OLOF PALME INTERNATIONAL CENTER

GUIDE TO ONLINE TRAININGS AND ACTIVITIES

- PLANNING, DESIGNING, DELIVERING AND FOLLOW UP

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CONTENT

1. WELCOME

Hi! 👋

It is a great pleasure to provide you with this guide to Online Learning and Activities - how to plan, design, deliver and follow up on digital courses and trainings. The guide has been created with the rapid changes on a global scale due to Covid-19 in mind. The pandemic has forced people around the world to find new ways of practically working with an increased need for leadership in online learning and facilitation. The restrictions on social gatherings and physical meetings have been an opportunity to rethink the way we implement activities within our different programmes and projects.

We have all gone through a process where online activities were something we did while waiting for the pandemic to end, to realize that during 2020 a majority of our activities will actually take place online, to finally understand that this will create a permanent change in terms of how we meet, learn, interact and collaborate. It will not replace physical meetings after the pandemic, but it will complement and expand our activities.

The pandemic also raises questions about democracy. Tendencies of shrinking democratic space during the pandemic, lockdowns and states of emergency do not only call for more capacity-building online, but also for actors who work in favour of democracy to become more active online together.

The Olof Palme International Center therefore came to the conclusion that we need to:

1. Build up our joint capacity to conduct qualitative online trainings, academies and activities.
2. Act as fast as we can, so that we can make use of last months this year in the best possible way.
3. Grasp the opportunity. If we use this possibility, we will have a tremendous tool for future learning and international collaboration. We can reach and involve so

many more than before, from our grassroots to partners and experts from all over the word.

With that in mind we have created this guide to support you in your work to develop and implement activities online.

The guide is based on two parallel concepts. The way we as human beings learn remains the ***same***, no matter if we meet onsite or online. It still builds on basic ideas of inclusivity and the importance of sharing experiences among each other. But the conditions for learning are ***different***, thus we need to understand how to create those conditions when we move from an onsite to an online setting.

The idea is to provide the tools so our online trainings reach as good quality as possible considering the needs that we have in every training setting. Clear objectives, good preparation, dynamic presentations, high level interaction and participation, work together in small groups, exchange of ideas, room for appreciation and evaluation, exercises that build human relations and networks, etc. At the same time indicating the shortcuts to good experiences online and how to avoid the common mistakes online.

Therefore, the guide has been divided into two parts:

A ***hands on guide***, on what to think about before, under and after the online training. This part covers everything about the process, manuals, practical tips, templates and examples that you need to know in order to plan, implement and conduct an online learning activity.

And a part with a ***theoretical framework*** for online learning - where we go through the basis for training and learning, the importance of building psychological safety, creating clarity, enabling participation and collaboration, how to embrace technology and digital tools, and how this applies when we do online trainings.

Those parts can be read either together or separately, depending how familiar you are with principals of education and using online tools.

The Olof Palme International Center is offering this guide to our partner organisations around the world, and to the staff at the Palme Center. In this way we hope that we can contribute to the strategic partnership and our common learning.

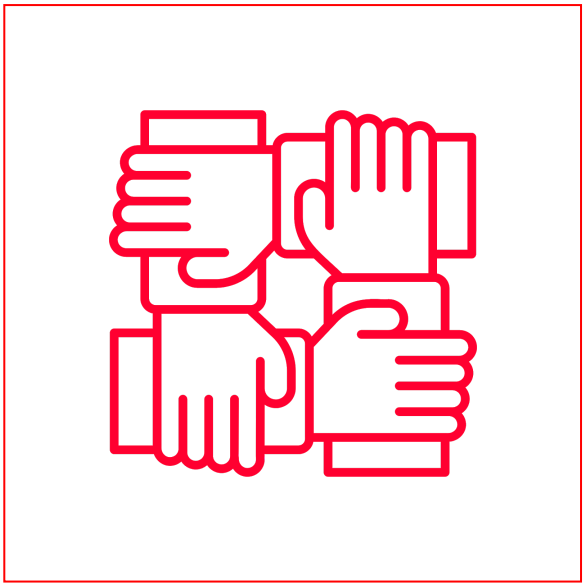
We are in the beginning of this process and still learning and will keep on updating this guide and exchange ideas, based on our common experience and what we learn along the way. So, stay tuned, online of course.

2. FOUR KEY AREAS FOR ONLINE LEARNING

This guide is created with four key areas in mind when planning, designing, delivering and following up on trainings in online settings. The areas constitute a good starting point and platform for creating qualitative and effective learning online. In the next chapter you will find a more hands-on and practical approach based on these key areas - what to think about and to do when doing trainings in an online setting.

Building psychological safety
- Co-create a safe environment for meaningful exploration and qualitative learning.

Create clarity
- Purposeful structure, setup and communication - internally for course delivery team and externally towards participants.



Enable participation and collaboration
– Design interactive processes for active participation and collective generation of insights.

Embrace technology and digital tools
- Make conscious choices in line with your learning fundamentals and apply a constructive attitude to new digital tools.

3. HANDS ON GUIDE: BEFORE, DURING AND AFTER

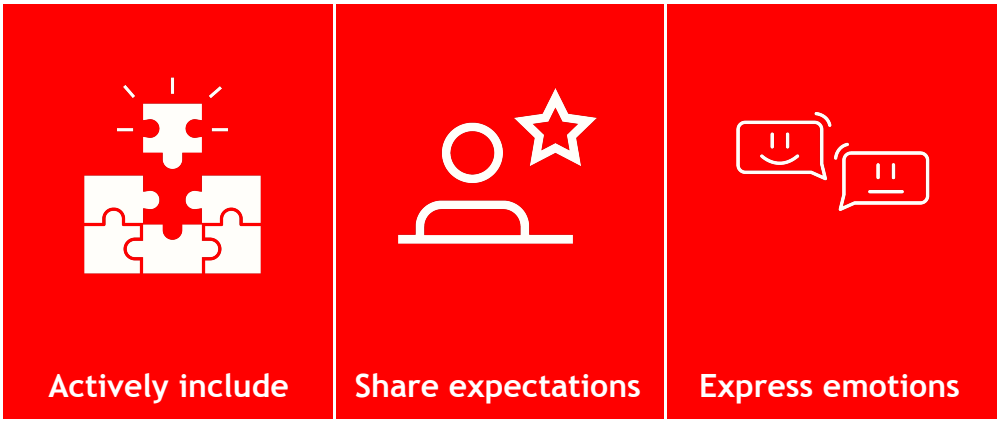
This chapter has a hands-on - what to do - approach, when doing trainings in online settings. Each key area is shortly introduced and then presented from a *before*, *during* and *after* aspect of implementing online trainings. See the different points as an inspiration and a potential checklist of things that are good to think about. Then take your own wise decisions of what to do and how to do it, depending on the context and preconditions of the training you have in mind.

BUILDING PSYCHOLOGICAL SAFETY

Useful techniques on how to build psychological safety in an online environment

We are social beings. First and foremost. It is how our brains are wired and function. We scan the social situation. All the time. This is true when we meet up in a physical space, and it is true when we meet up online.

When we meet the basic social human needs as learning designers and facilitators, we support people to co-create a safe space for qualitative interaction. We also support people to be able to as a next step, after having connected socially, to focus on the subject matter. If we do not meet the social needs, people will be preoccupied with the social scanning anyway, and they will be less able to focus on the subject matter at hand.



When working online our experience is that we need to put even more effort into creating a safe enough space for people to interact due to the physical distance. With physical distance, in an online setting, we use fewer senses. We lose quite a lot of our ability to read body language. With distance our empathy can decrease. Making an extra effort to socially connect can narrow the gap and bring people together. You can create a more qualitative online experience with small means/details. Below we share some aspects and concrete ways to meet the basic social human needs online.

