

Enhancing Virtual Engagement

Workshop delivered on January 13, 2022



ENHANCING VIRTUAL ENGAGEMENT

January 13, 2022 – Training | 1:30 – 3:30pm [ET]



Presented by:



ARMAN LORZ



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INTRODUCTIONS

Please share in the chat:

1. A greeting
2. Your preferred pronouns
3. If you consider yourself more of a facilitator, trainer, or coach



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By the end of this session, participants will be able to:

- Explain the difference between facilitating, training, and coaching
- Reflect on the learning and engagement theories applicable to facilitation
- Describe effective ways to increase engagement through virtual facilitation
- Explore best practices of virtual facilitation
- Plan the integration of at least one new practice and one new skill into their next virtual facilitation



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AGENDA

TODAY'S CONTENT

- I. Welcome and introductions
- II. Objectives
- III. Facilitation, training, and coaching
- IV. Learning and engagement theories
- V. Engaging participants through virtual sessions
- VI. Commitment to accomplish before your next session
- VII. Adjourn and Evaluation



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AVOID THAT, INSTEAD DO THIS



- 1 Being stiff/robotic; **step up your gestures**
- 2 Looking away; **make eye contact**
- 3 Going on and on; **keep it short, sweet, and moving**
- 4 Winging it; **do a dry run**
- 5 Lecturing; **create an experience**

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WHAT'S THE DIFFERENCE?



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FACILITATING - TRAINING - COACHING

Facilitating: Making an action or process easy or easier.



- Advanced preparation and organization
- Clear communication
- Active listening
- Asking questions
- Timekeeping
- Establishing a psychologically safe environment for sharing
- Creating focus amongst the group
- Unbiased objectivity
- Technology skills

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FACILITATING - TRAINING - COACHING

Training: Facilitating the process of learning the skills needed to do a job.



- Facilitation skills
- Advance research skills
- Creativity
- Enthusiasm for learning
- Observation
- Experience
- Adaptability
- Ability to assess others and deliver critical recommendations for improvement
- Resourceful

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FACILITATING - TRAINING - COACHING

Coaching: A form of development in which an experienced person supports a learner in achieving a specific goal.



- Facilitation and training skills
- Responsibility
- Creativity
- Cheerfulness
- Courage
- Emotional stability
- Accuracy
- Erudite and diversified
- Possess the quality of self-improvement
- Have an active life position.

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NOW THAT YOU KNOW THE DIFFERENCE...



Please take a look at  [HO2 - Facilitation Style and Preferences](#)

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LEARNING & ENGAGEMENT THEORIES

- Social Emotional Learning
- Adult Learning Theories
- Motivational Interviewing
- Strengths-Based Approach
- Diffusion of Innovation



Go to www.menti.com and use the code **5968 9243**



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SOCIAL EMOTIONAL LEARNING



The process through which all young people and adults acquire and apply the knowledge, skills, and attitudes to develop healthy identities, manage emotions and achieve personal and collective goals, feel and show empathy for others, establish and maintain supportive relationships, and make responsible and caring decisions.



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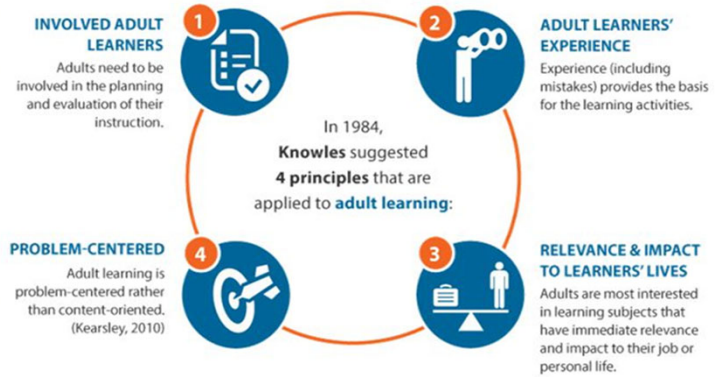
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ADULT LEARNING THEORIES

The methods and processes by which adults learn and involves five assumptions of adult learners:

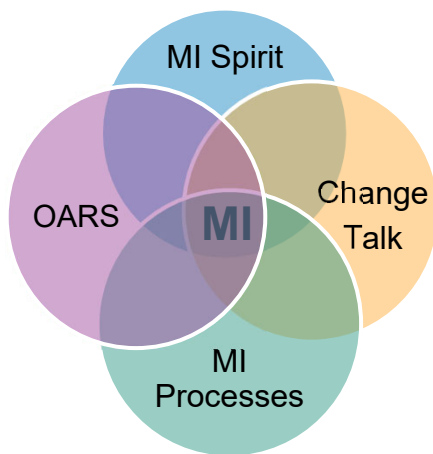
- 1: self-concept
- 2: experience
- 3: readiness to learn
- 4: orientation to learning
- 5: motivation to learn



Please take a look at  [HO3 - Adult Learning Principles](#)

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MOTIVATIONAL INTERVIEWING



A counseling method that helps people resolve ambivalent feelings and insecurities to find the internal motivation they need to change a specific behavior. It is a practical, empathetic, and short-term process that takes into consideration how difficult it is to make life changes.

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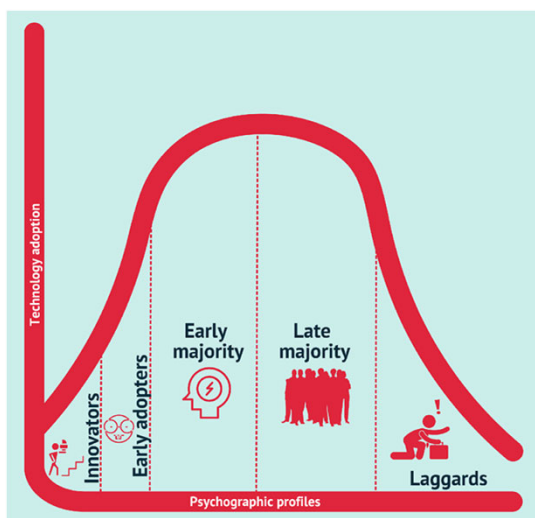
STRENGTHS BASED APPROACH

An approach that focuses and builds on individuals' strengths (including personal strengths and social and community networks), specifically seeing them as resourceful and resilient when they are in adverse conditions.



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DIFFUSION OF INNOVATION



This theory focuses on how, why, and at what rate new ideas and technology spread. It states that diffusion is the process by which an innovation is communicated over time in a social system and is influenced by:

- 1- the innovation itself
- 2- communication channels
- 3- time
- 4- a social system

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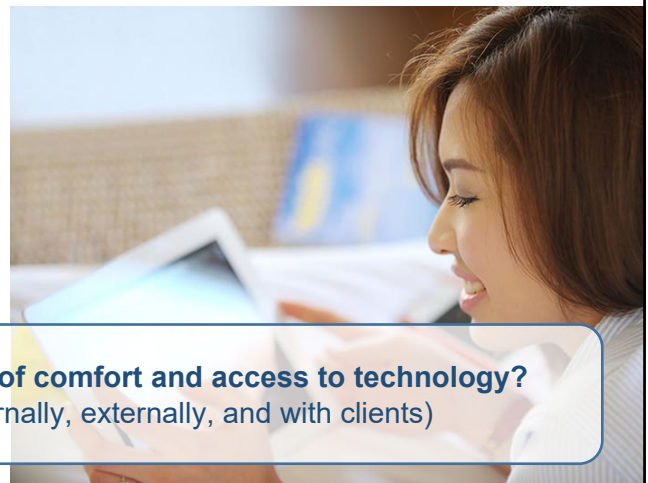
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QUESTION TIME



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ADULTS AND TECHNOLOGY



How do you address differing levels of comfort and access to technology?
(this includes when working internally, externally, and with clients)



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HOW ENGAGING WOULD YOU SAY YOUR VIRTUAL SESSIONS ARE?



1= Oh man, I need help!

Pff! I could write the book! =10



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VIRTUAL ENGAGEMENT IN SESSIONS



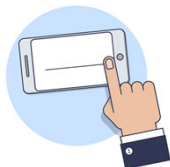
Planning



Internal Collaboration



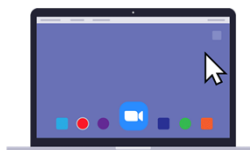
Checklist



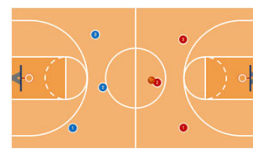
Group Agreements



Balance



Zoom Platform



Best Practices



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Keep your audience engaged

- 1 Determine the **Minimum Viable PowerPoint (MVP)** deck needed and stick to it.
- 2 Help your audience experience an **emotional reaction** the issue at hand within the first 60 seconds
- 3 Share the participation **responsibility** early in the session
- 4 Give your audience **tasks** that they can actively engage in throughout
- 5 Provide participants with meaningful **interactions** every 5-10 minutes











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BEST PRACTICES

-  Establish clear **standard practices** across faculty
-  Familiarize yourself with all the platform **features**
-  Integrate approaches for **equity, diversity, and inclusivity**
-  Conduct **dry runs**
-  Have your notes right below your **camera** lens
-  **Monitor** participants and use active listening
-  Ask participants to **share** reactions, comments, and questions
-  Provide **labels** when sharing links or document through chat

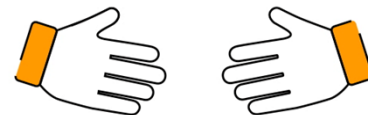








Please take a look at
*HO6 – Best Practices
for Engagement
and Virtual Facilitation*

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COMMITMENT



-  Use the *Facilitation Style & Preferences* tool to list your strengths and opportunities.
-  Revisit this recording and handouts to reinforce or spark ideas for engagement.
-  Meet with your team to discuss collaborative and reciprocal learning strategies.
-  Identify at least one item from the Zoom and Adult Learning Principles tools to apply.
-  Practice doing any of the recommendations before the next session you deliver.
-  With your team, develop a procedure for standard practices with clear, equitable, and inclusive roles and responsibilities among all faculty.

