Best Practices for Facilitating an Online/Virtual Workshop

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"Think of webinars as a radio show with visuals." – Andy Goodman, The Goodman Center

Set clear expectations

Welcome to the CFE Staff Meeting.

We will start at 12:30 pm.

Please make sure you are on mute to reduce the background noise.

Have a slide or word doc open and shared as participants join the meeting to let them know what is expected.

- If lots of participants will be joining/unjoining turn off the "entry and exit tone" feature ahead of time.
- Have a slide with "thoughts to ponder" or an activity for participants to do while waiting for the webinar to start.
- You can also turn on "Mute on Entry."
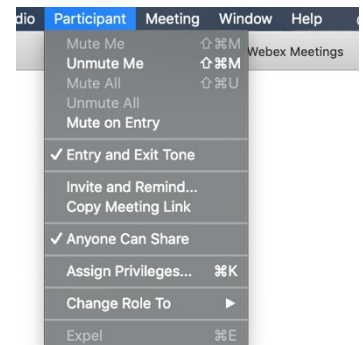
Depending on participants' familiarity with the technology, you can also show a graphic that points out the features you'll ask them to use (e.g., raise hand, polling)
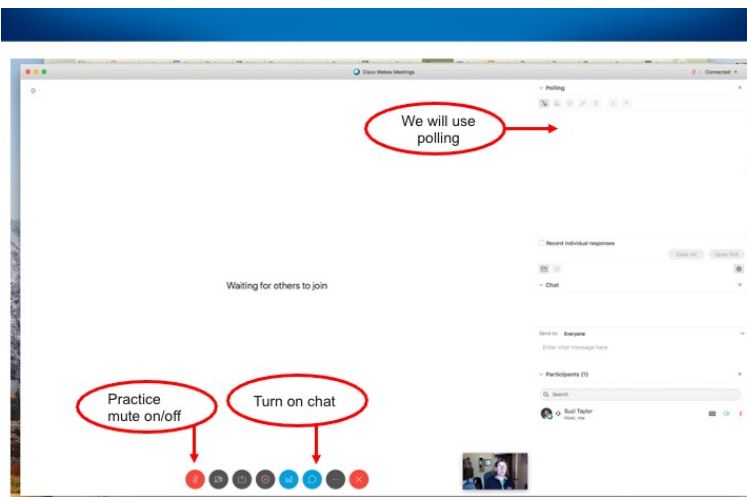
- If you suggest viewing videos in a certain style (e.g., "Brady Bunch") let them know how to do that.
- Let them know if you plan to use polling and where it will be on the screen.
- Let people know ahead of time that the session will recorded (and their contributions, as well).

Have a clear agenda and remind people where you are in the agenda

Today's Schedule

Time	Subject
9:00 am	Overview of the Process and Sessions
9:15 am	Introductions and Working Groups
9:45 am	Reading your Funding Opportunity Description
10:30 am	Break
10:40 am	Proposal Summary/Specific Aims
11:00 am	Agency Specific Discussions
11:55 am	Wrap-up

• Share an agenda on the screen and go through it as well as sharing ahead of time.
• You can return to the agenda slide when moving from section to section and point out where you are on the agenda.

What do you expect of participants?
• Talk about how you would like the interactions to go. Do you want people to raise their hand or speak up or ask questions in the chat window? Are you going to have breakout sessions. How will that work?
• If you are going to have people speak, do you want them to turn on their video when they speak?
• How are you going to follow-up after the workshop?

Keep it personal.

While there will be a group of people on the webinar, they are all listening as individuals so speak to them as if you are speaking to the individual.
• "Welcome! I'm so glad you joined us today." Rather than "Welcome everyone!..."

If you have a smallish group, ask everyone to share something about themselves or their experiences that relates to the workshop so that people get to know each other and see a face with the voice.
• Call on people so there aren't awkward pauses. A suggestion could be to go in alphabetical order as they are listed in the participant list.
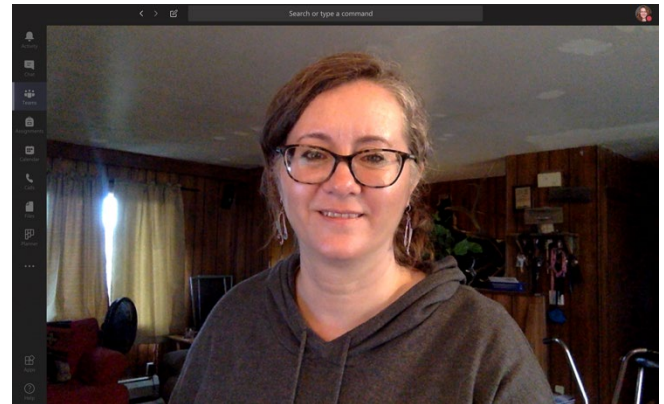
Keep them involved.