BEFORE THE COURSE

Post a personal video - if participants post a video (requires a shared space for participants, i.e. on *Facebook*, in *Slack* or similar) to share a little bit about themselves before the course startup, it will help the participants to socially and emotionally connect.

Express expectations - ask people to share their expectations, not only to the course team, but to all participants in a shared space for participants, (i.e. on *Facebook*, in *Slack* or similar) beforehand.

1-to-1 check in or in smaller groups - have initial chats with participants as a facilitator before the course starts. If they feel connected with you as a facilitator they will probably immerse themselves in the learning journey quicker. Check-ins in smaller groups with participants will also allow them to connect with each other, and not only with you as facilitator. In our perspective, it is even more powerful for them to connect with each other and it will lower the threshold of interaction once you start the course.

Clarify course framework - when participants understand why, what they will do and how they can work together in the training session, the thresholds are lowered for qualitative contribution. They will feel more safe and they will start to interact and contribute. Share clear information with participants beforehand about the learning experience.

Prepare for participation - before the course starts share a checklist with participants on things they can think about in order to make their potential to fully participate higher. See example of a downloadable checklist here.

DURING THE COURSE

Camera on - seeing others helps to connect. We want to be seen, heard and recognized. And we want to see, hear and recognize others for their contribution. Encourage everyone to have the camera on.

Check-ins - people share thoughts, feelings, ideas (even if it is only in writing when we read others experiences it has a beneficial impact socially. Wellbeing hormones are released in our brains and we feel more connected with others.). See a downloadable example of a check-in here.

Get to know - meet up in a smaller group in a breakout room and share name, location, and a passion. (Craft the instructions to support people to share something personal so that they will not go into default and repeat their CV).

Reflection in smaller groups - reflection in smaller groups in breakout rooms, sharing ideas, thoughts, experiences connected to what they just heard, is a great way to socially and emotionally connect (and learn).

Methodology - convey not only the purpose, aims and agenda of a session but also the methodology. How we will work together and how that might differ from working onsite.

Clarify culture - ask people to talk about how they want to work together. What behaviours they would like to see from themselves and others during the training. This will create a clearer and safer space to engage in.

Use questions - what we also should think about is how to create questions for participants to work with when digesting and processing input. Create questions that speak to the whole person - to the Head (think), the Heart (feel) and the Hands (apply). I.e. “what thoughts, feelings, insights, ideas do you take with you from… How will you apply this back home…”. The questions and instructions need to be extra clear when working online to support people to share.

Use art - Art and music as part of a training or session can also spark emotions and really fuel the experience and generate lots of positive energy and attention. You can play music via i.e. *Spotify* and use the *Zoom* settings so that the sound is shared. You can also invite a live musician who plays some music as a mental pause. That is always much appreciated and surprising for participants. Never miss to use positive surprises to capture people’s attention.

AFTER THE COURSE

Access learning and apply - engaging emotions enhances learning retention. From a neuroscience point of view the learning goes deeper and broader in our brain when we bring the whole person into the learning experience. When we create a space for people to express what they think and feel we co-create a foundation for stronger insights and better social collaboration. The learning becomes easier to access after the course and easier to apply and make use of when we have engaged emotionally.

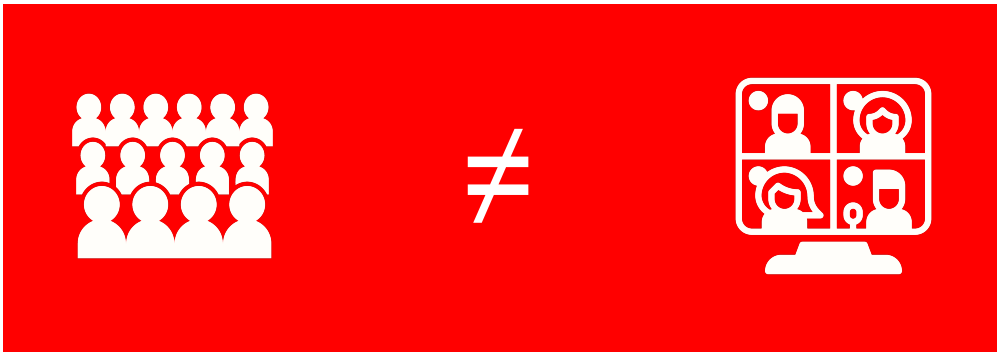
Peer-to-Peer - peer groups who meet up after a course/training and who support each other to apply learnings, is a great way to hold yourself and others accountable. You can create peer groups who meet up online i.e. once a month to share their application. You can also ask people if there are any topics that they would like to convey to each other and which support people to have their own online session where they go through best practice together online.

CREATING CLARITY

Creating Clarity in this context is about developing a structure, organising and communicating in a way that supports development of effective learning experiences in an online setting. A priority principle for your planning and design process should be to create clarity, both for the internal work and the external communication with participants.

Creating clarity supports building psychological safety for the participants, by responding to our basic social human need of certainty. Clarity minimizes potential energy spent on, for example, worries, frustration, and confusion sparked by uncertainties. Situations of certainty support participants to get fully engaged, use their energy to stay focused and to keep their attention level high.

One extensive difference between running online learnings compared to trainings in a physical space, is the setup of roles and responsibilities. To create the same quality in online trainings and sessions, as in onsite settings, one needs to have a different setup.



An online learning event could be seen as a live TV or radio production. The back office **demands more human resources** to deliver/produce the event, compared to implementing it onsite in the physical space. This is because an online training is more technology driven and depends on a number of digital tools. Having more people working together, leads in turn to an increase of relationships and the interactivity in the course delivery team. This heightens the complexity level for delivering qualitative and effective trainings.

Clear roles and responsibilities is about creating internal certainty. Having clarity about who does what and when. The quality in the internal work will in turn have a substantial effect on the clarity and psychological safety for participants.

By having a clear structure, being clear in the way you organise things and pursuing clear communication both internally and externally - you will contribute in building a real sense of certainty. This will have a substantial positive impact on building psychological safety.

If the interplay between members of a course team does not work and the transitions does not work seamlessly, it will affect the participants' experience of the learning activity to a high degree. Uncertainty triggers most people in negative ways. It can create confusion, frustration and a drop in attention level and the ability to focus. This will affect the ability to learn, and to what extent the expected outcome of the training is reached.

In an online setting there are often parallel processes going on at the same time for the people in the course team. One person is keeping an eye on the chat and is prepared to either reply to questions or comments, or notify the facilitator about it. Another team member might focus on sharing the screen with everyone and being alert to change slides, or bring slides down and share screen for another application that you might use. A third person keeps an eye on that audio is off for all participants except the one speaking, in order to avoid background noise and echoes.
We might have a fourth person who divides people into breakout rooms when needed. And of course we have the facilitator or moderator as well running the session with the participants.

In short, there is space for many different roles in an online production. Some of the above functions might be done by the same person, but being only one person is probably to plan for failure. If you are too few there is always a risk to lose control. Multitasking is a challenging option since the risk of losing the ability to focus is higher if there are too many disturbances.

This increased complexity level of having more people involved in the delivery of a training and the use of more technology also demands a more rigorous planning and preparation. There are more things that could go wrong in an online setting. A strong recommendation is to create clarity on a micro level in the design and planning process. You need to know who is going to speak when, who to hand over to, what slides to show when, when to change from one digital tool to another, how to divide participants in breakout rooms, when to copy instructions in the chat, etc.

Here is an example of a downloadable operating scheme that might support you to have control on a meticulous level, and here you will find a template of a design document that you might want to use. And finally here is an example of a detailed design document.