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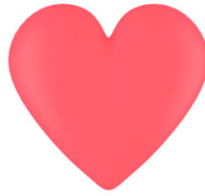
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HEAD, HEART, and FEET



Share something you learned



Share something that made you feel differently



Share something you will walk away with



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TRAINING EVALUATION

Provide relevant details

Enter complete sentences

Announce when you submit it



Click on the link in the chat to answer a few questions about this training

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Answering Questions

Please take a look at
*H07 – Resource Index
for Facilitation
and Engagement*

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Tools and Resources

7 Skills Your Instructors and Trainers Must Have:
<https://hrdailyadvisor.blr.com/2019/03/22/7-skills-your-instructors-and-trainers-must-have/>

Training the Trainer: Essential Skills and Tools: <https://www.alphalearn.com/training-the-trainer-essential-skills-and-tools/>

What is Coaching: <https://mentoringgroup.com/what-is-coaching.html>

Social and Emotional Learning Theory: <https://casel.org/what-is-sel/>

What is Adult Learning Theory?: <https://www.neit.edu/blog/what-is-adult-learning-theory>

Motivational Interviewing: <https://www.psychologytoday.com/us/therapy-types/motivational-interviewing>



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Tools and Resources

Motivational Interviewing: <https://motivationalinterviewing.org/understanding-motivational-interviewing>

What is a Strengths Based Approach? (Incl. Activities and Examples):
<https://positivepsychology.com/strengths-based-interventions/>

Diffusion Of Innovation Theory And Why It Matters: <https://fourweekmba.com/diffusion-of-innovation-theory-and-why-it-matters/>

How to Ace A Virtual Presentation: <https://www.youtube.com/watch?v=atLvsjllsOI>

How to Get People to Actually Participate in Virtual Meetings:
<https://hbr.org/2020/03/how-to-get-people-to-actually-participate-in-virtual-meetings>



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Tools and Resources

Make your body language your superpower:
<https://www.youtube.com/watch?v=cFLjudWTuGQ>



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A decorative graphic on the left side of the page. It features a large green circle, a smaller purple circle above it, and an orange circle below the green one. To the right of these circles are two overlapping document icons: one with a red border and one with a blue border. Both icons contain horizontal lines representing text.

Handouts

FACILITATION *Style* AND Preferences

Complete the following sentences and share with your co-facilitators to determine how you will handle certain situations and provide support to each other

NAME:

TRAINING STYLE

1. Some things I do particularly well in training are...	
2. Some areas that I feel least confident and may need additional support are...	
3. My favorite facilitation strategy is...	
4. My training pace is...	
5. When a participant talks too much, I usually...	
6. When there is conflict in the group, I usually...	
7. I feel uneasy when...	
8. I am at my best as a trainer when...	

FACILITATION *Style* AND Preferences

CO-TRAINING SUPPORT PREFERENCES	
9. I prefer when my co-facilitator interjects or adds information when I am talking by...	
10. My signal to ask for my co facilitator's help is...	
11. I am comfortable taking the lead on...	
12. I am less comfortable with ...	
13. I would like some support from my co-facilitator when...	
14. I prefer to give and receive feedback by...	

The style that I am strongest at (where I recognize most of my skills) is...

- Facilitating:** Making an action or process easy or easier. It requires unbiased objectivity, advanced preparation and organization, clear communication, active listening, asking questions, timekeeping, establishing a psychologically safe environment for sharing, creating focus amongst the group, and technology skills, among other skills.
- Training:** Guiding the process of learning the skills needed to do a job. It requires facilitation skills, advanced research skills, creativity, enthusiasm for learning, observation, experience, adaptability, resourcefulness, ability to assess others and deliver critical recommendations for improvement, among other skills.
- Coaching:** A form of development in which an experienced person supports a learner in achieving a specific goal. It requires facilitation and training skills, responsibility, creativity, cheerfulness, courage, emotional stability, accuracy, being erudite and diversified, possessing the quality of self-improvement, having an active life position, among others.

ADULT Learning PRINCIPLES

To effectively transmit information, either through facilitation, coaching, a dedicated training program, or a more general learning effort, adult learning principles should be utilized considering the implications for learners and the implications for teaching.

