Tips for Online Facilitation

Developed by Sharing Perspectives Foundation Facilitators

Just as activities require some adaptation in order to be brought online, so does facilitation. While offline facilitation experience is certainly an asset, effective online facilitation requires skills and knowledge unique to online contexts. If you are new to online facilitation or have mostly offline experience, these pro tips can help you make the transition with confidence. They include tips for leading activities, preparing for a session, physical presentation, non-verbal participation, and online facilitation in general.

Contents

You can click on any of the links below to jump directly to any of the online facilitation tips in this document.

General Tips

✓ Facilitators who have good typing and comprehension skills can consider typing summaries of what each participant says in the chat. This can be useful if there are audio or language issues, as participants who might otherwise have lost what the speaker was saying can still follow along.

✓ When putting participants in breakout rooms, consider the dynamics and diversity ahead of time. If they are meant to be learning from each other's differences, make sure there is a good mix of identities or backgrounds in each room. Keep in mind which participants are extra talkative or quiet, so that you can create groups with balanced participation. If someone struggles with expressing themselves in the language of the session, try to place another speaker of that language in the room to help them translate. Audio quality, connection issues, and power dynamics also should be taken into consideration.

✓ If you have a quiet or disengaged group, assign different roles to participants. You can assign someone to be an assistant who types summaries in the chat, a timekeeper, an entertainer who calls for time-outs and energizers when the group is tired or disengaged, etc. You can come up with as many other creative roles with your group as you want.

✓ Interchange between small groups and full group discussions, as they both have their benefits and can boost group energy levels by 'switching things up.' Small groups can make participants feel more comfortable sharing, give more opportunities for quieter participants to contribute, and help participants form connections. Full group discussions add more perspectives, allow for facilitator observations, enhance group dynamics, and build the sense of ownership.

✓ When selecting the digital tools you will use to conduct an activity, there are a few questions you should ask yourself: Is this site/app available in my target country and target language? Will the internet speeds of my participants be fast enough to use it efficiently? What devices will my participants be using? If some need to be on mobile phones, does it have a mobile phone version? If I have participants with video or audio issues, will that prevent them from participating? How could I include them?

Before Your Session

✓ Have your detailed session plan with activities, possible questions and the time frame for each part ready before the session. Having a structured session plan with a generous time allocation for each activity will help you manage time efficiently, and give you a margin of flexibility to lengthen an activity if participants show more interest or need more time to express their thoughts on a topic.

✓ Aim to be in the meeting room at least 10-15 minutes before it starts, and encourage your participants to arrive early. This will help you check everyone's tech and hopefully get tech issues fixed by the start time. It can also give you some time to spark small talk amongst your group, in order to help everyone get to know each other better and solidify group bonds.

✓ Charge your device ahead of time and make sure it's plugged into a power source.

✓ Familiarise yourself with all requirements and documents of the OCEA you are facilitating. This will assist you in answering participants' inquiries and referring them to the correct place or person to support them.

✓ Polls in Zoom and many other video conferencing platforms can be loaded ahead of time, so that you can share them in your meeting with just a click instead of creating them while your participants wait.

✓ Have an action plan for different scenarios you expect you might encounter, such as a large portion of your participants having audio issues, or you losing your connection for more than a minute. An example of an action plan could be that you tell participants at the start of the session that if you lose your connection you would like one of them to be the interim facilitator and move the discussion along until you get back. Ask them who would like to be the 'backup' facilitator for that day.

✓ Invite participants ahead of time to share anything with you that they might want you to be aware of. This can help you plan appropriate activities. For example if someone tells you they are dyslexic, you can avoid reading-based activities.

Setting Up Your Screen

Facilitation often involves a level of multitasking. In online facilitation, this usually means needing to have multiple windows and tabs open at a time. Setting up your screen properly can save you time and mental space while in sessions.

✓ Use only one monitor. Looking away from your webcam to a different monitor while someone is talking can be received negatively, and can lead to some bad participant habits. Make sure all the windows you're looking at are on the screen facing your webcam.

✓ Place the video conference window front and center. When we're in person we show that we are listening or speaking to someone by looking at them directly, and we would avoid looking away from them to the bottom right or looking down at them. Avoid these mistakes by placing your laptop high enough that you can look straight ahead into the camera rather than looking down, and place the video conference window just below the webcam in the upper center.

