email? Keep in mind the physical and mental challenges of being together live online. Do your best to use this time only for what is most important to do together live, like supporting each other, practicing skills, collaborating, making decisions, social motivation, etc.



Manage energy.

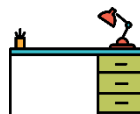
It is tiring to stare at a screen. It is a heavy mental load. It's true for you – and it's true for everyone in your online groups.

Give yourself a real break between sessions.



Leading online is double challenging because you have the mental load of staring at the screen while multi-tasking to facilitate, read the group, be on a new platform, etc. To care for yourself, plan at least 30-minutes for walking or physically taking a break.

Schedule breaks.



For a 90-minute session, take as little as 30 seconds to invite people to stretch. For a 2-hour session or more, give 5-10 minutes in the middle for people to walk away from their computer and come back. For an online event with a lot of sessions, thirty-minutes between sessions is recommended.

Consciously check in with your body during sessions and invite others to join you.



Stretch or reposition yourself, close your eyes or look away from your screen. You can even throw on some music and invite everyone to a short dance party.

Limit session length.



If you can help it, we advise that sessions be no more than two hours of consecutive connection time. One and a half hours at a time is ideal when you have a lot of participants who are new to the technology. If you must go through the day, break it up.

Ask for help.

- ✓ **Facilitate:** Listening, asking questions, explaining the next activity.
- ✓ **Tech tasks:** Screen sharing, explaining technology, recording, sharing links in the chat box.
- ✓ **Tracking the group:** Watching for raised hands, reading the chat box, answering any direct messages.
- ✓ **Note taking:** Summarizing key ideas, flagging questions, tracking attendance and noting information you need to follow up about or circle back to with the group later.

Consider which of these you can get help with – training facilitation sessions with a colleague or recruiting a volunteer or even a member of the group to assist with tech tasks, tracking or note taking.



Track participation.

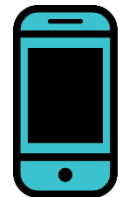
A common challenge in leading online is that we end up in a one-way conversation. We are talking at people, but don't know whether they are learning, whether they agree or disagree, or even if they are still paying attention! Reading people online is more challenging than in person, but it is not impossible.

Many online facilitators often try to squeeze every ounce of information from people's videos. You can sometimes see if people have their heads turned elsewhere, are typing at the computer, or are smiling/frowning/laughing. But what you see from people's video ends up being guess work – and can be very inaccurate. Is someone looking away because they are bored, someone walked in, or they're being thoughtful?

Include polls or spectrums to gauge responses. Use a live polling tool or ask people to share in the chat or out loud the answer to a simple question or two. You could have multiple choice options visible on screen and read out loud so people can answer simply "A" "B" "C" etc.

Use general check-in questions. "Take a moment to type in the chat: is this clear so far? What's still not clear?"

Check in with people on the phone (especially for tech difficulties).



For all the engagement methods, it's important to pay attention to the people who may get marginalized because of the tech they're using (like, it's harder to use a phone and do interactive stuff, or maybe they're not on video, or have low bandwidth...).

How you do this may differ according to how large your group is and whether it is an engagement moment where you want to hear from everyone. In general, we suggest inviting participation from people on the phone up front and at the end of an engagement and leaving a good pause.

For example:

"Does anyone have any questions before we move on? You can type in the chat or if you are on the phone or prefer to share out loud, you can come off mute. [Get some responses in the chat.]

Okay, I haven't heard from several people on the phone, so I just want to check to see if you have any more questions on the phone before we continue. I'll pause a few moments so you can come off mute if needed... [pause at least 5 seconds].

Oppression is compounded by technology.

If you end up tracking participation, you will likely see dynamics of oppression play out. Marginalized groups and those with oppressed identities often tend to participate less frequently.

This can become compounded by technology in three ways:

- Oppression hammers people's confidence. As a result, folks' confidence in navigating a novel online space may be challenging. The risk of shaming and exposing ignorance may be much higher.
- People with fewer resources have less access to high end tech and a dedicated space to work from.
- People in money-poor areas have largely been abandoned by internet providers. That means people may have inferior internet access. Without high end high-speed internet, people's connection may be spotty.

Don't always pick the quickest response.

Instead of picking the first person to say, "I have an answer," look for opportunities to support less-heard voices. Make a point of being invitational.

Make sure all people — no matter their tech — can participate fully.

