

50 TIPS FOR A VIBRANT VIRTUAL WORKSHOP

Lessons, best practices, and tools
for your next online event



www.fireadaptednetwork.org

FIRE ADAPTED COMMUNITIES LEARNING NETWORK

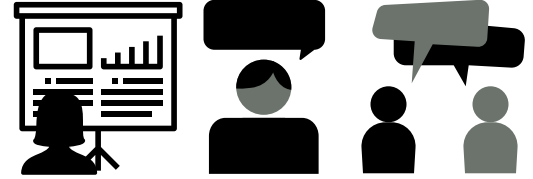
This guide was made possible through support provided by the United States Forest Service, Department of Interior and The Nature Conservancy to the Watershed Center, under the terms of Cooperative Agreement #WRTC_FAC_NET_2018. The content and opinions expressed herein are those of the author(s) and do not necessarily reflect the position or the policy of the USFS, DOI, TNC, or the WRTC and no official endorsement should be inferred. This institution is an equal opportunity provider.



FIRE ADAPTED COMMUNITIES LEARNING NETWORK

The Basics

- 1 Successfully transferring an in-person event to a virtual one requires thoughtful design changes.
- 2 Webcasts, webinars, and workshops are not all the same. They provide different levels of participant engagement and use different strategies. Be clear on your format and clearly communicate it to participants in advance. Expectations for, and of, participants change with the format.
- 3 Don't go it alone. The best workshops have a team of people behind them! Recruit participants, facilitators, staff and administrative support to help you.
- 4 Know your audience... and think about them at each stage of planning.



Is your event designed to deliver information TO people (webcast)? Do you intend to invite responses to information that has been presented (webinar)? Or, is your event about participants sharing ideas AMONG the group (workshop)?

Participant Interaction

- 5 Energy and vibrancy is possible in an online setting! Consider the tone you would like to set and work with your team to embody that energy.
- 6 Dedicate time to orientation and introductions. In fact, you may need even more time for this in a remote setting where people will not have the chance to shake hands or introduce themselves in the hallway.
- 7 Bring participants' voices into the room. This can be accomplished with the chat, in breakouts, or verbally for a small group.
- 8 Consider offering optional time outside the "working" agenda to hang out or play a game as a group. But stay on time—don't use this as a contingency for your working time!—and make sure optional really is optional.

How do I add variety to my virtual event?



Individual, small and large group activities



Analog and screen-based activities



Different methods of engagement (reflection, discussion, presentation)



Breaks, movement and creative moments

Workshop Design

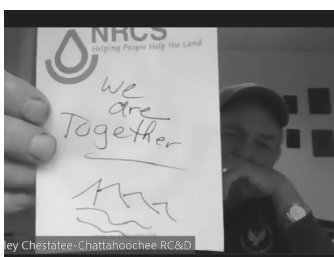
- 9 Have clear objectives. There should be a purpose beyond "we were going to host this in-person." Communicate the objectives to your participants. Your in-person objectives may need to be pared down or adjusted when moving your workshop online.
- 10 Conduct a pre-workshop survey to gauge participants' needs and available technology.
- 11 Variety is the spice of life. People learn differently; make space for a diverse array of activities. Everyone won't love everything, but everyone should love at least one thing.
- 12 BREAKS. Design them. Try to plan for at least 20 minutes in a three-hour session. If you are hosting a multi-day workshop, schedule breaks at the same time each day so people can plan around them.
- 13 Don't over-rely on slides. While slides can be helpful, they can also create a "presentation" feel and inadvertently shift your workshop to be less interactive. Build in "facetime" for the group, intersperse presentations with active engagement, and use your chat tools.
- 14 Solicit feedback. Make space for participants to tell you what is and isn't working so you can adjust for the next day, or the next workshop.
- 15 Build in extra time—for introductions, transitions, and more. People have a tendency to over-stuff agendas. Remember participants won't have the opportunity to connect in the hallways or at the snack table so consider creating space for these informal interactions.
- 16 Have an exit plan. Is this the type of meeting or workshop that can or should end abruptly or do you need to make time for a more formal close-out or gentle exit?

Technology

- 17 You have choices when it comes to virtual conferencing platforms. Some offer options such as remote video shut off, participant mute and breakout rooms. Research your options and make an informed choice.
- 18 Try out the technology you plan to use on multiple devices and operating systems. What does that collaborative whiteboard look like from a phone or tablet? Do you need a specific app for registration? Will it work with firewalls?
- 19 Virtual breakout rooms can make small group discussions and working sessions viable, even for large workshops. But, make sure the person managing the breakout rooms gets a chance to practice before initiating these breakout sessions live in a workshop.
- 20 If you use your phone for audio connection, you may want to reset the time-out option so the screen stays on.
- 21 Update tech before your meeting. Download the latest version of your conferencing platform, run any computer updates, and close programs and internet browser tabs.
- 22 Identify a tech support person for the workshop. Provide their telephone number in emails to participants and share it again at the start of the workshop.
- 23 Build in time to learn the tools. Design an optional 30 minute “tech help” session at the beginning of your workshop to make sure people are comfortable with the platform you are using. If you plan to use technology that is unfamiliar to your participants (virtual whiteboards, for example) make sure you build in time to practice before trying to conduct complicated work using those tools.
- 24 In a sea of available technology, don't forget the low-tech options. Pens, paper, pencils, and movement can (should!) be incorporated to avoid tech burnout.

