How To

Best Practices for Virtual Facilitation

JengaLab TechChange DEVELOPMENT GATEWAY An IREX Venture

BEST PRACTICES FOR VIRTUAL FACILITATION

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OVERVIEW

ABOUT THIS GUIDE

Video conferencing can provide a highly effective, cost-efficient means of gathering and training individuals from across communities, countries, and the globe. When we host a training, meeting, or course over a video conferencing platform instead of at an in-person venue, we eliminate travel time, space requirements, and related expenses. However, virtual facilitation brings unique challenges and needs. To be successful, individuals managing virtual sessions must consequently account for those challenges and needs and be ready to proactively and flexibly support participants while operating technology.

The goal of this guide is to prepare readers to effectively manage and facilitate a synchronous (or live) virtual training on the day of the session. This guide does *not* address how to design that session. To learn how to design an engaging, successful virtual session, please refer to the **Guide for Training Using Digital Platforms**.

In the **Guide to Training Using Digital Platforms**, under headings related to blended trainings, readers can learn about:

- The components of a strong agenda
- The development of assessments and surveys
- How to design engaging activities

In this guide, **Best Practices for Virtual Facilitation,** readers will learn about:

- The technology requirements for successful facilitation
- Roles and responsibilities of participating facilitators
- Best practices for virtual facilitation
- Common challenges to virtual facilitation and how to address each challenge

VOCABULARY

General Vocabulary

Asynchronous: A learning experience in which learning does not occur in the same place nor at the same time as other students' learning. Learners can engage with content at their own pace, and learning occurs without other students or a facilitator/teacher present. An example might include a recorded lecture with quiz questions.

Blended: A learning experience where there are both synchronous (virtually live) and asynchronous (self-paced) learning touchpoints.

Digital/Virtual: A mode of engagement during which learners are engaging with content via online platforms, such as a video conferencing software or other online platforms.

Hybrid: A learning experience where there are both virtual and in-person learning touchpoints.

In-Person: A mode of engagement during which learners are engaging at the same time, in real-time, and in physical form.

Self-Paced: A synonym for "asynchronous."

Synchronous: A learning experience where learners are engaging at the same time, in real-time (live). Examples might include a webinar or Zoom call.

Live-Session Vocabulary

Backchannel: A digital platform (such as WhatsApp, Microsoft Teams, or Slack) that provides an instant, informal means of communication between facilitators and any other staff supporting the virtual session.

Breakout Room: Any virtual room/space in which participants work in small groups to discuss ideas or complete activities.

Facilitation: The process of guiding a group of people through a series of activities and/or discussions to achieve specific goals through effective communication, collaboration, and interaction.

Facilitator: Someone who assists a group of people in achieving a set of goals by fostering an inclusive environment, managing discussions, and providing activity-related instructions and support.

Main Room: The virtual room/space in which plenary sessions are held and participants first enter when they join a video conference call.

Plenary: Any activities or components of a live session that are attended by all participants at a conference (as opposed to small groups or breakout sessions).

Third-Party Platform: Any platform that is *external* to your main digital platform or video conference system; this includes any digital platforms you link out to or use alongside your main platform. Examples might include collaborative documents (such as Google Docs) or polling software (such as Mentimeter).

TECHNOLOGY CONSIDERATIONS

TECHNICAL REQUIREMENTS

Internet Speed

Most live virtual sessions won't require fancy, professional technology hardware; the majority of laptops or desktops with a microphone and camera should work. However, facilitators, in particular, need a strong internet connection to ensure they don't drop off the call or cut out during critical instructions or discussions.

You can complete an internet speed test here. This speed test is available regardless of the device from which someone accesses it (e.g., smartphone or laptop/desktop computer). Use the following metrics to determine how strong your internet connection is. To successfully run your virtual workshop, we recommend an internet connection that is, at minimum, in the "good" range.

- **Upload:** 20+ Mbps BEST, 10+ Mbps good, <3 bad
- **Download:** 20+ BEST, 10+ Mbps good, <5 bad
- **Ping:** <25ms BEST, <50 good, 100+ bad

Video and Audio Equipment/Quality

In general, your computer's built-in video camera and microphone/speaker will be sufficient when you're running a virtual workshop or training. However, in order to ensure high-quality video and audio, you may still want to think about other aspects of your space and lighting to most effectively set a good impression and capture participants' attention.