Another aspect of creating clarity is your planning and design process having “building psychological safety” in mind. Participants in online training are more exposed than if in a physical space. It is a greater challenge to support participants to feel included and have a sense of full participation. There is a big chance that the geographical distance creates a social distance, and it needs to be taken into consideration when planning and designing for online learning.

Since there is higher potential for participants to lose focus, design to support participants' ability to be attentive. Stress levels and the ability to be patient are affected when people get tired. People become more sensitive for potential disturbances and for larger chokes of input.

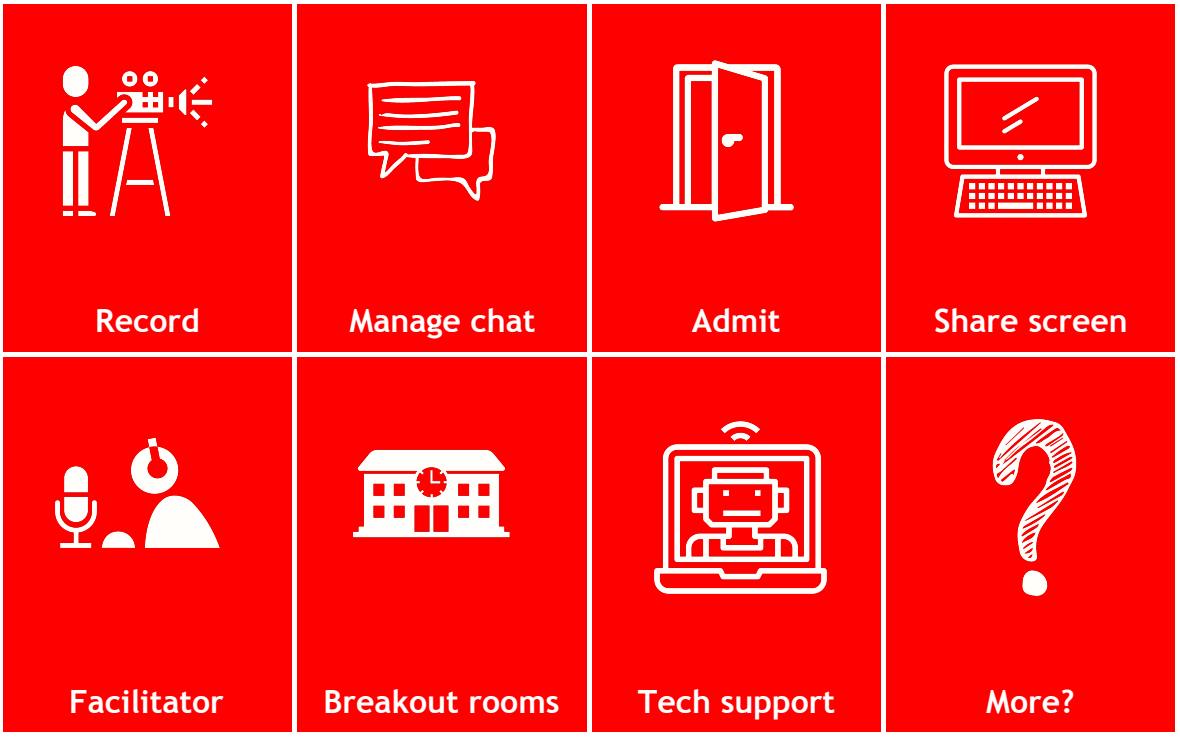
BEFORE THE COURSE

This part is about the planning and design phase of your online learning activities. It is about supporting a high level of clarity and certainty among you in your internal course team as well as towards your participants.

What to think about in the course team?

Roles and responsibilities:

- What needs do you have of the different "roles and responsibilities" for the specific training?
- Who should do what?
- Should you combine any of the "roles and responsibilities" to be done by the same person? If so, what could be combined?
- Should any of the "roles and responsibilities" be transferred forth and back between people during the online activity? If so, when and how?



Examples of responsibilities to share in the delivery team:

Recording:	If you want to record training activities, in order to have a learning resource to share or reuse, you need someone to record and keep an eye on when to start, pause and stop recording.
Manage chat:	A chat function can be used for interaction, inclusion and participation. If you want to work actively with the chat, as an interactive tool for questions and comments, someone needs to observe the chat and take necessary actions; to respond privately or to everyone, or to notify the facilitator if needed.
Admit:	Many learning platforms have functions that demand someone to admit participants into the digital learning space. This might take place throughout a session - there might be late comers or people dropping off due to connectivity issues who need to be let in again.
Share screen:	If your training is based on showing presentation slides or any other material or tools, someone needs to change the screen shared with the participants. Sometimes you want to show the full face of a speaker, other times a presentation slide, yet another time an interactive tool, etc.
Facilitator:	Someone has probably some kind of leading role for the training. Or several people sharing this and taking turns. It could be a facilitator, moderator or speaker.
Breakout rooms:	If you want to use functions to divide participants into smaller groups to work together, then someone needs to divide participants and activate the groups, as well as potentially broadcast messages while participants are in the groups.
Tech support:	You might need someone that specifically support participants with connectivity challenges, non working video or audio, etc.
More?	Due to the nature of your trainings there might be need for other responsibilities as well, i.e. a interpreter

Some tips how to organise your team:

Depending on the size of the group some of the above responsibilities might be shared by in total 3 persons. If there are larger groups (30 and above) the need of support increases and consequently the number of persons needed in the course team.

Potential beneficial combinations of responsibilities:

- Facilitator + Sharing screen
- Managing chat + Admitting participants (+ potential tech support)
- Record + Breakout rooms (+ potential tech support)

Process design and planning

Operating scheme - use an operating scheme to support as much seamless transitions and flow during a course as possible. See a template for the operation scheme here.

Detailed design - use a very detailed and meticulous design document to support clarity and certainty within the course team. You can find a downloadable template to use for your detailed process design here.

Dress-rehearsal - since there are many details to think about when running your online activity it is good to dress-rehearse at least once. Especially talk through the different transitions and situations when multiple things need to happen at the same time.

Delivery day team meetup - as a final qualitative check, a strong recommendation is for the course team to meet at least an hour before the course starts to focus and talk through the design and division of responsibilities a final time before starting.

What to think about focusing on participants?

Communication with participants

Welcome Kit - to support clarity and certainty for participants you can compile a written document communicating why (purpose), where to (expected outcome), what (content) and how (the process) concerning the course, as well as information about how the course is organised and who will participate (both course team and other participants). Send it out well in advance. You can find a downloadable example of a Welcome Kit here.

Welcome video - as a complement to a written Welcome Kit you can make a short video that you make available to participants (i.e. in a shared space like Facebook or Slack). Watch an example of a Welcome Video here. The video is uploaded on Vimeo and is password protected so you need the password “IntroductionVideo” to be able to view it.

Introduction videos - creating a short (60 - 90 sec) introduction video per person can be a way to build trust and support relationships with the ones that will deliver the course. Make them available in advance for participants to watch i.e in a shared space like Facebook or Slack, or similar. See a downloadable example of instructions for doing an introduction video here.

Tech guides - a good idea is to make short manuals and/or videos to support participants understanding the technology and digital tools that are going to be used. A crash-course

material to increase the potential of full participation in the course. Technology and digital tools can be a strong factor in limiting participation.

Activities and tasks for participants

Participant inventories - are there any pre-information you need from participants? To collect information can contribute to the quality of the design. Making an inventory among participants about their knowledge and experiences working with certain digital tools, might affect you to potentially set up a short crash-course or create a short guide to hand out in advance in order to get participants up to speed to use it. Another useful input from participants is to ask about their expectations beforehand.

Pre-sessions - A complement to a Welcome Kit and a Welcome video can be to invite participants taking part of an optional Q&A session some days before the course starts. This can support clarification for participants as well as function as relationship building, both having an effect on psychological safety.