To facilitate engagement with your participants it is best to have multiple people facilitate the workshop with clear roles

- Presenter - Providing the material and answering live questions.
- Host – Introduce presenter and monitor questions – hand-raising, unmuting, chat, technical issues.
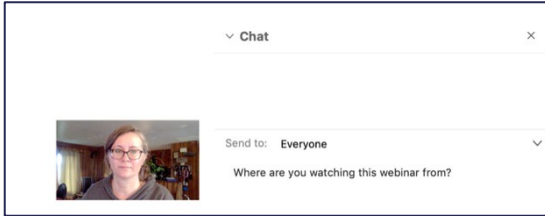
If using the chat tool for questions, you can use an easy "seed" question for everyone to answer in the chat

- Maybe ask where everyone is joining from or something similar.

If you have group discussions, the host/presenter can summarize discussions and ask for feedback

- It may be helpful to have the summary points on a slide so that people can see as well as hear the points.
- The host should call on people to solicit feedback.
- Please give people time to unmute and give them feedback if you can't hear them. If there is a technical issue, go on to the next person and then circle back to that person.
- If you fear "dead air," let someone know ahead of time you will be calling on them to comment or ask a question. Or, your host could be ready with a planted question.

Know your audience: Ask people to have their video on when they are speaking if possible, but acknowledge that participants can turn it off to listen if they have internet bandwidth issues.

- If appropriate, let participants know it is OK to listen in without video if they are parenting/caregiving or have other demands. *Know that this will lead to more distractions and less engagement, though!*

Ask people to mute unless they want to speak. Or, if a small group, consider having people leave their audio open.

- It helps eliminate distractions! Just be prepared to mute them yourself if needed.

If you have breakout sessions, have a moderator in each session. Then bring the groups back to report out the group discussions. Learn more about doing breakout sessions in WebEx.

Use the polling option

- You can do premade or on the fly polls to engage your participants.
- To bring up the poll window in Webex go to "View" and "Manage panels" (1). Select polling and add it to your panels (2).
- Then you will see the polling panel where you can create polls (3). Learn more about how to incorporate polling.
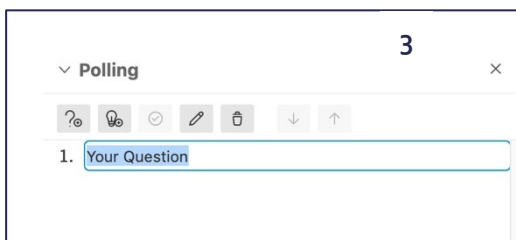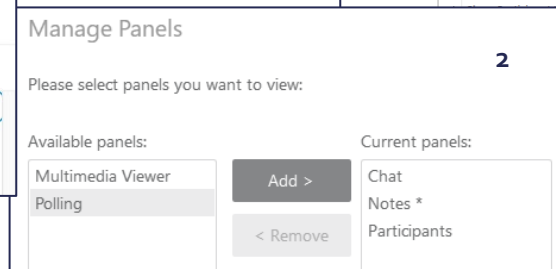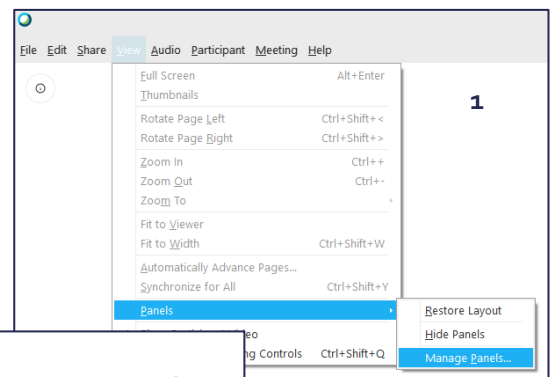
Keep it moving.

It is better to use lots of slides with small amounts of content than static slides that sit there for a long time. You are always trying to compete with the urge to multitask…

- If showing bullets, use a new slide when introducing each one (rather than show all bullets at once and leaving the slide sit there).
- If you show a slide with a lot of content, say, "I'll pause and let you read this," rather than reading it to them aloud.

Record sessions if possible.
- This allows you to move the content along because you can refer to the recording later.
- Provide the link to the participants via email afterwards along with the presentation materials.

A follow-up email provides an easy way for people to respond and ask more questions.
- Let them know if and how you'll ask them to evaluate the presentation.

These are just a few hints to get you started.

Reference for this guide:

The Webinar on Webinars with Andy Goodman

Andy Goodman, co-founder and director of The Goodman Center