Lighting: As much as possible, try to position the lighting in front of your face to reduce shadows and backlighting. Don't sit directly behind a window or another light source. You don't need expensive artificial lighting to achieve your desired results. Natural light from a window can be more than enough to create a warm, natural look.

Background: If possible, try to find a space that will provide a neutral background with few distractions. This will ensure participants remain focused on you, rather than anything behind you, while you're giving instructions or leading a debrief. If needed, consider blurring your background or using a simple virtual background.

DETERMINING YOUR TECHNOLOGY

Video Conferencing Options

Video conferencing software options—such as Zoom, Microsoft Teams, WebEx, and Google Meet—are becoming increasingly sophisticated, with regular updates that release new features and improve the software's overall performance. Which option is best will depend on the needs of your participants and the characteristics of your agenda. Some of the most important features you will likely want to consider when selecting video conferencing software include the following:

- **Breakout rooms** are essential for any experience with small-group activities.
- **Polling capabilities** that are integrated directly into the video conferencing software can help increase interactivity, though they may also be supported through third-party audience engagement software.
- **Closed captioning and/or simultaneous interpretation functionality** may be a needed feature to increase your event's accessibility.
- **The ability to have multiple co-hosts** can make the facilitator logistics significantly easier—especially when all co-hosts can help do things like manage breakout rooms and launch polls.
- **Webinar and/or live-streaming capabilities** may be needed to support large events targeting the public.
- **Advanced features such as integrated whiteboards, virtual effects, or participant "reactions"** may be helpful add-ons, depending on your audience and objectives.

Compare virtual conferencing tools through G2, which allows easy comparisons of selected video conferencing tools and graphics that map competitors within a Market Presence versus Satisfaction grid.

Free Tools and Resources

There are numerous free tools and resources (also referred to as *third-party platforms*) that can be used to increase participant engagement and productivity during virtual sessions. These tools can be used in a variety of ways and serve a variety of purposes, but most often, they provide a place for participants to interact with the content and/or record ideas. Additionally, by providing a visual of participants' thinking, they help facilitators better track and support participant needs.

The sample tools and resources described below have both paid and free options. As services regularly update their features and pricing models, be sure to check each service's website to confirm their current offerings.

Google Suite

Google Docs, Slides, Sheets, and Jamboard all offer an easy-to-use, completely free collaborative space where participants can take notes, record ideas, brainstorm, and more. Just a few of the possible uses for Google Suite include:

- Send out a link to a **Google Doc** or **Google Slide** that includes the questions participants should discuss in small groups and space for participants to take notes.
- Create interactive activities on **Jamboard.** Jamboard acts like a virtual whiteboard and can provide an ideal space for brainstorming and note-taking.

Audience Engagement Software

Audience engagement software includes tools and platforms that can be used to collect live feedback from participants in the form of polling, quizzes, surveys, and Q&As. Most tools allow participants to engage either through a QR code, a website and event code, and/or a direct embed into a digital platform.

While most of the competitors within the audience engagement software sector have similar core features, each tool has its own look and feel, along with unique features related to the kinds of polls available and ways in which participants can engage. As you consider which software is best suited for your virtual experience, consider the following factors and features:

- **Anonymity** is often a default feature in polling software. Consider whether you need to know who submitted what response.
- **Advanced types of polls, such as upvoting or ranking,** may not be available on every software or with every plan. Make sure whatever software you choose includes the types of polls you would like to present to your audience.

Compare audience engagement software through sites such as Capterra or G2, which allow easy comparisons of selected polling tools. Some of the most popular options include:

- Slido
- Mentimeter
- Quizizz

Virtual Whiteboards

While far from a required tool, online whiteboards bring a little bit of magic into virtual experiences. Online whiteboards serve a purpose similar to that of sticky notes and flipchart paper, and they tend to result in beautiful digital artifacts. You might consider using whiteboards for activities such as:

- **Brainstorming:** Everyone can add sticky notes with ideas to a board, and then you can easily begin to cluster these ideas into themes.
- **Prioritizing:** If you have a lot of ideas and aren't sure where to start, simple frameworks can make prioritizing ideas easy.
- **Knowledge Checks:** Make knowledge checks even more engaging by using whiteboards to create drag-and-drop or fill-in-the-blank activities.