DURING THE COURSE

This part is about the delivery phase of your online learning activities from a clarity point of view. It is about being a fully prepared course team that will have full attention on the learning experience of the participants. Make your design go live and act and do in line with your operational scheme. But be prepared to adjust your plan to potential unknown circumstances.

Plan B - be ready to change plans. Elaborate already in advance what not to prioritize if lack of time becomes an issue.

An intentional start - be clear with the purpose, objectives and the agenda of the course and communicate the direction.

Show brain friendly slides - maximize clarity for participants by having presentation material done in a brain friendly way. Communicating verbally and having text on a slide shared at the same time creates challenges for the brain to process the information. On the other hand if you only have a visualisation on your presentation slide and communicate verbally to it, it is much easier for the human brain to process it. This is especially important in an online setting where once senses already are limited.

Clear instructions in time - avoid giving too many instructions at a time. If a process is more than one step, try to give instructions for one step at a time if possible. In some

occasions you need to make sure that participants get the instructions either in the chat or as a screenshot uploaded in a shared space (i.e. Slack or Facebook). This might be the case when you send participants out in breakout rooms. You can also ask participants to use a smartphone if they want to take a photo of the shared screen as a support.

Mini-guides on tech and tools - if technology and digital tools are new for participants it could be constructive to create short simple mini-guides on “how to”, with the most basic common functionalities described to support participants to get started by themselves.

AFTER THE COURSE

This part is about the phase after delivering your online learning activities from a clarity point of view. Will there be a space where participants have access to material from the course? If digital tools were used for the sake of interaction between participants, will it remain to be accessible for the participants?

Course material - To support participants to apply learnings and insights from your course it is constructive to have a shared space with all materials saved and accessible to download. You can share material such as presentation slides, recordings from course sessions and other supporting material. Make sure that participants are aware about the existence of the shared space for course material. Here is an example of a shared space on Google Drive.

Use of digital tools - there might be technology and digital tools you have used for your course that is good to keep for participants to continue to use. If you for instance had a communication channel of any kind, i.e. Slack or Facebook, you can keep it to support potential exchange and continuous learning between the participants post course.

ENABLE PARTICIPATION AND COLLABORATION

Useful techniques on how to enable participation and collaboration in an online environment

A very high percentage of evaluations from courses convey that one of the most valuable outcomes for people is the interactions with their peers and the learning from each other. Having that in mind - how do we maximize the interaction in an online setting? How do we make sure that, as facilitators, we are not standing in the way of people generating learning together.

Having gone through some basic aspects of process design and facilitation above, and also addressing some online specifics, we would now like to share some examples of concrete tips and tricks when it comes to enabling active participation and collaborative interaction, before, during and after the session.

Below are aspects of before, during and after a course - they are about maximizing interaction, generating insights together and normalizing group development and dynamics.

BEFORE THE COURSE

Design with people's needs in mind - when we design in a way that meets people's basic social needs such as inclusion, feeling connected, getting to know each other a bit more, etc. It will lead to more contribution from the participants and their own ideas, thoughts and feelings. This will support the group to develop and engage on a deeper level, and it will open up the door to a more dynamic learning experience. We should aim to quickly reach the level where the participants feel comfortable to speak up and share opinions, disagree, offer other perspectives etc. This is a good thing and a sure sign that we are not standing in the way of the participants as designers/facilitators.

Communication channel - set up i.e. Slack for people to start interacting before the course starts.

Get to know videos - Let participants get to know each other through posting a small video about themselves. See an example of a personal introduction on video here.
The video is uploaded on Vimeo and is password protected so you need the password "PersonalVideo" to be able to view it.

Peer-to-peer - Ask people to check in with another participant to have peer to peer conversation about expectations and their intention joining the course. Creating safety by an interactive check in with another participant often has an increased effect on the sense of trust in the whole cohort.

DURING THE COURSE

Learning culture - let participants co-create a word cloud of what might be helpful behaviours for a great work environment in the beginning of the course (with i. e. Mentimeter).

Less input, More interaction - let people have longer conversations in smaller constellations in breakout rooms. In that way they can digest what is covered, they can make sense of it by connecting it to what is already known .They share what they think, feel and would like to do when applying the learning. All of this strengthens the learning and the retention of the learning.

Use chat function to share - ask people to share their experiences, ideas, insights, thoughts, feelings in a chat. If you are under time pressure, it will be better to take 2 minutes to let people share in the chat than not sharing at all. Having participants to speak when everyone is in the same digital space increases the chances of disturbing background sounds and having verbal sharing demands a strict control on muting and unmuting microphones and doing it in the right order (i.e. who speaks after who).

Mixed groups - mix and mingle during the day so that people can meet quite a few peers in breakout rooms during the course/session. This will support exchange of experiences and insights and establishing a longer lasting network among participants.

Trust people in the breakout rooms - when we work online in a combination of the main room and smaller breakout rooms, we need to have trust that people can handle the situations they co-create. It is important that we do not jump in and out of breakout rooms to check things out too much. People can call for you as a facilitator via the help button in the breakout room in Zoom.

AFTER THE COURSE

Ongoing connections - support ongoing connections after the course, for instance by letting an existing communication channel for the course continue to be accessible for participants.

Fixed peer groups - create fixed peer groups to support development and application of learning. We know that when people meet up regularly to follow up on their intentions, the likelihood of really applying the knowledge exponentialized. Having regular check-in's online takes less effort than showing up together somewhere and the benefits are just the same.

Extra sessions? - when you have a platform where people can continue the conversations after the course you can use that platform (i. e. Slack) to inspire people, probe explorations, ask questions etc. to make the conversation keep going. You can also listen to people's needs and ask what 'deep dives' they would like to do if they were to choose from some topics. People's engagement increases when they get a choice. Having had a poll you can book an extra digital session on the chosen topic/-s in order to go deeper in smaller groups.

EMBRACE TECHNOLOGY AND DIGITAL TOOLS

Online learning is by nature more technology driven than training in the physical space. As a facilitator/moderator you can run a training session in a physical space without using any kind of technology, while you can't do online training without technology. So doing online training demands an approach and attitude from you to embrace technology and to support your participants in embracing it as well.

In relation to use of digital technology and tools we live in a high-speed world constantly exposing us to new tools and features. When you work with online training you need to plan for being curious about new technology and digital tools, unless you already are a very curious person trying out new things constantly.

Another advice is not to choose digital tools for the sake of it. Be very conscious of what you desire from the tools in the training you are planning for. Do you want it to support a high level of interaction and participation? Do you want it to allow for creativity and ideation? Do you need your participants to vote or do polls during the training?
Ask yourself about what digital tools you need to support the purpose of your activities.

The examples of digital tools we choose to present below are mainly chosen based on functionalities for interaction, participation, inclusion and for using the collective intelligence among participants. We also have added a specific tool for keeping learning material available in one space. And finally also a tool to run online evaluations

TOOL	INTRODUCTION
zoom	**Zoom** is an online video conferencing tool with a local, desktop client (for computers) and a smartphone app. You can run online meetings and trainings with Zoom. Key features (excluding the video conferencing part) are breakout rooms for collaboration in smaller groups, chat-function for questions, comments and sharing of information, simultaneous translation, video recording and sharing screen for presentations. There is a basic version that is free of charge, but limited to only 40 minutes conferencing if 3 persons or more. www.zoom.us

	Slack is mainly an online-based communication and collaboration tool. It is designed for instant messaging between people that are part of the same workspace. Either you can choose to chat in channels (which is group chats that you can create yourself based on themes, tasks, etc) or direct messaging person to person. There is a free version, with limited number of features. www.slack.com
Mentimeter	**Mentimeter** is an online-based tool for different kinds of real-time interaction with participants. You can create questions that get compiled in different ways such as a word cloud or a floating text document. There are possibilities to do real-time polls and quizzes. Participants give input via smartphones or computer. There is a free version, with limited number of features. www.mentimeter.com
	JamBoard is an online-based tool where you create working platforms called Jams. Jams is like an online version of a whiteboard. You can sketch, add images, but also add digital post-its on it. It enables collaboration like ideations or a reflection tools for individuals using digital post-its JamBoard app is free. www.jamboard.google.com
	Google Drive is a file storage and synchronization service.It allows you as a user to store files on the Google Drive servers, set up folder structures, synchronize files across devices, and share files. It is free of charge. www.google.com/drive/
Google Forms	**Google Forms** is a tool that allows collecting information from users via a personalized survey or quiz. The information is collected and automatically connected to a spreadsheet. Google Forms comes free with a Google account. https://docs.google.com/forms

BEFORE THE COURSE

IN GENERAL:

Course team:

What technology and digital tools? - Be conscious about what tools to choose - don't choose tech for the sake of tech - choose based on what you plan to do in the training.

Try out technology and tools - Test the technology and digital tools you will use in order to familiarize yourself and develop a trust in using them in a live situation. Remember also that practise makes perfect!

ZOOM:

Course team:

Sign-up to Zoom - Create a Zoom account. There is a free version, but it is limited, i.e. you can have a 40 min group session for free. A recommendation is to have at least a subscription of the pro-version.

Breakout room plan - Make a plan when you will divide participants in smaller teams. Make also notes if it can be random groups or fixed groups, since this will matter for the one who will prepare the breakout rooms. Make also sure to enable the allowance to use breakout rooms in the settings in Zoom. See a more specific guide for use of breakout rooms in Zoom here.

Invitation - You can invite participants directly from Zoom by choosing a function that participants need to register. Or you can provide them with a direct link they only need to click on. You can choose to activate the need for a password and you can also enable a waiting room, which means that participants that log in with the use of the link will be on hold until you admit them into the Zoom space you will use for the training. You can activate the password function in the settings and you can activate the waiting room either in the settings or directly in the menu in the Zoom window. If you activate the password make sure to share it with the participants.

Plan for responsibility - Make sure you have divided the different responsibilities needed within the course team. Who will share the screen? Who will admit participants? Who will create breakout rooms? Who will manage the chat? Who will support participants with connection issues?

Set up your space - Think about what background (in your own physical space) you will have when the course is running and videos are turned on. One recommendation is to have it fairly neutral not to

take attention away from participants. Also think about the light. You should avoid having strong light shining into your camera.

Participants:
Send out Cheat-sheet - Support participants in being prepared working in Zoom by providing a cheat-sheet. You can find it here.

Prepare for a 3 min crash-course - Before you kick off the course you can offer participants to log in a few minutes earlier and talk about and show a slide or two with some common features that are useful to know about during the course. See an example slide here.

Q&A session? - One way to support participants getting used to Zoom is to have a short specific Zoom Q&A session before the course. It can be entirely based on their questions, or a setting trying out functions together.

Download app - Instruct the participants to download the Zoom app from zoom.us to the device they will use for the course. Preferably participants shall use their computers in order to have access to all features of Zoom. Also instruct the participants to open the Zoom app on their computer and follow instructions to install it.

Checklist - Share a document to participants on how to potentially make sure to have a smooth situation for participating mainly from a technology point of view. See example of a checklist here.

SLACK:

Course team:
Create a workspace - If you are going to use Slack as a communication channel for your course participants, you need to set up a workspace. It would be good to do it well in advance of the course and invite the participants to start to interact with each other. See a screenshot of a workplace here.

Manage Slack - Will you actively work with engaging participants in your Slack channel? Or will you leave it completely to the participants? Sometimes it can be challenging to get a communication tool up and running. Participants might be active in many different kinds of social media tools and other tools for interaction. It can be worth thinking about what activities you can initiate or which approach you can take as a course team role modeling the use of Slack.

A closed course team channel - You can create closed channels in a workspace in Slack. It can be good for you as a course team to have your own channel to interact in for specific questions and issues related to the course you do.

Send invitations - Each participant in a course needs to get an invite to access the workspace. You can invite participants directly in Slack, but you can also email an invitation link.

Define purpose - Have an agreement in the course team for what kind of communication you will be using Slack. Should it replace emails completely? Is there any kind of information you think is sensitive to post in Slack? Should you post all course material in the Slack workspace?

Participants:
Download app - Participants should download Slack preferably both to their computers and also smartphones if they have.

Slack introduction - Share initial information on how Slack works and how you are planning to use it during the course. See an example here.

What channels to use for participants? - In a workspace on Slack you have a number of standard communication channels, but you can also start new channels. Review what different channels you might need. I.e. "announcement" - channel for all formal communication from the course team to participants and "video-presentations" for each participant and course team member to upload a short personal presentation video.

MENTIMETER:

Course team:
Mentimeter, for what? - Decide for what reasons you want to use Mentimeter and what function/s you want participants to work with.

Create your version/s - Prepare the functions that you will use during the course. It is good to have them prepared at least before you have a dress rehearsal. Integrate it in your presentations slides. See examples here.

Test your Mentimeter features - Run a test procedure together with others from the course team. Let someone try out the features you have prepared. You can reset the result after testing so it is fully ready to be used with participants.

JAMBOARD:

Course team:
Jamboard, for what? - Decide for what purpose you want to use a Jamboard. Be clear about it!

Create your version/s - Prepare the appearance of your Jamboard/s. It is good to have them prepared at least before you have a dress rehearsal. JamBoard can get a bit slow with more than 20-25 users in the same JamBoard document. You can set up several copies if more participants. See examples of different appearances here.

Integrate in presentation - You need to share the links to your JamBoard/s with participants. Either add to an operating scheme if you have one or save your copies in the speaker note of your presentation slides. See example here.

GOOGLE DRIVE:

Course team:
Google Drive, for what? - Decide for what purpose you want to use Google Drive. Be clear about it!

Set up a folder structure - Make a plan for how you want to structure your folders and decide about accessibility (if the folder and documents should be fully accessible or if it should be limited in any way). There are different levels of accessibility you can apply for each of the documents and folders. You might want some to be limited and some open.

GOOGLE FORMS

Course team:
Decide what to evaluate - Before you set up a Google form decide what it is that you want response on.

Set up your evaluation - When you have a clear mind of what to evaluate, create your questions and in what form you want your answers. See examples of an evaluation created in Google forms here.

DURING THE COURSE

IN GENERAL:

Course team:
Clear communication - Use of technology for meetings in the virtual space have challenges and limitations. The part of the course team that speaks with participants is recommended to have external microphones to improve the audio quality, and when using video one should think about one's own communication and how it can be balanced not being able to show one's full body language (which is a huge part of communication).

Expect technological challenges - Expect some technical challenges to arise. It will potentially support you to act calmly if it happens and then you can be more methodical about it.

ZOOM:

Course team:
Remind about functions - If you have participants that you know are not that aware about Zoom and its functions, you should support them by i.e. doing a short crash-course in the beginning of the course (just show the most common features that are important for their participation). See an example here.

Stick to your responsibilities - Follow the agreement you have done pre course. If you are assigned to divide participants into breakout rooms, keep your attention to it. Don't get tempted to get into the chat and answer questions for instance. It might become confusing for participants!

Play music - Use the possibility to play music on Zoom. There are settings that will support good audio quality. Music can potentially add value to learning experiences. See instructions here.

Participants:
Use rename - Have participants write their full names when logged in on Zoom. It supports knowing if there are any unauthorized persons logged in and it can support the one dividing participants into the breakout rooms. Zoom only allows for pre-created breakout rooms if everyone has a paid account or come from the same organisation. However there are ways you can be creative when it comes to dividing participants into different rooms. It has to do with the rename function. Read more here.

Use of breakout rooms - A strong recommendation is to use breakout rooms. It is a great way to support inclusion, participation and the use of collective intelligence within the group. Read more here how you can work with breakout rooms.

Use chat - In the chat one can write messages to everyone or privately to any of the other participants or course team. The chat can of course be used for questions and comments, but also constructively for participants to share learning, insights back to everyone after having worked in a breakout room. Depending on how many participants there are it might be better to share only in writing when all participants are in the same digital space (while in breakout rooms only verbal). Unmuting and muting microphones forth and back can let background noise in and in can potentially become a bit messy.

SLACK:

Course team:
Manage Slack - You might not need Slack that much during a course session, unless you ask participants to share or post things in there, but for posting in Zoom you better use the chat function. However if Slack is your communication channel you might get potential messages there from participants that have problems accessing Zoom.

Participants:
Use if disconnected - You can communicate Slack to be the channel participants shall use if they have problems logging into the video conferencing platform you are using for your session.

MENTIMETER:

Course team:
Share the link/s - When using Mentimeter you need to share the url www.menti.com) and the code/s that you have received that must be used to enter the specific menti slide/s you have prepared. If using Zoom share in the chat (and if you use breakout rooms share before you send participants out in the rooms).

Transition to Mentimeter - If you have presentation slides up and running before using Mentimeter you can create a Mentimeter slide with the information needed for participants to kick off the process at once, not needing to wait for you to stop sharing screen and upload the Mentimeter result slide (you can do that while they are answering in the Mentimeter). See example here.

Read out loud - When participants share in a chat as part of your learning process (i.e. share insights from a group work, share individual perspectives based on a question) you can read out loud examples of what comes up in the chat. This can be good in general to strengthen taking part of each other's work or thoughts, but also if you have participants that are visually impaired.

Participants:
Remind about submit - When a participant has filled in information in Mentimeter he/she/it needs to click the submission button. It can be good to remind about this

Use of answer alternatives - In Mentimeter you can mark if participants can provide multiple answers or a single answer. See examples here.

JAMBOARD:

Course team:
Clear instructions - Share screen and show how you expect participants to work in JamBoard. Show how to create a post-it, how you can resize it, highlight the possibility to clear a frame and not do so accidentally and if so, to use the reset button. If you use several links due to that you have many participants be clear with instructions who works on which board.

Share the link/s - When using JamBoard you need to share link/s with the participants for them to be able to use the boards. If using Zoom share link/s in the chat (and if you use breakout rooms share before you send participants out in the rooms).

Transition to JamBoard - If you have presentation slides up and running before using JamBoard you can create a slide with the necessary instructions needed for participants, but first introduce JamBoard by sharing it on the screen, then you can show the instructions - or talk about them and share in chat - or bring up your slides again. See example here.

Read out loud or scrolling - When participants share in a chat as part of your learning process (i.e. share insights from a group work, share

individual perspectives based on a question) you can read out loud examples of what comes up in the chat. This can be good in general to strengthen taking part of each other's work or thoughts, but also if you have participants that are visually impaired. In JamBoard you can also ask participants to individually scroll around and read to get an overview of what has been done.

Participants:
Use for ideation - JamBoard can ideally be used for moments when you want participants to generate ideas about something. Imagine for which activities you use post-its in the physical space. When bringing those activities into an online space, consider using JamBoard. When you want participants to process content of any kind and share insight, learnings and thoughts you should probably not use JamBoard for that because the focus should be on listening to each other.

Use for individual input - JamBoard can ideally be used for any kind of individual exploration (maybe based on a couple of questions) and then you can use post-its to come up with your answers and thoughts.

GOOGLE DRIVE:

Course team:
Material at hands - Share documents that participants need during their current session on Google Drive. Share the link to Google Drive and instruct participants to get access to the material needed.

Participants:
Hand in material - If you want participants to submit material during the training you can set up a folder on Google Drive and give participants access to upload material.

GOOGLE FORMS

Course team:
Fill in during training - Rather than sending out a link to an evaluation form after a training you can add some time in the training to have participants fill it in at once. Just share a link to the form you have prepared. See example of evaluation here.

AFTER THE COURSE

ZOOM:

Course team:
Save chat - If you have used the chat to share learning, insights, ideas etc. then download it and clean up the document from time indications, etc. so only relevant information remains.

Save recorded material - If you have video recorded parts of the session, download and save.

Download attendance - If it is valid for you there is an option to download information on who attended the session.

Participants:
Access to material - Access to material - written and recorded - for further use in their own organisation.

SLACK:
Course team:
Manage Slack - If you aim to use Slack for the participants after the course, to network and continue to learn from each other, you should consider having some kind of support mechanism to stimulate that people are using it. Could i.e. to send out inspirational material or to just post follow up questions that might spark dialogue and sharing between participants.

Participants:
Post course tasks - If participants have gotten either mandatory or optional tasks, Slack can be a useful workspace to support exchange of information, posting things and asking for feedback, etc. If participants do group work post course they can set up their own channels for their specific groups to collaborate.

MENTIMETER:
Course team:
Download and upload - If you have used Mentimeter to collect data and input from participants, you can download it as either Excel file or PDF. Preferably share with participants post course.

JAMBOARD:

Course team:
Structure, download and upload - If you have used JamBoard you should first review the input and prepare for it to be able to download - i.e. making sure that post-its are readable by having enough size and see if there is to long texts on any post-its that are not shown fully, it so you might need to edit or divide in two post-its. When done you can download as a PDF and preferably share with

participants if valid.

GOOGLE DRIVE:

Course team:

Upload material - Upload all relevant material from the course - slides, input from participants, recorded sessions, templates to support participants in their further work, etc and make material accessible for participants - either by inviting them specifically by their email addresses or open up the channel for anyone with the link to have access. Make sure to use the setting "view", which means that participants can download, but not edit documents.

Send out reminder - Support participants being aware about the material as a resource in their work and development by sending out a reminder a period of time after the course.

GOOGLE FORMS

Course team:

Send out reminder - Preferably you did the evaluation as part of the course, but if everyone did not answer, send out a reminder to get as many answers as possible.

Download - You can download either as a CSV-file or as a PDF to save and use actively in the continuous work creating qualitative and effective training.

4. EXTERNAL MANUALS

External resources to find in depth information about the digital tools presented in this guide for online trainings and activities:

Zoom:

https://support.zoom.us/hc/en-us

Zoom Online Trainings:
https://support.zoom.us/hc/en-us/sections/201740096-Training

Zoom Breakout Rooms User Guide:
https://support.zoom.us/hc/en-us/articles/204772869-Zoom-Rooms-User-Guide

Slack:

https://slack.com/intl/en-se/help/articles/218080037-Getting-started-for-new-members

Mentimeter:

https://help.mentimeter.com/en/#question-types

Jamboard:

https://support.google.com/jamboard/?hl=en#topic=7383643

Google Drive:

https://support.google.com/drive/answer/2424384?co=GENIE.Platform%3DDesktop&hl=en

Google Forms:

https://support.google.com/docs/answer/6281888?co=GENIE.Platform%3DDesktop&hl=en

PART 2:

THEORETICAL FRAMEWORK

-Theories and models to support online learning

Theories and models to support online learning

BUILDING PSYCHOLOGICAL SAFETY

The social brain

The human brain is a social organ. Our reactions are directly shaped by social interaction.
The brain experiences everything first and foremost as a social system. Our basic social human needs can be explained with the SCARF model, created by David Rocks and his neuroscience colleagues at the Neuroleadership. The model is built upon three central ideas:
1. The brain treats many social threats and rewards with the same intensity as physical threats and rewards (Lieberman, & Eisenberger).
2. The capacity to make decisions, solve problems and collaborate with others is generally reduced by a threat response and increased under a reward response (Elliot).
3. The threat response is more intense and more common and often needs to be carefully minimized in social interactions (Baumeister et al).

