

How to Effectively Lead Groups Online

Tips for facilitating online meetings, trainings and workshops

A. Preparation

1. Send preparatory materials in advance

- In the invitation, include relevant reading, videos and explanations of the virtual platform.
- Provide recommendations for an enhanced experience (e.g., join from a quiet place with a good internet connection, wear headphones or a headset during the session).

2. Delegate meeting coordination responsibilities

- Depending on the complexity of the event, designate one or more additional people to support the main presenter(s) with managing time, monitoring questions in the chat, taking notes.
- Create a plan for managing unexpected technological issues. Be prepared to improvise and rely on each other to troubleshoot if you run into technological problems.

3. Set up and practice

- Test a run-through using relevant platform features in advance (e.g., breakout room and polling features) under similar conditions as the actual session.
- Schedule an audio-visual technology check for facilitators and panelists 15 minutes before the event.

4. Examine what the audience needs in order to feel like they belong and can trust each other

- Review participants' profiles via questions in the registration form or in-session poll to understand them and tailor the session to their priorities and concerns.
- Consider the types of icebreakers and activities (e.g., breakout rooms) they might need to fully engage.

B. Facilitation

1. Introduce technology that may be unfamiliar to the group

- Demonstrate the essential technological features.
- Establish a clear way for people to ask for help (e.g., chat, raise hand feature).

2. Establish clear meeting norms

- Set the expectation that connectivity issues may impact the session.

- Propose some collaboration norms that the group can agree upon or build upon, e.g.:
 - One mic policy – let everyone speak without introduction
 - Use an “Ideas Parking Lot” to capture ideas that may not be central to the discussion
 - “Stay curious; ask questions”

3. Design activities to engage people intellectually, emotionally and socially

- Ask open-ended questions. Avoid binary (yes/no) questions that do not lead to deeper reflection (e.g., “How you can apply this principle in this situation?” instead of “Can this principle be applied in this situation?”)
- Accommodate people with different learning styles by relying on a mix of group activities (e.g., polls, chat discussions, breakout rooms) and self-led activities (e.g., timed reflection on specific prompts).
- Provide breaks every 60-90 mins to reduce fatigue and stress and help people focus.

4. Verify that people do not feel disconnected or excluded

- Check in with people who might appear disengaged; this might be happening because of technological difficulties. Make reasonable accommodations or offer alternatives if possible.
- Practice inclusion by inviting people who might feel like outsiders to share their questions and ideas.

C. Sample Tools for Online Engagement

Many in-person facilitation activities can be adapted to the virtual setting; here are two examples.

Go-around

Hearing from everyone in a group early in a session helps to foster trust.

- For groups larger than 10, offer a check in question in the chat (e.g., “What was your biggest learning today? What is still unclear to you?”) and get several responses quickly.
- For groups smaller than 10, if you have adequate time, ask each person to unmute and share. You can number the participants using the rename feature on Zoom to help you keep track.

Polls

Use the poll feature to help people gauge where they and their peers fall along a spectrum. You can do this as a quick with a polling app (e.g., Zoom, Slido or Menti). Here are some examples:

KNOWLEDGE POLL

How well do you think masks with vents protect from COVID-19?

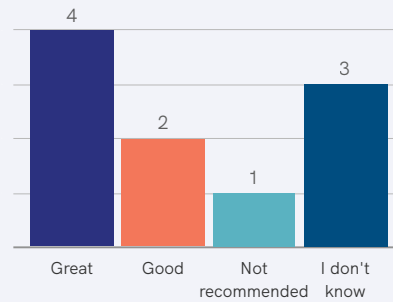
- Great
- Good
- Not recommended
- I don't know

CORRECT ANSWER

Not recommended. Masks without vents are more effective than those with vents.

POLL RESULTS

How well do you think masks with vents protect from COVID-19?



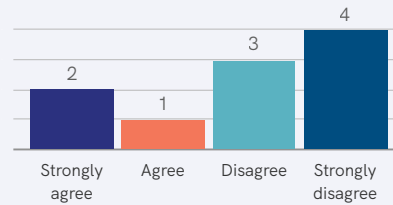
AGREEMENT POLL

What is your level of agreement with this statement?

- Strongly agree
- Agree
- Disagree
- Strongly disagree

POLL RESULTS

What is your level of agreement with this statement?



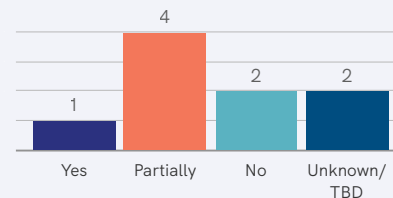
IMPLEMENTATION STATUS POLL

Do you have a specific plan in place for scaling and prioritizing this intervention?

- Yes
- Partially
- No
- Unknown/To be determined

POLL RESULTS

Do you have a specific plan in place for scaling and prioritizing this intervention?



SUPPORT POLL

Which of the following types of support will be most helpful for you in the next six months?

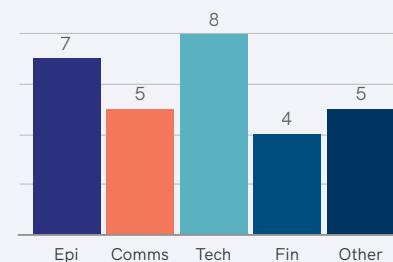
Please select your TOP 2 options.

- Epidemiology guidance
- Communications support and materials
- Technology support including data pipeline volume issues
- Financial support
- Other

POLL RESULTS

Which of the following types of support will be most helpful for you in the next six months?

Please select your TOP 2 options.



TIPS: For accessibility, summarize and describe out loud what you read in the chat box for those dialing in by phone or who may have other visual impairments.