PRINCIPLE	IMPLICATIONS FOR LEARNERS	IMPLICATIONS FOR TEACHING
Adults bring considerable experience with them.	They wish to speak and participate in and contribute to the training. They dislike long lectures and one-way communication.	<ul style="list-style-type: none"> ● Share personal experiences when asked and when appropriate ● Encourage participation by all Learners ● Ask about Learners' experiences ● Encourage Learners to share experiences with each other
Adults learn with emotional impact.	The materials and the method of presentation must catch their interest, touch their feelings, and stir creative and independent thought.	<ul style="list-style-type: none"> ● Promptly address Learners' concerns, conflicts or difficulties ● Use a variety of educational methods (discussions, roleplays, videos, etc.) ● Use colorful overheads and slides during presentations ● Use colorful newsprints and markers
Adults want courses that focus on real-life problems and tasks rather than academic materials.	A strong how-to focus is desired. They become restless if their time is being wasted.	<ul style="list-style-type: none"> ● Modify teaching plan to accommodate Learner experiences ● Process roleplays in a manner that reflect real life ● Use real-life problems and examples ● Ask Learners to relate their own stories ● Minimize the use of statistics
Adults learn with relevance.	The learning must connect clearly and directly with tasks faced by the Learner on the job or in life.	<ul style="list-style-type: none"> ● Follow up on answers to questions when they don't know ● Provide background and supporting evidence for course content ● Modify the teaching plan to accommodate Learner experiences

ADULT Learning PRINCIPLES

<p>Adults learn best in comfortable settings.</p>	<p>Physical discomfort will distract or create negative feelings.</p>	<ul style="list-style-type: none"> ● Allow frequent breaks during instructional time ● Encourage Learners to dress casually or comfortably ● Orient self and Learners to the facility restrooms or virtual features ● Create a classroom set up conducive for Learner interaction and learning
<p>Adults learn when mistakes are honored as well as successes.</p>	<p>People learn a lot from mistakes, and everyone makes them.</p>	<ul style="list-style-type: none"> ● Process by asking what was most difficult or challenging about the exercise or assignment ● Ask Learners what they liked or thought they did well in the exercise or assignment ● Encourage Learners to take risks and try new things
<p>Adults want positive reinforcement of desired behavior and feedback about errors at the moment when they occur.</p>	<p>People feel validated when they receive constructive feedback from an observer.</p>	<ul style="list-style-type: none"> ● Handle unexpected situations with minimal confusion or emotion ● Process after each exercise, activity, or roleplay ● Give praise and encouragement ● Provide specific behavioral observations about errors
<p>Adults are accustomed to being active.</p>	<p>They should be given an opportunity for active participation whenever possible.</p>	<ul style="list-style-type: none"> ● Encourage participation from all ● Allow plenty of time for all activities ● Asks open-ended questions to encourage discussion ● Uses Learners' names to encourage connection to the class
<p>Adults learn with humor.</p>	<p>A little lightness, amusement and fun can keep training from being a grim business.</p>	<ul style="list-style-type: none"> ● Create an enjoyable "participant-centered" atmosphere ● Tell jokes and stories that are appropriate for the audience ● Use props (funny overheads, slides, or toys) when appropriate

When creating any sort of learning program for an organization, these principles should be kept in mind, and learning resources should be developed using them.

VIRTUAL FACILITATION CHECKLIST

Below is an overview of components to review before, during, and after a facilitation session. Utilize this checklist to ensure smooth, comprehensive, and effective virtual facilitations.

Development

- Establish facilitation team roles.
 - Producers
 - Trainer
 - Back up trainer
 - Chat monitor
 - Technology assistance provider for participants
- Set up your station for success (clean desk and arrange monitors, notebooks, and light appropriately.)
- Send appointments. Include hold for presenters for early check in and debrief
- Learn about the participants before facilitation begins (*i.e. successes achieved; implementation steps; challenges, concerns, barriers; topics of interest; tools/resources to share; data; goals for participating in session*).
- Develop annotated session outline with both content and interaction prompts.
- Identify and compile resources to share throughout the session.
- Ensure presentation slides are clean, easy to follow, professional, and effective that include full notes with prompts for presenter, back up, and producer.
- Prepare discussion prompts and questions
- Run a full practice session.
 - Practice delivering the content out loud
 - If following a script, practice how to read it sounding natural
 - Practice interactive elements
 - Ensure that session is timed appropriately
 - Practice Interactive features (anticipate how to handle problems if they arise)
- Develop evaluation of training questions that include open-ended questions about
 - Satisfaction with: content, interactivity, amount of new information
 - Barriers, questions, challenges related to the next session topic