When people feel i.e. unrecognized, not appreciated for their contribution, they experience a neural impulse as powerful, painful and real as any physical injury. They have learnt to “temper” their reactions, but they will also limit their engagement and become reluctant to give more of themselves because of the less safe social context.

Learning designers and facilitators who understand this dynamic can more effectively engage participant’s full potential, support collaborative interaction, and create a culture that feels safe and encourages continuous learning. When we use our ability to design intentionally addressing the social brain we are in the service of optimal learning outcomes.

Triggering the threat response or reward response

When we encounter something unexpected, like a new colleague moving into the next office, the limbic system (a relatively primitive part of the brain) is aroused. Neurons are activated and hormones released as we seek to learn whether this new entity represents a chance for reward or a

potential danger. If the perception is i.e. uncertainty the brain interprets that as a danger, and the response becomes a threat response - an avoidance response. If the perception is looking forward to getting to know the colleague, the response becomes a reward response - a toward response.

When we design onsite or online sessions triggering too many threat responses, people's brains become less focused and functional. But when we make people feel good about themselves, clearly communicate expectations, give people latitude to make decisions, support people's efforts to build good relationships, and treat all people fairly, they prompt reward responses. People become more engaged, more open to ideas, and more creative. They are less susceptible to negative stress, and they feel intrinsically rewarded.

Understanding threat and reward responses can help us design effective learning experiences. The brain is highly plastic. Neural connections can be re-formed, new behaviors can be learned, and even entrenched behaviors can be modified at any age. But the brain will make these shifts only when it is engaged in mindful attention, the state of thought associated with observing your own mental processes. In a threatened state, people are less focused and immersed in learning, as their attention is diverted.

The SCARF model

Five social qualities enable people to minimize the threat response and enable the reward response: status, certainty, autonomy, relatedness, and fairness (SCARF). Think of these as headgear that we can wear to prevent exposure to dysfunction.

1. Status. We constantly assess how social encounters either enhance or diminish our status. If you think that you compare unfavorably to someone else, the threat response kicks in. High status correlates with longevity and health. Understanding the role of status can help us avoid practices that stir counterproductive threat responses. For example, performance reviews provoke a threat response—unless extremely participative and well designed. Status is enhanced when people receive appreciation, master a new skill, and feel recognized and respected.

2. Certainty. When we encounter a familiar situation, our brain conserves its energy by shifting into automatic pilot (established neural connections have hardwired this situation and our response to it). This makes it easy to do what we have done in the past, and it frees us to do two things at once; for example, to talk while driving. But the minute the brain

registers ambiguity or confusion, the brain flashes an error signal. With the threat response, we must stop talking and shift full attention to the road. Uncertainty registers as an error, gap, or tension: something that must be corrected. Not knowing what will happen next can be debilitating, diminishing memory, undermining learning, and disengaging people from the present. Of course, mild uncertainty attracts interest: New or challenging situations spark curiosity and energy to solve problems. The perception of too much uncertainty undercuts effective learning.

3. Autonomy. The perception of greater autonomy increases the feeling of certainty and reduces stress. Supporting people's need for autonomy gives them latitude to make choices. Presenting people with options, or allowing them to organize their own work, creates a sense of autonomy.

4. Relatedness. Fruitful collaborative learning depends on healthy relationships, which require trust and empathy—and trust and empathy are shaped by whether people are perceived to be part of the same social group. Teams of diverse people must be put together in a way that minimizes threat responses. Trust can't be assumed or mandated, nor can empathy or goodwill be compelled. These qualities develop only when people's brains start to recognize former strangers as colleagues of the same cohort/friends. Striving for inclusion and minimizing situations in which people feel rejected create a collaborative culture.

5. Fairness. The perception of unfairness stirs antagonism and undermines trust, while the experience of fairness produces reward responses. The perception of unfairness creates a culture hostile to trust and collaboration. Having favorites or who appear to reserve privileges for people who are like them arouse a threat response in those outside their circle. Fairness is served by transparency. Sharing information in a timely manner can keep people engaged and motivated.

Designing and facilitating with SCARF as a map and compass

Every design decision and facilitation action either supports or undermines the perceived levels of status, certainty, autonomy, relatedness, and fairness. Our being and doing is filled with social meaning, interpreted by participants. Our sentences and gestures are noticed and interpreted, magnified, and combed for meaning.

The less clear we are, the bigger the gap for interpretation. With less senses involved in online learning experiences (i.e. harder to read body language) the risk of an interpretation going off track and unnecessary threat responses kicking in is bigger. That is why designing with the social brain as a map and compass is so effective.

The SCARF model helps alert you to people's core concerns and shows you how to calibrate your words and actions. For example, people rarely support initiatives they have no part in designing, as doing so would undermine autonomy and status. Proactively adopting an inclusive planning process can prevent the sabotage that results when people feel they play no part in change that affects them.

The more practiced you are at reading yourself, the more effective you will be reading other people's needs. For example, if you see that micromanaging threatens status and autonomy, you'll resist your impulse to gain certainty by dictating details. Instead, you'll seek to disarm people by giving them latitude to make their own mistakes. When we are self-aware, it gives others a feeling of safety. It makes it easier for them to focus. Being open, transparent and spontaneous creates an authentic presence. This approach minimizes status threats, increases certainty, and creates a sense of fairness.

The AGES model of effective learning

Neuroscientists have discovered that the level of activation of a brain region called the hippocampus during an encoding task plays a significant role in whether people can recall what they learned.

Many studies have since been undertaken that explore the types of activities that do and don't activate the hippocampus. This new understanding of the biology of learning is providing rich insights into how we can more efficiently create long-term memories as part of a learning experience.

A number of surprises have emerged from this thread of research. It turns out that some of our long-held assumptions about learning, such as the importance of repetition, are incorrect. We have also begun to recognize the importance of overlooked factors in learning, such as the significant impact of spacing out a learning activity.

The recent findings about memory formation is put into one easy-to-remember model, called AGES.

This stands for Attention, Generation, Emotion, and Spacing. These four variables may be the key to maximizing learning experiences. With just the right amount of attention, generation, emotion, and spacing, learners intensely activate their hippocampus, which creates deep circuits for easy retrieval. This model can help learning designers improve their learning

initiatives by focusing on, and experimenting with, the key variables to effective learning.

Attention

Good learning situations involve paying close attention to something relevant and interesting, with enough of a challenge to keep our attention. Making learning a greater social experience may be a key to improve learning effectiveness.

Generation

Both psychological and neuroscientific research show that the key to optimizing learning and building long-term memory is to create 'ownership' of learning content. This ownership or 'generation of own learning' occurs when an individual is motivated to understand, contextualize, retain, and apply knowledge in their own way. This act itself creates a rich set of associations, activating the hippocampus. What does this mean to me? How does this affect me? How can I use this information in the future?

Asking the learner questions triggers retrieval of the recently learned information and improves long-term retention. Asking the learner to visualize situations in which they could apply their new learning, or to make decisions within the context of the new data, also helps reinforce what has been learned. Again these tasks increase associations in the brain.
Structuring learning initiatives with these findings in mind might mean less teaching, or presentation of information, and more time dedicated to the self-generation of learning with the goal of building more personal associations with existing knowledge for easier retrieval.

Emotion

The way in which emotion is thought to enhance memory is twofold. First, emotional content is thought to grab the attention of the individual, and hence help to focus attention on the emotional event or stimulus. Second, it is known that emotion leads to activation of a brain structure called the amygdala which sits directly in front of the hippocampus and can help to signal to the hippocampus that a particular event is important.