Try to always provide alternative options for participation. If someone cannot be on video, make sure there's a way to call-in. If people are calling in, give dedicated space for them to participate during activities and make sure the chat is read aloud. For groups across time zones, this means making sure you don't just offer sessions at times which are good for some people but bad for the same people waking up early, going to sleep late or working through their regular mealtimes.

Set people up for success.

Another way to cause shame is using right/wrong questions and telling people they're wrong in front of everyone. This can inflame shame. For example, math professors are finding "observation/noticing" methods more effective in their teaching. At the simplest, rather than asking "who doesn't understand this" you can ask "what haven't I explained clearly." This is a pedagogical belief we hold dear — and even more important to do when being online makes it harder to see someone slip into shame.



Let people know you "see" them.

It's one thing to track people. But the more you make it clear that you are reading the group in an ongoing way, the more that people will feel "seen." The more seen people feel, the more they are likely to engage. They are also more likely to send you clear nonverbal signals through their web camera when they get the signal that someone is looking back through their screen.

Here are a few examples of what those signals might look like. The facilitator says:

- "It looks like only about half the group has shared ideas in the chat box. If anyone is having trouble with the chat, let us know, or you can share out loud."
- "I see [name] that you just came off mute. Is there something you'd like to add?"
- "I see a lot of people are saying 'yes' in the chat box, so yes, let's shift to talking about the second topic."
- "I see a lot of heads down on the web cameras, so I'm going to give you a little more time to journal."
- "Everyone has shared except [name] and [name] who are on the phone. Would you like to share, too?"
- "It looks like [name] has stepped away, so we'll come back to them when they're back."
- "Welcome [name], we're just in the middle of sharing one thing we have done that's fun today. [name], [name], and [name] haven't gone yet." This takes attention but you will be well-rewarded by the effort.



Offer the space to support people.

During this crisis, people are going to have major life issues in front of them. We cannot be sure that our students or participants are not facing dire circumstances. Especially with on-going groups, create methods to provide checks-ins for people and even mutual assistance.

Have people write how they are doing on a scale of 1-10.



Use time outside of the sessions to check in with people with low numbers.

Create asynchronous spaces for support.



In a safer group, you or your community might have an ongoing list where people can post “Things I have to offer” and “Things I need” — a way to support mutual aid.



Open with moments of silence or guided meditations.

Consider using the Ten Percent app for resources around meditation and wellness.



Connect the content to people’s currently lived experiences.

Request that participants write down one big thing going on in their live and share in small groups.

Release yourself and your group of perfection.

We believe in high standards and excellence in performance. We applaud you if you’re the type of person shooting for perfection under all the challenges of this moment. But if you are, then you also need to be ready to aim high and miss.

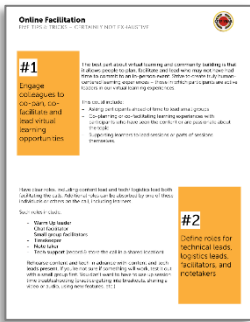
If you think that your job as a leader of online spaces is to prevent any tech problems from happening, let yourself off the hook right now. There are so many factors that impact our online spaces that are outside of our control (as just one example, bandwidth limitations of rural areas). Prepare yourself for the reality that there will be bumps in the road.

There are things you can do to minimize a variety of problems, but the most important thing you can do is take a deep breath and prepare yourself to stay calm and do your best to support your group through whatever will inevitably come up.

Social distancing and forcibly being confined to home can be challenging. People are struggling, so creating new ways to stay connected is crucial to keeping us strong, mentally and physically healthy, well-balanced, and grounded. Patience, caring, and loving is our most important task, so let’s model it with wisdom and intention.

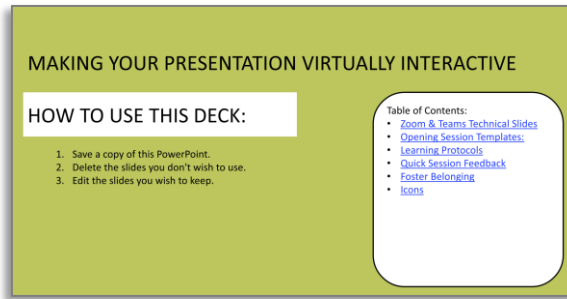
Tools & Resources

Online Facilitation Tips



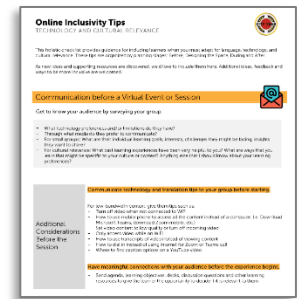
Practice these 5 online facilitation tips to create an inclusive, community-centered online learning experience.