VIRTUAL FACILITATION CHECKLIST



Pre-Session

- Position yourself in a clean, well-lit background, free from distractions (busy decorations, ceiling fans, etc.)
- Position lighting source in front of face
- Position camera at eye-level
- Beware of screen reflection in glasses (remove glasses and increase font size on screen - if appropriate)
- Sit with appropriate posture for strong and clear delivery
- Join session at least 15 minutes before it begins to address last-minute details
- Conduct a technology check
 - Practice logins
 - Video check
 - Audio check
 - Adjust screen and windows in monitor for training delivery
 - One click ready to share content

During Session

- Foster peer-to-peer interaction
- Encourage sharing of practical experiences
- Include action planning, if appropriate
- Use active listening and reflective language
- Spotlight and cheerlead participant successes

Post-Session

- Evaluate the session before ending
- Debrief immediately following the session - allow at least 30 minutes
- Use evaluations to inform structure and content of future sessions

Please mark boxes of the features you feel extremely comfortable and confident using during Zoom video conferences

- Switching from your computer speakers to your headphones and vice versa.
- Assisting a participant in switching to a phone in the middle of a meeting.
- Linking attendees' phone number to their video if they forget to do so.
- Muting attendees when they forget to do so themselves, so we don't interrupt the session and "remind everyone to mute their lines".
- Sharing etiquette about when to be on camera and when to turn it off.
- Uploading a picture to your profile that appears when your camera is off.
- Stopping from disappearing when using virtual backgrounds.
- Making eye contact with your participant while still looking at your notes and monitoring their expressions.
- Locking meetings.
- Enabling waiting rooms.
- Granting participants full access to all Zoom features (like renaming themselves, private chatting with each other, sharing content, etc.).
- Having the participants list open during meetings.
- Paying attention to the feedback they can provide to you through this feature (go faster, slow down, need a break, etc.).
- Sharing and downloading documents via the chat feature.
- Accessing the chat conversation after a session has ended.
- Private chat with participants
- Pin participants
- Monitoring the chat.
- Sharing video clips with high quality audio – directly from its source.
- Sharing an application versus sharing your screen.
- Embedding your video into your sharing screen.

- Recording sessions.
- Accessing and sharing recordings.
- Setting up breakout rooms in advance
- Setting up breakout rooms at the last minute.
- Monitoring breakout rooms.
- Using and interpreting reactions
- Lowering the hand of participants.
- Creating poll questions that appear one-by-one and not all at once.
- Making reusable poll questions.
- Sharing poll results on screen after participants have answered.
- Using the closed caption feature.
- Pausing the sharing – instead of stopping sharing your screen.
- Using the whiteboard.
- Using the annotations feature
- Instructing participants with clarity on how to use annotations
- Using the text - type on the screen feature.
- Using the drawing feature
- Using the stamp feature
- Using the spotlight feature
- Clearing all annotations and asking participants to clear their own.
- Saving a screenshot of an activity and what to do with it afterwards.

How could familiarizing with these features enhance the level of engagement you provide to your participants?

BEST PRACTICES

FOR ENGAGEMENT AND VIRTUAL FACILITATION

5 RULES TO KEEP YOUR AUDIENCE ENGAGED

1. **The MVP rule** - Determine and use the minimum number of slides (Minimum Viable PowerPoint)
 2. **The 60-second rule** - Create an emotional reaction during the first 60 seconds of interactions
 3. **The responsibility rule** - Share the responsibility of participation early in the session
 4. **The nowhere to hide rule** - Give tasks in which your audience can actively engage
 5. **The 5-minute rule** - Provide meaningful interactions every 5-10 minutes
-

GENERAL RECOMMENDATIONS and SETTING

1. Develop an internal **Standard Practices Guide** for facilitation, training, and coaching. Describe roles and responsibilities of producer, lead trainer, and backup trainer including the what, when, and how around the following:
 - a. Setting up virtual platform
 - b. Coordinating the development of slides
 - c. Monitoring and responding to chat
 - d. Providing assistance with technology to participants
 - e. Being on camera versus being off camera
 - f. Using virtual backgrounds
 - g. Backing-up a trainer
 - h. Recording sessions under HIPAA compliance
 - i. Monitoring breakout rooms
2. Integrate an approach of **Equity, diversity, and inclusivity** with each other.
3. **Leverage the expertise** of other technologies and platforms as well as the expertise and strengths of other facilitators.
4. Familiarize yourself with all the **platform features**; what each one does to enhance the participants' learning experience, when each can bolster engagement, and how to use them most effectively. All features are good, knowing the what, when, and how makes them valuable.
 - a. Consider conducting 4 polls maximum for 1 hour sessions.

BEST PRACTICES

FOR ENGAGEMENT AND VIRTUAL FACILITATION

5. When developing activities, integrate an approach of **Equity, diversity, and inclusivity** focused on the participants' perspective.
6. For each session, identify a **lead trainer**, a **back-up trainer**, and **producers**. Lead trainers present, facilitate activities, and monitor the chat. Back-up trainers are ready to take over at any time, follow along the slides, monitor and respond to chat, co-train as needed. Producers manage technical aspects of the session and the most advanced and complex platform features (initiating, closing, and sharing poll results; initiating, monitoring, and closing break out rooms; sharing links and documents over chat, etc.)
7. **Setting up your space**
 - a. Connect to the internet using an **ethernet connection** - this stabilizes your connectivity, especially when more individuals are accessing your WiFi connection at the same time.
 - b. Have your **camera angled correctly** and ensure there is **adequate lighting** for clear and professional presentation.
 - c. Use a **green screen** (or a green piece of fabric for that matter) when you use digital backgrounds - a green screen helps to minimize the distractions from disappearing in the background and removing body parts from the camera.
8. Personalize your **settings**; upload a professional picture of yourself to appear when your video is off, make sure you rename yourself with identifying information (name, organization, pronouns, etc.).
9. Included on **registration forms**, "What is one thing you want to learn in this event?" and ask registrants to send in questions ahead of time for Q&A.
10. **Developing and preparing your slides set**
 - a. Consider alternative names rather than "**webinar**" that sound hosted yet more inviting or engaging (e.g. Virtual Learning Session, Distance-Based Learning).
 - b. Arrange for **multiple speakers** scheduled to present
 - c. Develop visually appealing slides; use color, rely heavily on pictures rather than text, **use animations** to convey information as it is being presented. Instead of having all content appear at once and describe each concept one at a time, have each concept appear as you are presenting.

BEST PRACTICES

FOR ENGAGEMENT AND VIRTUAL FACILITATION

- d. Use the **Notes Section** to develop a script; it allows for quality assurance, makes it easy to find relevant information already shared, keeps you on track and on time, and most importantly others can take over in case of an emergency.
- e. Include **instructions for facilitation** as part of the notes section..
- f. Integrate a **slide movement** every 20-40 seconds to keep the audience interested during virtual presentations.
- g. Include **videos** in your session; by varying the presentation style it calls for participants to re-engage and pay attention.
- h. Include a slide with Key **Takeaways** or **Commitments** at the end of the slides.
- i. Include a list of **upcoming** events such as virtual training opportunities at the end of your session.
- j. Include a list of **resources** (with links) at end of webinar
- k. If you will not be on video, paste **picture of presenter** on each slide

11. Setting up **virtual activities** for the session

- a. Develop **evaluation questions** related to what participants gained from the session or asking “what worked well and what do you wish for next time”. By incorporating dedicated time for participants to complete a simple and basic evaluation, it will increase the response rates.
- b. Develop 2-3 **poll questions** to be asked throughout the session. When conducting polls; include an “other” option in the form of “something else”, “none of these”, or “NA” option. If people respond “something else”, ask them to chat in or share what that something else is.
- c. Include specific space within your slides for the **annotation feature** if it will be used. Make sure specific instructions are described in the notes.

12. Send **slides ahead of time** so participants can take notes during the webinar.

13. Conduct **dry run** sessions to familiarize with the flow, content, activities, etc. This will increase your comfort and confidence delivering the session and free your attention that can be dedicated to increased participation.

BEST PRACTICES

FOR ENGAGEMENT AND VIRTUAL FACILITATION

BEFORE THE SESSION

14. Check audio and video prior to the beginning of the training to ensure your **technology works properly**.
15. Set up your **monitor screen** so you are able to see your notes, participants' video grid, chat, etc.
16. **Remove distractions**, such as busy backgrounds, ceiling fans, doorways, etc. from the background if no greenscreen is used.
17. Set up virtual **post-it notes** to physically remind yourself of things to do.
18. Familiarize with all the **platform features** (share content; prepare, launch, share results, and clear polling questions; instruct, use, and clear annotations; establish the meaning of the reactions; raise and lower virtual hands; etc.).
 - a. Make all chat functions available to participants - including **private chatting** and **closed captions**; this helps participants who speak English as a second language to confirm their understanding. In addition, it helps when audio issues occur.
 - b. Have written instructions to describe how to use each function - you can use these during your sessions to help learners understand how to use the function.

DURING THE SESSION

19. **Look towards the camera** when talking; have your script right below the camera so when you are reading it appears as to making eye contact with participants.
20. **Greet participants by name** as they join your session; it will encourage them to at least turn their audio on to say hello back and you will know it works properly.
21. Encourage participants to **turn their cameras on and to keep them activated** throughout the session - especially during small group activities in breakout rooms.
22. As people join, entertain them with lively conversations or conduct **icebreakers** that somehow relate to the topic. Keep in mind relevance to the topic - every single thing you do must be tied to the goal of the session.

BEST PRACTICES

FOR ENGAGEMENT AND VIRTUAL FACILITATION

23. **Pin the presenters** to the top of the screen in Zoom so they always appear first to all your participants.
24. **Share your own slides**; every facilitator needs to know and increase their own comfort with sharing their own slides. Screen sharing eliminates the distraction of hearing “next slide, please” every consistently. Additionally, if the technology or connection of the person sharing the slides slows or stops, the presenter cannot proceed. Finally, it saves time and allows flexibility to stop sharing, restart sharing, jump to a different slide within your deck, providing full control of what you present. In a session with multiple presenters and one individual must share a screen – make sure you coordinate in advance to present a smooth and well-organized delivery.
25. **Share the application** (PowerPoint, Web browser, etc.) - instead of your screen; this will help you if you need to take a look at other documents in the background while your screen is shared.
26. **Tell a story** that is relevant to the topic that is short and sweet - bring the topic to life.
27. Use **props** as appropriate; it makes things more interesting.
28. Use your body; **be expressive**. When your camera is on, all eyes are on you observing if you are tired, if you are eating, if you yawn if you disagree, if the topic excites you... make sure you move with purpose.
29. Invite participants to participate lightly at first by asking them to **raise their hand** if they have _____.
30. Increase ownership of the session from participants by conducting **text annotation activities**. This allows participants to contribute and increases buy-in and accountability into what is being discussed (brainstorming activities, group agreements, next steps, etc).
31. Keep an eye on the participants and **react to their facial expressions** and reactions by inviting them to share based on what you observed from them.
32. Motivate attendees to join the conversation by sporadically **calling participant's names** to add to the discussion (e.g. Celeste, what has been your experience at your center in regards to...?). **Asking more questions**; keeping them simple and uncomplicated.

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33. After presenting information new to the participants, **check their understanding**. Do not rely solely on asking, “What questions do you have?” Instead, prepare questions in advance that will allow participants to share back any concepts you have presented.
34. When reviewing information, conduct **games** that allow them to recall relevant details under an exciting and friendly competition.
35. **Using external platforms**
 - a. Make sure the learning curve on how to use the new platform is not steep and requires simple instructions
 - b. Have the link (labeled) ready to share with learners through chat
 - c. Have a back up plan for participants who cannot access the platform, who have limited access, or are accessing the platform from their mobile device.
 - d. Provide clear instructions on how to use the external platform
 - e. Provide appropriate time for participants to conduct the activity
 - f. Reconvene by asking them to go back to the screen where you are sharing your presentation
 - g. debrief or summarize
36. During long sessions and as appropriate, ask participants to do some **physical movement** (stretch after a break, raise their actual hands, nod, stand up, etc.)
37. Give participants **something to react to** (a video, a quote, an image, a guest speaker, etc). It will break the habit most people have of getting used to the speaker’s voice and it will put them in the driver’s seat of the discussion. You will also learn more about them this way.
38. When **demonstrations** are given, bring a volunteer to help you in the easy role. Participants will see themselves in the volunteer’s place making the demonstration more realistic and believable.
39. **When using the Chat feature**
 - a. Use the chat to communicate with the group as well as privately and make sure you respond to comments and **acknowledge posts in the chat**.

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- b. Ask participants to **chat in responses** to a qualitative question, ask discussion questions (with probes). Type the question in the chat, read chats out loud - as applicable - to ensure those who are in listen-only mode know what is being chatted. Call on people who respond via chat to elaborate.
 - c. **Monitor participants and use active listening** to demonstrate attentiveness.
 - d. When using the chat for **sharing links and documents, label them** (e.g. Link to the OC³ Virtual LS3 recording: <https://www.tachc.org/Online/Events> or List of Best Practices for Virtual Facilitation: *[attach document]*).
40. Consider **writing notes during a session** as a strategy to capture and reflect people's ideas and questions. Be wary of looking away from the camera or looking distracted to participants.
41. **When sending participants to a recess:**
- a. Say “**We will return ___ minutes after the hour**” instead of a specific hour - this will help with those participants who are working remotely in a different time zone.
 - b. **Post the return time in the chat** so participants who will step away from their computers know the time to re-start.
 - c. **Share a timer** on the screen (e.g. use a timer from YouTube and share your screen) so everyone sees what time the session will restart when breaking for recess or lunch.
 - d. **Check-in** with your co-facilitators.
 - e. When recess is over, ask participants to **turn their cameras on when they return** to the session or give you a reaction, post it on the chat, and acknowledge participants who do by name.
42. **When conducting breakout rooms:**
- a. Make sure they know they will use the first 30 seconds to **identify a reporter**. By doing this, they can plan during the session and reporting goes faster.
 - b. Only if needed and briefly **check in** with your co-facilitators immediately after the breakout rooms are open.