When determining which virtual whiteboard service to use, consider the following:

- **The ability to lock content** can significantly improve the overall quality of the activity and the whiteboard, as it prevents participants from accidentally moving instructional pieces of the board.
- **Video conferencing from within the whiteboard** may make collaboration even easier by preventing the need for an alternative video conferencing software, which participants would otherwise be required to toggle between alongside the whiteboard.
- **Timers** can help participants better pace themselves during activities, especially those activities that include multiple parts one must complete within a restricted time frame.
- **Voting functionality** can provide an interactive method to prioritize and identify the most popular ideas.
- **Download/export your whiteboards** as PDFs, images, vectors, or .csv formats, depending on the whiteboard software you choose.

Compare whiteboards through sites such as G2, which allows easy comparisons of selected whiteboard platforms. The most popular virtual whiteboards include:

- Miro
- Mural

TROUBLESHOOTING GUIDANCE

Internet Connectivity Issues

If you or a participant experience a poor internet connection during the workshop, try some of the troubleshooting tips below:

- Bring your computer or mobile device closer to the WiFi router or access point in your home or office.
- Connect directly to the WiFi router through an ethernet cable.
- Restart your router and computer device.
- Close other applications that are currently open on your computer.
- Disable HD options.
- Turn off your video.
- Use a call-in number for audio connection.

Audio Issues

Check the audio settings: First, whoever is having issues should check their audio settings from within the video conferencing platform and ensure they have connected to the correct audio system. If you're using Zoom, the participant may need to click "Join Audio."

If the participant has connected their audio but is still having issues, ask them to check which microphone/speaker they've connected to the video conferencing platform. On Zoom, you can access this information by clicking the up arrow next to the Mute/Unmute button. If they have multiple audio options to choose from (for example, headphones and system audio), have the participant try a different speaker and microphone. You can also have them “Test Speaker & Microphone.” If issues persist, often, having a participant leave the call and rejoin solves the problem.

Use a call-in number: If a participant is still unable to connect their audio, have them call in using a call-in number. Try to keep call-in information on hand at all times; you never know when audio issues might become a problem for someone, or even for yourself!

ROLES AND RESPONSIBILITIES

OVERVIEW

Virtual facilitation is a complex process that involves many constantly moving pieces that those responsible must carefully track, manage, and respond to. Consequently, virtual facilitation can rarely be done with just one individual, particularly if you want to do virtual facilitation *well.* In the section below, we describe recommended roles to which someone should be assigned to support day-of virtual facilitation. After providing a description of the role, we explain that role’s specific responsibilities.

Of course, these roles and responsibilities will be and should be flexible based on the unique needs of your live session. Some responsibilities won’t be applicable; alternatively, you may have additional duties to add to the list. What’s most important is that you identify them ahead of the live session and clearly assign them to a single individual so they don’t fall through the cracks.

LEAD FACILITATOR

Overview

The **Lead Facilitator** is the individual who takes the lead on any particular day with the aspects we most commonly refer to as “facilitation”: Directing the overall arc of the day, welcoming participants, providing instructions, and managing any debrief discussions. In some cases, the Lead Facilitator will be the same person the entire session; in other cases, this person may switch throughout the session, with one person managing one activity or discussion, and another person managing the next activity or discussion.

The role of the Lead Facilitator is far from easy: it requires sustained attention to what’s going on to ensure you can then answer any questions and draw connections between what participants say or do. Especially when you have a long day (more than two hours), we recommend switching who plays the Lead Facilitator role throughout the day to help preserve the facilitator's energy and reduce Zoom fatigue.

Note that while the Lead Facilitator may *also be a Subject Matter Expert, they don’t necessarily need to be; depending on your session, there may not be a Subject Matter Expert, or the Subject Matter Expert* *may be a different individual. At its core, the Lead Facilitator is the individual who knows all there is to know about the session's agenda and is confident and comfortable leading participants through that agenda.*

Responsibilities

Lead Facilitator responsibilities typically include:

- Giving directions for and/or demonstrating activities
- Calling on participants to answer or ask questions
- Introducing speakers and subject matter experts
- Tracking collaborative documents during small-group work to help structure a more meaningful debrief
- Checking in with breakout groups to ensure groups are on track and answer questions as needed
- Summarizing and synthesizing participant ideas during full-group discussions

TECH PRODUCER

Overview

The **Technical (or "Tech") Producer** manages all aspects related to day-of-event technology. The Technical Producer is a core member of the facilitation team, helping to ensure that the Lead Facilitator can keep their attention focused on the content of the session while someone else manages technical logistics. While it's possible to have one person take on the role of both Tech Producer and Lead Facilitator, such an arrangement will increase the likelihood of falling behind in timing, incorrectly setting up aspects of the technology such as breakout rooms, and/or letting something fall through the cracks.