Communication

- 28 Prioritize what you need people to know. Write and format your emails clearly, but don't assume people have read everything you send them! Spam filters may capture some of your communications. And let's face it, we all get a lot of email. Follow up as needed; send reminders.
- 29 Provide people with contact information for the workshop team. Choose a point person who will be regularly available and checking the chosen channel (e.g. email, phone, text) before and throughout the event.
- 30 In a final reminder message, depending on how tech-savvy your audience is, you may want to recommend that participants run updates on their computers and any other tech “housekeeping” to free memory and bandwidth.



ANALOG ACTIVITY IN ACTION

"I liked how we were able to work in small groups on a powerful topic. I think it represented what an in-person workshop feels like..."

2020 VIRTUAL WORKSHOP PARTICIPANT

Workshop Roles



Meeting Host: Initiate the workshop on the conference platform. Assign breakout rooms as needed. Should not also be a content facilitator.



Tech Support: Help participants navigate tech issues. Participants should have multiple ways to reach tech support (e.g., phone and email).



Chat Box Monitor: Answer or route questions. Provide written activity instructions and include break lines (---) when agenda shifts. Save the chat!



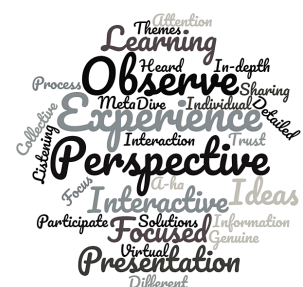
Facilitator: Support activities, foster discussions, and keep time. May be performed by a team of people- just know who is responsible for what and when. If you are presenting, know how to share your screen.



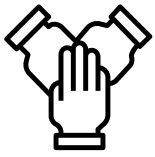
Registrar: Send information about the event. Communicate with participants, track attendance, support logistics as necessary.

Facilitation

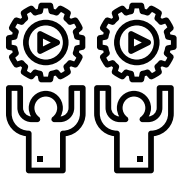
- 25 Create a facilitators' agenda. This is NOT THE SAME as the participant agenda. The facilitators' agenda should include scripted notes, roles, timing, breakout groups, and any other information needed for the event to run smoothly.
- 26 Assign roles (and back-up roles). You will need more people than you might expect to make a virtual workshop run smoothly. Back-up roles are there to save the day when one of the facilitator's internet goes offline.
- 27 Set up a facilitators' communication channel. Consider a group text thread in case the internet goes down for one of your team members. Slack, Skype, or other messaging apps could also be used.



INSIGHTS FROM THE CHAT



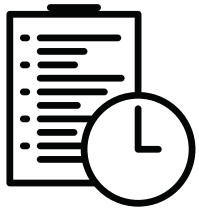
Build a Team



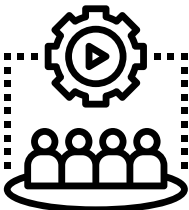
Define Roles



Know Your Audience



Design Your Agenda



Host Your Workshop



Evaluate

Final Preparation

- 31 Final preparation is for everyone! Everyone involved in your workshop design should review your agenda, and know their specific role(s) during the workshop.
- 32 Confirm that all major components of the workshop have a Plan B (and C).
- 33 Build in redundancy. Send agendas, slide decks, and materials that will be shared on-screen to participants before the event to support accessibility and offer a back-up in case of tech trouble.
- 34 PRACTICE!! If you don't routinely use the platform, consider a tech practice run with those in presenter, facilitator and tech support roles (and their back-ups).
- 35 Print out hard copies of all important documents (e.g., lists of breakout groups if you are the tech host). Have any other auxiliary materials (e.g., note paper, art supplies) within reach.
- 36 Take time to rest.

During the Workshop

- 37 Initiate your back-channel text or communication thread. Depending on the complexity of your event and size of your team, you may want to set up several back-channel groups (e.g., facilitators, tech support, and all team members).
- 38 Keep a glass of water and a snack handy. During the break you may need to adjust a process with your facilitation team, provide on-the-spot tech help or set up the next breakout room groups.
- 39 If your platform allows custom naming for participants, make sure everyone's name is correct and not showing up as an organizational account or phone number. You may want to use naming conventions that will help you sort people rapidly into breakout groups (e.g., "participant name, Sacramento CA" or "participant name, fire recovery"). Consider including pronouns, organization or location.
- 40 Orient people to the platform at the beginning of the workshop, even if you have used the platform before. Highlight the mute button and identify the specific features (e.g., chat, reactions) you will be using.
- 41 Run on time! This is especially important for workshop start times, breaks, and ending.
- 42 If things begin to go wrong, let people know (to be human is charming!), and remember your Plan B (or C).
- 43 Collect feedback as you go. It can be harder to read a virtual room. If participants aren't energized and engaged, consider ways to shake it up or move on.
- 44 Make instructions clear and share them in multiple formats (via slide, in the chat box, and orally) to accommodate different learning styles, tech constraints or glitches.
- 45 Use the camera function. Simple gestures like a thumbs up can provide immediate feedback. How's my volume? Thumbs up or thumbs down! It's low-tech, but something almost everyone can do.
- 46 If you will be capturing the chat to refer to or otherwise use later, don't forget to save it at the end of the session. It also helps to insert break lines (====) whenever the conversation switches gears.

After the Workshop

- 47 Send your post-event evaluation. Prepare it in advance to send as soon as possible (while feedback is fresh).
- 48 Send articles, contact information, or other resources that you promised participants.
- 49 Consider sharing abbreviated chat records, or other artifacts that capture participant-generated content. If there are only a few items, they can be attached to the email. If there are numerous (or large) files, upload them and share the link.
- 50 Participate in an after workshop review. Schedule this review well before the workshop so you can meet within a few weeks of the workshop. You want the workshop to still be in your mind AND you want to have enough energy to productively review changes, feedback, and ideas for the next virtual event.