

How to Effectively Lead Groups Online

Tips and best practices for facilitating online meetings, trainings and workshops

A. Preparation

Successful virtual group facilitation requires careful preparation. Before any virtual event:

1. Set Up and Practice the Technology

- Practice and get to know the platform well in advance to feel comfortable to address most of the technology issue when they occurs.
- Ask the participants and panelist to test the meeting software [here](#) at any time before the training.
- Schedule a test session for facilitators and panelists 30 minutes before the event
- Test audio and video of each facilitator or panelist
 - All faces should be clearly visible and voices clearly audible
 - No intense light should be coming from behind facilitators
 - Ensure that facilitators or panelists have chosen neutral backgrounds

2. Send Materials and Recommendations in Advance

2 weeks before the event, send information to help participants understand required technology and to introduce the topic, including:

- Background information on the topic (such as videos and links to suggested reading)
- An outline of the participative features used during the virtual event, and how to connect to the online platform.
- Technical recommendations, such as joining from a quiet place with a good internet connection, wearing headphones or a headset during the session, and testing the computer connection
- Alternative options for connection (i.e., by phone)

3. Share Responsibilities

Multitasking may be difficult while leading activities online. Find different people to help with various tasks:

- Facilitation: keeping time, listening, asking questions and introducing each activity

- Technical Assistance: explaining how to use technology, such as screen sharing; recording, sharing links in the chatbox, addressing technology issues
- Monitoring: watching for raised hands, reading the chatbox, answering any direct messages

4. Limit Session Length and Schedule Breaks

Staring at a screen is a heavy mental load, which can make online sessions very tiring. Events should be no more than two hours long (90 minutes for a big group). Schedule a 5-minute break half-way through.

5. Create an Atmosphere of Trust

Adults learn better if they feel they can trust the facilitators and their peers.

- Getting to know participants beforehand will help the facilitator to connect with the group during the session. Take time before the event to survey participants' profiles and experiences, either through information fields in the registration form or at the beginning of the session with a go-around..
- Prepare icebreakers to make the attendees feel more comfortable and to get to know each others.
- Schedule participative group activities, such as breakout rooms for brainstorming or whiteboard sharing for collaborative work.

B. Facilitation

1. Introduce Technology

- At the beginning of the session, remind participants of the technology and features that the group will use.
- Explain the tools carefully and check for understanding.
- Offer people a pre-determined way to ask for help, like using the chat function, raising their hand, by phone, or by email.
- Help participants feel comfortable with the format: acknowledge that it's okay and normal not to master all the technology straight away,

2. Manage Technical Issues with Improvisation

- Most participants understand that many uncontrollable factors can impact online events, like poor internet bandwidth or unexpected disconnection.
- Improvisation is an excellent way to manage sudden technical problems and to keep participants comfortable and engaged when they do occur. While your co-host(s) try to fix the problem, you can tell a story related to the topic, or check in with participants using the chat.

3. Encourage Collaborating on rules

- When training starts, collaboratively create and abide by inclusive rules. For example:
- "Respect other people's opinions, thoughts and experiences"

- “Let’s let everybody speak without interruption”
- “This is a learning environment, let’s feel free to take risks and make mistakes without fear of judgement”

4. Engage Participants in a Variety of Ways

- Keep in mind the physical and mental challenges of being together live online
- Do your best to make the participants proactive to keep them engaged. Use social activities such as practicing skills, collaborating or making decisions, and use social motivation and support.
- Engage the participants directly every 5 to 10 minutes to reduce the feeling of loneliness and fatigue:

“It looks like only about half of the group has shared ideas in the chatbox. If anyone is having trouble with the chat, let us know, or share it out loud.”

“I see many heads down on the web cameras, so I’m going to give you a little more time to journal.”

“Everyone has shared except [name] and [name], who is on the phone. Would you like to share, too?”

“It looks like [name] has stepped away, so we will return to them when they are back.”