Responsibilities

Technical Facilitator responsibilities typically include:

- Letting people in from the waiting room
- Posting relevant links in the chat
- Responding to participant queries related to technology (e.g., *Why isn't my microphone working?*)
- Managing breakout rooms (including creating breakout rooms, sending people to breakout rooms, and sending broadcast messages)
- Sharing their screen (when relevant)
- Launching and managing polls
- Starting and pausing the recording

SUPPORTING FACILITATOR

Overview

The **Supporting Facilitator** is an optional facilitation role; whether you have or need a Supporting Facilitator will depend on your experience, needs, and capacity. While nice to have, we realize that for many, a third facilitator would likely be a luxury. However, especially when facilitating experiences with many moving pieces, it is ideal to have someone who can fill this role.

In many ways, this facilitator's role is intentionally undefined; this should be an individual ready to address unexpected needs or issues that the other facilitators are unable to manage due to competing priorities. For example, you may find you need a third facilitator to help address participant questions about the technology or other logistics of the event, or you may want someone to just manage poll questions while someone else creates breakout rooms. In other cases, you may use the Supporting Facilitator to help take notes or keep track of content-related questions that will need to be answered during the time provided for Q&A.

Responsibilities

Supporting Facilitator responsibilities may include (but the following should be adapted to fit your needs):

- Tracking attendance
- Sending timing reminders to facilitators and/or speakers
- Floating around breakout rooms
- Responding to requests for help from participants in breakout rooms
- Taking notes on key takeaways
- Collecting content-related questions for presenters to address later during dedicated Q&A time
- Stepping in to support tech logistics, as directed/requested by the Tech Producer
- *Other roles as needed*

BEST PRACTICES AT EACH STAGE OF YOUR AGENDA

OVERVIEW

How you can best support participants in a virtual session will look different depending on where you are on your agenda and how you're interacting with participants at any particular moment. While agendas will look slightly different depending on the session's context and objectives, in general, a strong agenda will include the following key components:

- **Set-up:** Set-up typically happens before participants arrive at the session. Depending on your comfort level with virtual facilitation, set-up typically lasts 10-30 minutes and includes time for facilitators to check their technology and check in with each other.
- **Tech Testing:** Tech testing happens right as participants arrive and is a process that occurs *with and for* your participants. It's time spent at the start of a live session to make sure that participants' technology is working properly and that they know how to use key features/platforms that will be needed to engage in later activities.
- **Prelude:** During the prelude, facilitators welcome participants to the session and set the tone for the remainder of the session. This time often includes a brief description of the agenda and objectives for the session.
- **Content:** Content refers to anything that you or participants do during the session to learn and engage meaningfully with the session material. This section of an agenda will vary widely depending on your session objectives, but generally includes one or more (ideally all of!) the following three components:
    - **Presentations:** Direct instruction that explains core concepts to participants.
    - **Small-Group Activities:** Opportunities for participants to work in small groups (typically two to six people) to either discuss questions, brainstorm ideas, solve a problem, practice a skill, etc.
    - **Large-Group Discussion:** Time spent in plenary where selected individuals are invited to respond to a discussion question and/or debrief a small-group activity.

Learn more about the key components of a synchronous agenda in the "Designing a Blended Training" section of the **Guide for Training Using Digital Platforms**.

SET-UP

Arrive Early

The virtual world is convenient: There's no travel time. However, don't let this become an excuse to arrive "on time" to your session; all facilitators should arrive *at least* 15 minutes *before* they expect to let participants in, though we recommend coming as early as 30 minutes in advance depending on the length and complexities of your session. Use this time to test your technology, ensure you can log into all relevant platforms before the start of your workshop, and coordinate any last-minute clarifications and responsibilities with other facilitators.

Finalize Your "Plan B"

Facilitators should always have a "Plan B" in place for when participants can't access technology, videos fail to load, wifi becomes unstable, or other issues occur. Make sure you have easy access to key links, such that you can share those links with participants through multiple modalities (e.g., through email, an online platform, and/or your video conferencing chat feature). Additionally, check in with any Supporting Facilitators to ensure they're also ready to play videos or share documents should anything fail on the Tech Producer's end.