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- c. Assign a **facilitator to each breakout room**. Use the time during breakout rooms to join the room to observe, answer questions, provide additional guidance or details to participants.
 - d. Pay attention to the **time allocated** so nobody gets cut off from participating. Pace yourself, and manage participation.
43. **When returning from small group discussions:**
- a. Stop sharing or **takedown your presentation** to see people's faces and encourage engagement - especially when debriefing an activity.
 - b. **Summarize the main talking points** of the session, to review content and highlight key insights from the session.
 - c. **Ask participants to share questions, reactions, and comments** on the session, and how they will utilize lessons learned in practice.
44. Conduct an **evaluation** activity as part of your activities within the session; usually after the Q&A section and prior to the last activity.
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AFTER THE SESSION

- 45. **Debrief** and discuss any challenges that occurred during the session, how it was handled, how to prevent it in the future, and how (and who) to add it to the guidelines.
- 46. Review completed **evaluations**, celebrate successes, discuss any recommendations for improvement provided by participants, and develop a follow up plan.
- 47. **Follow up** with what you committed to do. Share links to the recording, slides, handouts, certificates, and other materials you promised to share with participants.
- 48. Plan how you will **integrate lessons learned** into your next presentation.

Resource INDEX FOR FACILITATION & ENGAGEMENT

Below is a comprehensive list of resources that provide technical advice for successful and effective presentations, and tools to engage with participants both virtually and in-person.

Resource	Description
Shared Practices for Engagement in Virtual Meetings	Comprehensive, interactive guide with virtual facilitation information from team member roles, technology set up, virtual engagement tactics, and responding to technological issues.
Introduction to Virtual Facilitation for Collaboration	Virtual facilitation toolkit that includes principles for virtual facilitation, overview of considerations for virtual engagement, such as adult learning techniques and common platform features.
Learning Together: Creating Engaging, Accessible, and Inclusive Virtual Meetings	Short article with quick tips on virtual engagement and accessible and inclusive digital spaces.
Implementation Science: Effective, Engaging Strategies for Virtual Implementation Facilitation	Blog post that explores challenges and opportunities in virtual facilitation, including how to build meaningful relationships virtually and what to do when a session falls flat.
Ten Virtual Facilitation Best Practices	This chapter focuses on best practices for the virtual facilitator striving for effectiveness, and successful outcomes.
Best Practices for Engagement and Virtual Facilitation	Use this comprehensive list of best practices to incorporate more virtual facilitation techniques into your practice.
The Art of Focused Conversation	Essay by Brian Stanfield on creating meaningful and effective connections through conversation.
Focused Conversation Method	Flow chart on establishing and maintaining focused conversation with participants.
Conflict Management and Negotiation	Slide deck on the importance of crucial conversations and how to navigate conflict.
4 Corners Activity	4 Corners is an engagement activity for large groups that asks participants to align with one of 4 corners or choices: People, Meaning, Structure, Action. Use this activity to understand how different colleagues approach work and how strengths across teams can be leveraged.

Resource INDEX FOR FACILITATION & ENGAGEMENT

Resources for Digital Platforms	Description
Everything You Need to Know About Hosting Zoom Webinars	Article on Zoom best practices with picture guide for optimal settings and Q&A features.
Zoom Video Conference Features	Explore Zoom features and familiarize with all elements of the platform, specifically those pertaining to virtual engagement.
How to use Mural for workshops & meetings	10 minute video on how to use Mural and how to optimize the platform features for virtual facilitation.
The guide to online workshops: Miro	Short article on how to use Miro to facilitate. See “Templates and tools to help your next remote workshop” for specific templates to use for a variety of scenarios.
Poll Everywhere (PollEV) Tutorial for Teachers and Students	Introduction guide to using PollEV including an overview of vest features for teachers and presenters.
5 awesome tips for presenting with Mentimeter for the first time!	Short article on how to present with Mentimeter for the first time, including links to tutorials on building presentations, templates, and technical considerations before presenting.
Google Jamboard Masterclass	In-depth tutorial on using Jamboard for teaching and facilitation, including resources such as the digital whiteboard tool, interactive drag and drop assignments, small group work, and digital interactive notebooks
Tools for Teachers, Facilitators, Team Leaders	Tools and resources for engagement in virtual facilitation sessions, presented using Padlet! Also use to explore Padlet and its information sharing capacities.
Facilitating peer learning in the classroom using Padlet	Introduction to Padlet for facilitation, with tips on how to use platform features for collaborative learning such as brainstorming, peer learning, collating or curating research and resources on a topic, gauging student’s understanding of a topic or concept etc.
Distributed Work Guide: Meeting & Facilitation Tools	Short overview on virtual platforms for facilitation and tips on how to incorporate digital platforms into presentations.
The Top 25 Digital Facilitation Tools for Virtual Workshops and Event	Explore more online platforms marketed for virtual facilitation, keep up to date on new platforms emerging, and identify platforms to try out during a session.