Virtual Facilitation Slide Templates



This PPT deck is a collection of slides from around the network that you can adapt for your local planning needs. You'll find templates for technical guidance, opening sessions, learning protocols, fostering belonging, gathering feedback and hundreds of icons.

Online Inclusivity Tips



This holistic checklist provides guidance for including learners when you must adapt for language, technology, and cultural relevance.

FY21 ACM L&E Map Overview



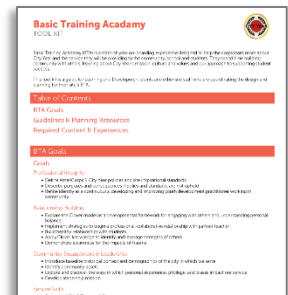
The ACM Learning and Experience Map supports sites in delivering AmeriCorps Member learning by offering guidance in developing a year-long, programmatic learning experience. This adapted map articulates the new and updated learning sessions and experiences designed in response to COVID-19.

ACM L&E Map



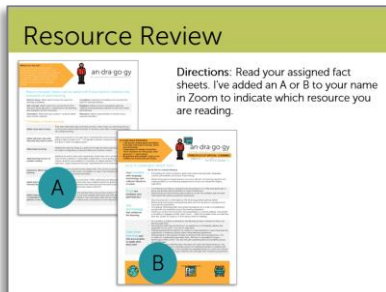
The ACM L&E Map is intended to serve as a guide, outlining the components and flow of a programmatic learning experience at City Year for AmeriCorps Members. A new strand has been added to the ACM L&E Map that filters by virtual learning sessions to quickly access updated materials for online learning.

FY21 Adapted BTA Toolkit



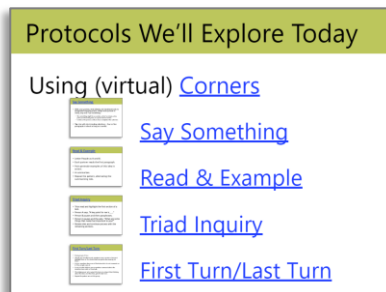
This tool kit includes several bundled resources that will help you plan and execute both a virtual and hybrid delivery of BTA.

Andragogy & Learning Design



Use this session to build your team's understanding of andragogy and learning design.

Group Processing Techniques and Protocols



Continue to deepen your team's understanding of adult learning principles through this 60-minute virtual session exploring a handful of group processing protocols.

Remote Community Meetings



Community meetings can be incredibly meaningful and innovative when done virtually. Here's an example of one remote team's remote community meeting structure.



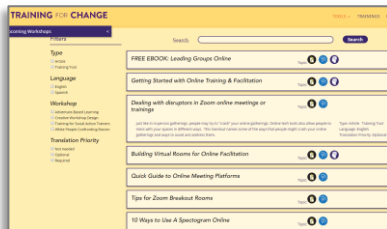
Leading Groups Online

Significant portions of this virtual facilitator playbook were taken directly from this resource. Jeanne Rewa and Daniel Hunter swiftly wrote this booklet for this moment. The coronavirus pandemic has created new challenges for facilitators and educators. Across the globe, people are being asked to lead groups online: teachers, trainers, professors, event managers, organizers, activists.



Teach for All

Several sections of this virtual facilitator playbook were taken directly from this resource. This site was also used to design example templates and tips to help you create strong engaging tools and virtual learning experiences for adults.



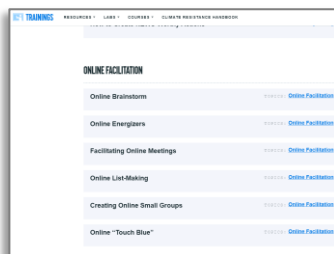
Training for Change

Several resources linked in this virtual facilitator playbook incorporate elements and suggestions from the resources designed by Training for Change.



Finding Steady Ground

This site was referenced to consider thoughtful ways to strengthen our spirits to resist and thrive in these times.



350.org

This site was referenced to generate additional ideas and tools for leading virtual group meetings and community building.