TECH TESTING

Expect Tech Questions

Even as we become increasingly comfortable using video conferencing platforms, unexpected challenges still arise with technology: wifi might be unusually sluggish, a required platform update might slow participants' arrival, or a new headset might result in microphone or speaker issues. Plan to take about two to three minutes answering participants' technology-related questions at the very start of the session, and encourage participants to reach out with any questions right as they log on rather than later so that any issues can be resolved when it will be least disruptive to the overall session.

Practice Key Tech Skills

If you plan to use any technologies outside of the video conferencing platform to support your workshop, use a quick icebreaker to practice skills participants will need to use those technologies effectively. For example, if you're using a third-party platform such as Miro or Google Docs in a later small-group activity, include an icebreaker that uses those platforms. Even if you're just using the video-conferencing platform, consider asking participants to respond to a question in the chat (to encourage use of the chat later in the session) or including a casual Zoom poll (e.g., *What's the weather where you are currently?*).

PRELUDE

Video Conferencing Norms

Video conferencing norms refer to the ways in which participants interact with the video conferencing system. Explicitly describe these norms at the beginning of the session, and remind participants of the norms as needed throughout the session. Consider norms such as the following:

- Use your camera to show that you are present and engaged. Try to keep your camera on as much as possible if you're able and comfortable.
- Embrace the craziness in your background. Things happen!
- Get up and take breaks as you need them.
- Use the hand-raise function to indicate when you'd like to speak; alternatively, share questions/comments in the chat.
- Keep yourself on mute unless you're speaking.
- Keep your view in Gallery Mode when in small groups.
- Make sure your name in the video conferencing platform is your actual name.

Workshop Ground Rules

Workshop ground rules refer to how participants interact with each other throughout the session—whether through chat, during small-group activities, or during full-group discussions. Share these ground rules around the time you share the video conferencing norms and reinforce the ground rules during the session as needed. Consider ground rules such as the following:

- Be curious, open, and respectful.
- This is a safe space to express with confidence.
- One person, one mic.
- Speak from your own experience.

- No one knows everything. Together, we know a lot.
- We can't be articulate all the time.
- Avoid jargon, acronyms, and industry language.
- Acknowledge the difference between intent and impact.
- It's okay to disagree. It's not okay to shame or blame others.

CONTENT: PRESENTATIONS

Polling

Whether you're presenting in-person or virtually, one of the biggest challenges involves determining what content you'll actually present and what content will be withheld for the sake of time. Virtual tools can be highly effective in helping to make this determination.

Depending on your comfort level with the material, if you have a lot of information you could share about a specific topic, but know you don't have time for everything, use a poll at the beginning of the session to gauge participants' interests and needs. Consider what the main topic areas are, then invite participants to vote on those topics that are most relevant to them right at the start of the session; for the remainder of the presentation, you can then focus on the topics in which participants have indicated the most interest.

Alternatively, use polling throughout a presentation to check participants' understanding of the content and engagement in the session. For example, you may ask questions that invite participants to reflect on their own values, beliefs, or preferences as it relates to the material, or you may ask questions that test what participants have learned. Either way, polling helps participants stay engaged and interact with the content more meaningfully.

Use of the Chat

Whenever possible, the person presenting content should not be the person also watching and managing the chat box. In some cases, additional facilitators can offer this support, such as by responding to simple queries, noting questions that should be addressed by the Subject Matter Expert or Lead Facilitator, and letting the Subject Matter Expert or Lead Facilitator know when they may need to pause to clarify something. In best-case scenarios, the person managing the chat should be another Subject Matter Expert who can respond to at least some questions directly in the chat.

CONTENT: SMALL-GROUP ACTIVITIES

Communication Methods

Remind participants how they can get in contact with a facilitator should they need help in breakout groups. On Zoom, for example, this would include clicking the "Ask For Help" button at the bottom of their screen, as the chat feature is unable to send messages between participants in different breakout rooms. You may also want to determine how *you* will communicate important information to participants during activities; for example, you might use the "broadcast message" feature, or you might use features (if available) that allow you to screen-share a slide into breakout rooms.

Shared, Collaborative Documents

If you have multiple small groups that are working in a shared, collaborative document (such as a document on Microsoft Suite, Google Drive, or an online whiteboard), open up the document to observe their progress. Visit groups that are far behind to check in and answer questions.

Spokesperson Identification

Ask each group to select one individual who will share key findings and takeaways from their small-group discussion. Having groups select a spokesperson will prevent long silences during the debrief and ensure a more organized, balanced final debrief. You might also want to let participants know the precise question that you'll ask them to respond to or summarize during the debrief so they can prepare exactly what they want to share.

Visiting Groups

If possible, try to visit each group at least once to check in and answer questions. This is especially important at the beginning of any activity, when participants may still have questions about the instructions.

CONTENT: FULL-GROUP DISCUSSION

Knowing Your Audience

Going into any session, have in mind a couple of participants who you could call on if only a few people (or no one) raise their hand to share during a debrief. Review the list of confirmed participants (or consult someone who knows them well) and consider who regularly offers valuable comments and/or who works on projects related to what you'll be discussing. This is also when you want to call on each group's specific spokesperson.

Chat Responses

If participants aren't eager to share over live video/audio, remind them they can share their ideas and responses in the chat. Once you have a couple of people who have responded in the chat, you can call on a few of those individuals to elaborate verbally on their ideas.

"Wait Time"

"Wait time" refers to the time that a facilitator waits between asking a question and getting a raised hand (or not) and consequently following up with another question. Wait time involves silence as participants reflect on the question and gather their thoughts. This silence, or wait time, leads to a more enriched conversation because participants' initial thoughts have already been internally reviewed. Wait at least five seconds (count in your head) before following up with additional questions or calling on participants randomly.

Nonverbal Communication

Capitalize on nonverbal communication techniques by asking participants to use the reaction or chat feature to indicate agreement, ask questions, and/or share related resources from their personal work experiences from which the rest of the team might benefit.

Avoiding Strong Stances

Good facilitation is about raising provocative questions and staging dynamic conversations. Weave in your personal experience, but try to limit your own opinions and biases where possible and instead stage engaging dialogue and activities. Paraphrase participant contributions at the end of each discussion. You may need to jot down notes as participants share. This is where having a Tech Producer and Supporting Facilitator to attend to questions unrelated to the content is key so that the Lead Facilitator can remain focused on participants' contributions.

ADDRESSING CHALLENGES

ZOOM FATIGUE

Overview

"Zoom fatigue" refers to the feeling of exhaustion, burnout, or increased stress that people may experience after participating in virtual meetings, video conferences, or online communication platforms for extended periods of time. It is not limited to the Zoom platform; it can occur with any video conferencing tool or virtual communication method.

Potential Solutions

Create flexible norms. It may be tempting to require that all participants leave their cameras on the entire time. However, creating such inflexible rules or norms can ultimately exacerbate Zoom fatigue. As the Stanford News describes, Zoom fatigue is caused by factors such as excessive eye contact, watching yourself for long periods of time, and reduced mobility. Looser norms that permit greater flexibility when it comes to sitting before the computer and keeping cameras on or off could help some participants stave off Zoom fatigue.

Use regular breaks and energizers. It doesn't matter if you're running late or have a significant amount of content and learning to cover; don't skip any breaks or energizers. They're needed opportunities to disrupt the monotony of routine Zoom meetings. Sometimes, you may even find you need more than planned; keep a list of energizers on hand so you have some easy options to pull from should you notice that participants' energy levels are low.

ACCESS TO AND FAMILIARITY WITH TECH

Overview

The kinds of technology that participants have access to and can successfully use will significantly impact the way you facilitate and manage a live virtual session. Disruptions may occur if participants are regularly dropping off a call, are unable to turn on their video camera, or are unable to access third-party tools due to a weak internet connection. As you prepare for a live session, you should ask yourself: Are your participants joining from high-bandwidth or low-bandwidth environments? Are they joining via computers or via smartphones? Do they regularly use technology in their day-to-day lives? All of these will impact how you prepare for and run your live session.

Potential Solutions

Prepare in advance. Whenever possible, learn about your participants before you begin to design your session. In general, when we design a training or course, we begin by thinking about our participants: who they are, what goals they have, and what challenges they face that this session will help resolve. In addition, you should determine their access to and familiarity with technology and use this information to inform your agenda and preparation. For example, if you are likely to have many participants joining from a low-bandwidth environment, you may want to prioritize having a Supporting Facilitator who can help get participants back into breakout rooms if they drop off the call. You may even need more than one Supporting Facilitator, if you decide that you want someone in each breakout room who can help manage and screen-share a collaborative document or other third-party platform.