✓ If there are few enough people in the session that you can make that window smaller without sacrificing video size, do so until you have a space directly below it on your screen. Here you can place a window with an agenda or anything else you will have to look at frequently. If that isn't possible, try to put this window as close to the center as possible so that you aren't looking too far away from the participants.

✓ If you are co-facilitating or have a tech person and need to have an extra chat visible at all times, make that window small and put it in a corner of your screen.

✓ Have each tab or document that you want to screenshare in its own window, and minimise them until you need to use them so they don't clutter up your screen. Close all unnecessary windows and apps.

Note: *if you wear glasses remember that participants might be able to see all your windows in the reflection!*

Physical Presentation

✓ Make sure that your face is well-lit and fully visible. Facial expressions are an important facilitation tool, and your participants should be able to see yours as much as possible. Make sure there is no light or window directly behind you, and raise your computer high enough to look straight ahead into the camera.

✓ Speak clearly and at a slightly slower pace than usual.

✓ The American Psychiatric Association advises online speakers to project their voice and gestures approximately 15% greater than they would in-person.[1]

✓ Make sure that participants are able to see your hand gestures as well as your face. You might have to pull your arms or hands in slightly.

Note: Be aware of your body language, as it will affect the participants' confidence in sharing openly. For example, yawning in front of the screen might indicate a lack of interest or a boring discussion, thus negatively affecting the group and their conversation. If you are feeling tired, it is advisable to grab a coffee or get some fresh air before you start the session.

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[1] The American Psychiatric Association. (2021). Learning To Do Telemental Health.
https://www.psychiatry.org/psychiatrists/practice/telepsychiatry/toolkit/learning-telemental-health

Activities

✓ Start your OCEA by encouraging your participants to establish ground rules or guidelines for their interactions. Examples could be 'we will listen actively,' or 'we will turn on our videos.' Encourage them to get creative, and envision what they want their conversations to look like.

✓ Use reflection activities often to be able to identify points to improve and integrate into your upcoming session planning.

✓ Interchange between fun activities, short activities, long activities, heavy content activities, etc. Sticking to one type of activity can lead to stagnation.

✓ Always close an activity with a debrief. Debrief conversations are where the learning and reflection usually take place, and where participants come to understand the goal or 'point' of the activity.

✓ See our Online Dialogue Activity Bank for ideas and best practices regarding virtual activities that are useful for online community engagement.

Non-verbal Participation

The importance of spoken words in communication is widely understood, but facilitators also understand that body language and facial expressions are often equally important and informative. This has been the topic of some concern to facilitators moving from offline to online facilitation, as these are not always discernible through the screen. There are tools online facilitators can use to compensate for this loss, however, and one of the principal ones is hand signals. These may not seem at first to be very impactful, but a 2021 study of the use of hand signals in online meetings by University College London (UCL) researchers found that groups in which hand signals were used gave significantly higher ratings for personal experience, social bond formation, group dynamics, and final outcomes. They can also save a tremendous amount of time. A sample activity that uses hand signals can be found below. Many video conferencing platforms have hand signal emojis, but these are often limited to thumbs up and a raised hand, and not all participants might be aware of how to find these. It is therefore suggested that you start with a selection of hand signals agreed upon by your group that they demonstrate through their cameras (which is also a great way of getting participants to turn on their cameras, if this has been an issue!)

Sample Hand Signal Activity

If you are facilitating a dialogue in which you would like to cultivate empathy and connection between participants, you can teach your participants hand signals that they can use when others are speaking. You can tell them: "When one of your fellow participants is talking and you hear something that you have experienced also, you can show us by putting your hands on your head. If you can relate to an emotion or thought that someone expresses, you can put your hand on your heart. For example, if someone has been stereotyped because of their identity and you have also had to deal with being stereotyped, you would put your hands on your head. If that person said it hurts to be judged, and you have also felt hurt by others' judgement, you would put your hand on your heart." You can also provide them with a means of expressing support for each other by telling participants that they can use a hand signal (for example putting their hands in the shape of a heart) to express empathy and care for the person speaking. This allows participants to see and feel in real time that they are not alone in their feelings or experiences, to feel encouraged, and to establish lines of connection and similarity between each other. This can be a great way to provoke more storytelling and group ownership, by inviting them to follow-up with one another about their stories. You can say: "Does someone who puts their hands on their head want to share their similar experience? Does someone who puts their hand over their heart want to say what they relate to?" Encourage them to engage with each other directly, to ask questions and share responses to each person's story. This can go a long way towards building a group that has care and understanding, and drives their own dialogue forward.