There are difficulties with using strong negative emotions to burn in memories though: negative emotions also reduce creativity, innovation and willingness to change, so while people may learn, they are less likely to innovate. Also, the brain's organizing principle is to minimize threat and maximize reward.

While it is easier to invoke negative emotions (5 times easier to awaken a threat-response) there are ways to consciously choose to support reward-responses. Based on the SCARF model, there are ways to generate

strong rewards by increasing people's sense of status, certainty, autonomy, relatedness, or fairness.

An increase in relatedness, which also activates primary reward functions, can come from creating situations where people get to connect deeply with others and experience emotional resonance, where they experience a sense of connectedness with others.
There is also strong evidence that positive anticipation has an impact on the formation of new learning positively, so a good aim is to make learning enjoyable instead of a mandatory event.

Spacing

We grow our memories. It has been known for some time that distributing learning over time is better than cramming learning into one long study session. The same study time, spaced across different sessions, increases long time memory and learning. Massing, defined as larger blocks of learning in short periods of time, increases short-term performance, which easelly can mislead learners (and teachers) to think that the learning impact of massing is superior to spacing. There is evidence that initial testing of newly learned items, with a small delay after the learning event, will further drive the building of long-term memory as this causes an additional retrieval effort.

In addition to the 'active part' of the learning, spacing allows the brain to further digest new content and over time build and wire new connections, even when learners are at rest. The ultimate spacing is actually sleeping. The sleeping brain reactivates circuits, actively forgets irrelevant information and integrates new and old during REM.

Reflection as a learning designer and facilitator

- How can you help others to increase attention/be more focused in a learning situation online?
- What can you do for others to support the generation of new learnings online?
- How do emotions affect others in online learning situations? What can you do to support others to create optimal emotional activity to strengthen online learning?
- How can you make sure that you practice enough spacing in an online learning design?

ENABLE PARTICIPATION AND COLLABORATION

Process design and facilitation that support active participation

Process design and facilitation are important skills that are becoming increasingly important in a world of complexity and constant change, as stated in the beginning of this guide. The ability to design and lead collaborative processes enable people to learn more effectively (and increase potential to come with innovative solutions to our most pressing challenges).

Process design refers to, in this context, the planning, preparing and implementing of learning experiences that are outcome-oriented and collaborative.

Facilitation refers to, in this context, practice of leading learning groups through processes toward enhanced learning through encouraging participation, ownership and creativity.

The two practices are similar and closely linked but there is an important distinction: process design is all about understanding the need, planning the process, and preparing everything that might be needed. Meanwhile, facilitation is all about leading the planned process and also being able to read the needs in the moment, be flexible and tweak the process to make the most of the learning experience - while being true to the purpose and desired outcome of the session.

To be able to, in an online environment, focus on the delivery of what was planned but also sensing needs, responding to what emerges and (very often!) changing the plan on the fly, calls for even more detailed pre planning so that I know my options and the effects of changing something.

When it comes to creating digital experiences a good mantra to live by is make it shorter and simplify. Less is indeed more when it comes to digital workshops. Below are some useful tips and guidelines for effective, onsite and online, process design and facilitation.

Process design guidelines

1. Focus on purpose and desired outcomes

When planning an online workshop, keep the purpose and desired outcomes top of mind. Why are you doing this workshop and what do you expect the result to be. This mindset helps guide all of the tiny decisions

in the planning process from order of activities, to timings, to documentation.

2. What are your driving questions?
Almost any interactive workshop will be driven by some kind of core question/questions. For example, a reflection workshop might be driven by "What did I learn?" A speaker session about networks might be driven by "How do networks work and how can we harness our networks?" A project team workshop might be driven by "How can we solve this problem?" Think about the question(s) at the heart of your purpose and use them to start to build your online workshop.

3. What will happen before, during and after the workshop.
It's simple, but it can be easy to forget to properly plan how we meet the needs of people before, during and after the session. Consider: how will you welcome participants? Introduce the workshop? Create engagement? How will you summarise at the end? Create a sense of closure? Identify next steps? Support people to connect and engage after the workshop?

4. Be a time pessimist, specifically in an online setting!
Managing time is one of the most challenging aspects of leading an online workshop. When planning. Build in margins. If you think something will take 5 minutes, it's often best to allocate 10 minutes just in case. Be thoughtful about timings when you plan. Make sure you do not plan for too long time slots for an online workshop. It is harder to keep attention up online. Make sure your input sessions are not longer than 10-15 minutes. Mix in interactive dialogues in breakout rooms in between input parts.

5. Create a minute by minute schedule. Run through it in your head. Then out loud.
Planning a workshop is like building a story. Once you've created the story, walk through it in your head, thinking through each step in detail. Create a minute by minute spreadsheet of the design. Then, talk through it with a colleague or friend. Practice what you'll say. Check how long the input parts take. This will help you build confidence and identify possible gaps in your planning or areas to make adjustments to the flow of the online experience.

Facilitation guidelines

1. Open with intention
The first few minutes of an online workshop are crucial. Start by welcoming participants and making them feel comfortable. Then support people with some practical guidelines to participate in an online environment (sound off, camera on, name displayed etc.), clearly introduce the frames of the workshop including: purpose, desired outcomes, agenda, expectations, methodology and timings. Participants are way more likely to engage when they feel welcome and have all the contextual information. Do not talk for too long so people slip into a

listening mode. Try to quickly get participants to interact in a digital breakout room to i.e. check in, share a little bit about themselves before you start the first input part of the session.

2. Embody the energy you want to create

In an online environment you need to be specifically present and clear with your energy and expressions. A strong presence will somewhat compensate for the lack of body language to interpret, compared to when we work onsite. Participants will naturally mirror the mood and energy of the facilitator. Embody the kind of energy you wish to create within the group. Be open, engaged, and attentive to others. The participants will follow. This is true for both onsite and online learning.

3. Be honest, transparent, real

Sometimes as a facilitator it's easy to feel like I must have all the answers, to be the expert, to have everything perfectly under control. Do not fall into this trap! It's okay to say "please share in the chat your perspectives on this question/topic and then we can all generate multiple perspectives on this", or say "I don't know" or "we'll have to look into that." Always be honest and open. This will build trust with participants and you role model a great learning approach yourself. You are there to explore together. Not to outsmart each other. Not knowing is a great start for learning.

4. Facilitative behaviours

When you're 'on the floor' there are a few key tools to use to help guide the process forward. Ask open questions to stimulate thought and discussion; paraphrase participants to help clarify ideas, invite and encourage participation to generate inclusion, and summarize to help land key points. In an online setting with larger groups create the interaction between people in breakout rooms or ask people to write in chat. Lengthy conversations or presentations with a few dominant voices in the virtual room will make people dip in energy and focus. Once you have lost people it is harder to get them back and engage online.

5. Balance order and chaos

Collaborative processes are, by nature, unpredictable and non-linear. This can sometimes make them feel chaotic and messy, which can create a feeling of lack of control for the facilitator. Don't let this stress you! Accept a little chaos as part of the process, trust the participants, and use your judgment to structure the chaos, as needed. There might be technical issues, people dropping in and out, there might be a greater need to understand the instructions (even though you yourself think you have been very clear). Keep your calm and be generous with repetition and post instructions in the chat before you let people go into breakout rooms.

6. Close with clarity and a view to what's next

The final few minutes of a workshop are as important as the first few. Create a closure by asking people to share takeaways, share appreciation, perhaps summarising what has happened, thanking or congratulating the group for their work and explaining the next steps or expected actions that participants or others will take. Support people to connect beyond the session in an online setting.