Use low-bandwidth tools. If you know most of your audience is logging in from low-bandwidth environments, consider using only low-bandwidth tools or potentially no virtual tools. While virtual tools such as Miro or Mural have their benefits and appeal, they often require a strong internet connection. Turning what could have been an activity on Miro into an activity on Google Docs or Google Slides can significantly increase participants' access. Alternatively, consider designing activities that don't require collaborative materials at all and instead prioritize discussions, polls, or other types of interactions that can all take place within your video conferencing platform of choice.

Identify and utilize scribes. If you want participants to record the ideas or answers that they discuss in breakout rooms, consider ensuring that each group has a "scribe," or note-taker, who can take notes in a designated location (such as a Google Doc or Miro board). Scribes typically come from one of two places:

- Option 1: Scribes may be a member of the facilitation team or another outside consultant, someone who has been brought into the experience explicitly to record the conversation on the virtual tool of choice.
- Option 2: Scribes can be volunteers from your group of participants. Inquire if any participants are willing and have the bandwidth to manipulate the relevant virtual tool. Then make sure each breakout group has at least one member who is willing and able to be a scribe.

Be flexible. While it's not always easy to be flexible during a live session, it can be critical to facilitating a successful virtual session. For example, you might discover early in a session that, despite your initial research, most participants' internet connectivity isn't strong enough and most aren't able to access the Miro boards you've created. In this case, you might take a 10-minute break to quickly redesign the activity such that it can be done on a shared Google Doc or Google Slide instead, since they require less bandwidth to access.

ACCESSIBILITY AND INCLUSION

Overview

Throughout the process of designing and facilitating a virtual experience, accessibility and inclusion must be top of mind. The following section provides a *sampling* (not an exhaustive list) of best practices for creating an accessible, inclusive virtual experience. However, don't let this be the end of your learning; continuous exploration and regular evaluation of facilitation practices are necessary to ensure we're not unintentionally leaving certain people out when we mean to bring everyone into our virtual spaces.

Potential Solutions

Explicitly address accommodations from the beginning. Take some time before your virtual experience starts to ensure that each participant has what they need to participate. If you know who will be attending your experience, send an email ahead of time inviting participants to inform you of their needs; consider anonymous forms so participants can share information privately. Alternatively, use the Tech Testing or Prelude section of your agenda to invite participants to send a private chat requesting accommodations for their learning and participation.

Share the agenda ahead of time. When emailing participants about accommodations, provide the agenda and other relevant virtual materials. In doing so, participants can prepare to participate more fully in the live experience, perhaps by preparing mentally/emotionally for a difficult conversation or important decision or by requesting the most appropriate accommodations for the virtual tools being employed.

Come ready to listen. As facilitators, sometimes we mistakenly believe that our role is to speak. However, the best facilitators are those who let their participants drive the experience. Facilitators must do so while remaining ready to listen to diverse points of view and working intentionally to ensure that each participant's voice is heard. Reflect on the biases you may bring to a conversation, and thoughtfully call on participants who have spoken the least during any experience.

Don't ignore micro-aggressions. It's many facilitators' worst fear: A participant says something that discredits, insults, or disparages a group of people and/or a particular individual, often without the speaker's awareness of the offense. While tempting to ignore it in an effort to "keep the peace," it's important that, as facilitators, we recognize the issue and address it appropriately to ensure the group can move forward.

Ask for and welcome feedback. As facilitators, it's important that we own up to mistakes and recognize when a situation could have been better handled. Regular feedback from our participants can lead us to become cognizant of the intentional and unintentional impact of our facilitation style. Consider asking questions such as, "What has been the impact of this session so far?" or "Is this session meeting your needs? What else might you need?" Try different approaches to soliciting feedback (e.g., inviting private messages or providing anonymous forms) to ensure participants feel comfortable sharing.

APPENDIX

This is a collection of all the resources listed throughout the document, as well as several others that may be useful when designing asynchronous training content and/or synchronous training sessions.

VIRTUAL FACILITATION RESOURCES

- Guide for Training Using Digital Platforms
- G2.com *(for comparing different third-party platforms)*
- Four Causes for 'Zoom Fatigue' and Their Simple Fixes
- Radically Remote: Facilitation Toolkit
- The Definitive Guide to Facilitating Remote Workshops

RECOMMENDED THIRD-PARTY PLATFORMS

- Google Suite
- Slido
- Mentimeter
- Quizizz
- Miro
- Mural

JengaLab

TechChange

DEVELOPMENT GATEWAY
An IREX Venture