Common Hand Signals

➔ **Thumbs up** = yes/good
➔ **Thumbs down** = no/not good (Note: some facilitation resources will list this as an option for saying 'I disagree' when someone is speaking. This hand signal should be used carefully and strategically, as it can cause harm to the dialogue when there aren't strong social bonds within the group. Having someone give a thumbs down while they speak can lower the confidence of speakers, and make them change or take back what they said).
➔ **Thumb to the side** = maybe/so-so/I'm not sure. (You are also not limited to three thumb positions. You can invite participants to place their thumbs anywhere on a 180 degree axis to express degrees of agreement or disagreement in activities).
➔ **Raising one hand** = I would like to speak next
➔ **Hands on your head** = I have experienced that too/I can relate to that experience
➔ **Hand over your heart** = I have felt that way too, or I have also had that thought/I can relate to that emotion or thought
➔ **Hands in the shape of a hear**t = expresses empathy, care and support for the person speaking
➔ **Clapping motion**s or lifting hands in the air and twisting them back and forth (applause in sign language) = cheering/congratulations

The list of hand signals used by the UCL researchers can be found [here](). Ones that are particularly useful for dialogue are:

➔ **Two fists on top of each other** = I would like to build on that
➔ **Fingertips of one hand perched on your head from above** = I don't understand/I need clarification
➔ **Cupping a hand behind your ear** = you are too quiet/on mute (this could also be a useful hand signal for 'I'm having a hard time hearing/understanding what speakers are saying').

Other hand signals that have been widely used by organisers and are useful for dialogue are:

➔ **Putting your index finger and thumb in the shape of an L** = Language issue/I need translation/you used a word I don't understand
➔ **Making the letter 'P' with your fingers** = point of process/I'd like to make a request or suggestion about the facilitation of this session

Note: These letters might not make sense in your group's spoken language, and some hand signals might be considered offensive in different cultures. For example, in the United States if the hand making the letter L sign is lifted to your forehead it can stand for 'loser.' Likewise, the OK sign can be a sign of failure in middle and southern Europe, or have sexual connotations in Brazil, Turkey and Venezuela. Similarly, the widely known thumbs up signal, used to express agreement or liking something, can actually be insulting in Bangladesh, Greece, Iran, Russia, Sardinia and parts of West Africa. You should therefore do your research beforehand, and give your group an opportunity to change the hand signals if they desire.

Polling and Non-verbal Responses

Many facilitators are accustomed to using in-person, non-verbal methods of gauging participants' stances on a topic, for example by setting two points in a room (often labelled 'agree' and 'disagree') and asking them to physically show their position on the issue by placing themselves somewhere on a spectrum between the two points. Fortunately, it is easy to bring these methods online. Here are a few strategies:

✓   Set up a simple poll that allows them to select answers on a scale of agreement between 100% agree and 100% disagree. Anonymous polls are a great way to get honest answers on sensitive topics, if you think group trust isn't high enough for some participants to share their thoughts openly. When asking them about their opinions you can then say "does anyone who put '100% agree' feel comfortable telling us about their perspective?" Note: if using the polling function in your video conference platform, make sure you can load polls into your meeting room ahead of time so that you don't waste session time making them.

✓   If you would like more customisable or live polls, you can find some in the Resource Hub. Make sure that all your participants meet the digital requirements to participate beforehand.

✓   If you prefer a 'low tech' technique that incorporates more physical movement you can ask participants to use hand signals. For example, you could read a statement to the participants that you would like them to react to, and then invite them to position their thumbs somewhere between up (100% agree) and down (100% disagree) to communicate their response. If small or grainy videos make it difficult to see their thumbs, you can ask them to position their arms instead. You could also tell them to pick a number between 1 and 10, where holding up 1 finger means 100% disagree and holding up all 10 fingers is 100% agree. They can then show their stance by holding their hands up to the camera. Feel free to get creative, and determine what works best for the tech situation of your audience and what is most likely to get them engaged.

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