- Include a variety of activities to accommodate people with different communication and learning styles, using collaborative whiteboard sharing or breakout rooms:

Group activities:	Self-led activities:
<ul style="list-style-type: none"> • Polls • Chat • Breakout rooms • Spectrums 	<ul style="list-style-type: none"> • Journaling • Drawing on paper • Embodiment activities • Reflection activities

See section C for detailed description of activities.

5. Set People Up for Success.

- Consider not using right/wrong questions as they cannot reflect a deeper level of learning. Rather than asking “Can this principle be applied in this situation?”,

consider asking “Could you explain how this principle can (or cannot) be applied in this situation?”

- Rather than asking, “Who doesn’t understand this?” consider asking, “What can I explain more clearly?”

Honor People’s Emotional State in Times of Crisis

- During a crisis, people often speed up and bring a sense of urgency to every task. You are going to find people in your sessions who are tired, angry, impatient, over-stimulated, fearful or reactive.
- Even if you don’t feel well-equipped to handle strong emotions, you can:
 - Set aside time for people to acknowledge their emotional states during the session
 - Survey anonymously with poll questions, like asking people to report how they are doing on a scale of 1-10; Consider paying particular attention, during or outside the session, to those who express negative emotions
 - Provide frequent breaks to reduce fatigue and stress
 - In a close-knit group, you or your community might have a permanent forum where people can post “Things I have to offer” and “Things I need” to support mutual aid.

6. Be Mindful of Technology-Compounded Discrimination

Marginalized people tend to participate less frequently in group settings. This can be compounded by technology in three ways:

- Prejudice, marginalization and discrimination all decrease people’s confidence, and so does navigating a new online space. The combination of these two factors can further reduce engagement.
- People with fewer resources have a more difficult time accessing technology and finding a dedicated space.
- People in low-income communities may have less reliable internet access.

7. Encourage Inclusive Behavior and language

- Find ways to ensure that minority or marginalized people feel comfortable speaking and engaging openly
- The first participant’s answer is not always the best one, as the fastest responder may not be the one who has considered the question most thoughtfully. A more discreet participant may bring more relevant ideas; elicit responses from multiple participants
- Use gender-neutral words like “humankind” and not “mankind”; “artificial” and not “man-made”; “staffing shortages” and not “manpower shortages.”
- Avoid using gender pronouns when referring to participants. Use passive sentence construction, e.g., “the situation being described” rather than “the situation he is describing”.
- Avoid stereotypes about gender, religion, or other personal characteristics .

C. Tools for Online Session Activities

Many in-person facilitation activities can be done online as well. Here are two examples of activities that can be done in a virtual setting. Prepare a slide for each of these activities before the online event.

Go-around

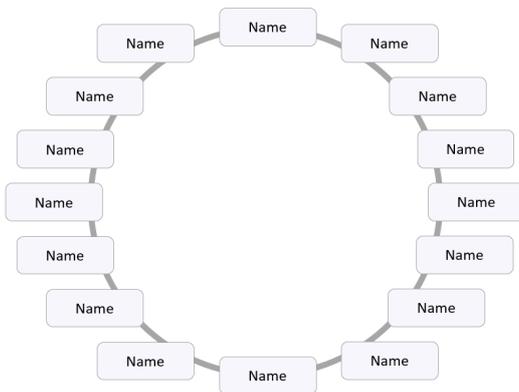
When you want to hear from everyone in a group, the facilitator calls on each person to come off mute and share out loud until everyone has shared. You need some way to keep track of the order, for example, going down the participant list or using a slide on a screen share with everyone around a circle.

TIP: Do not do this with large groups (over 20), or people will tune out. Instead, use chat to get several responses at one time.

Example:

Go-around:

What’s your hypothesis about what’s going to happen when...



Prepare this slide before the online session.

Spectrum

This is one of our favorite activities in in-person facilitation: people line up along a spectrum according to their response to a prompt. You get to see a range of personal reactions quickly. Online, you can do this as a poll, asking participants to rate their responses on a numbered scale.

TIPS: For accessibility, summarize and describe out loud what you see in the chatbox for those on the phone. Repeat as needed what the numbers stand for.

Examples:

