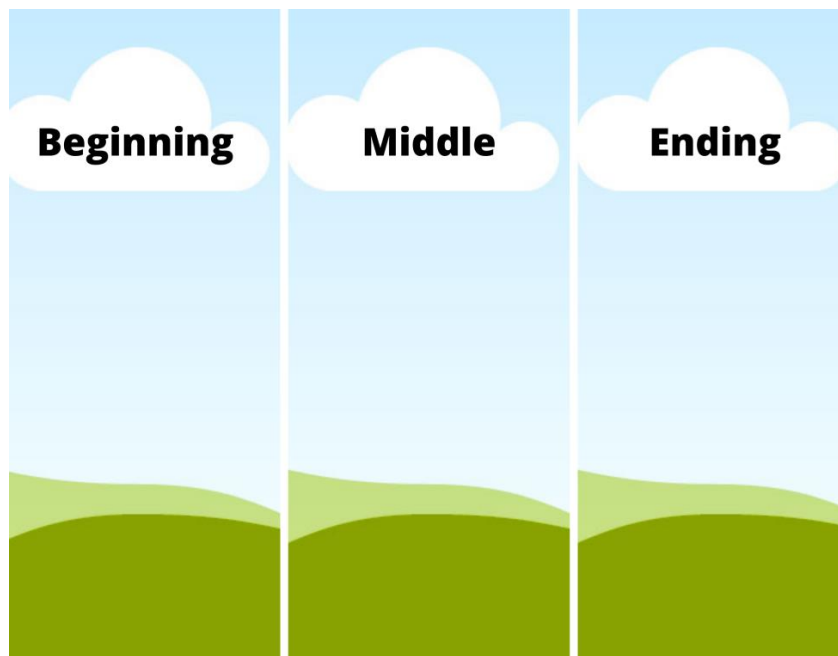




## Transitioning to Virtual Training

### Tips and Good Practices for transitioning in-person training sessions to the virtual learning environment

Version 1



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July 2020

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# Introduction

The trend of offering an increasing number of virtual programs has been rapidly accelerated by the COVID-19 pandemic. Since March 2020, organizations all over the world have been forced to decide whether to cancel their in-person programs or to transition them to virtual sessions. Those organizations with a mission focused on capacity building and technical assistance have had limited choices - in a world of constantly changing and evolving needs and responses, they have to be able to provide virtual offerings that bring critical new information to their audiences.

The reality is that everyone has needed to become a specialist in designing and hosting virtual learning sessions almost overnight. Many people have done their best, drawing on their own experiences with organizing or attending webinars. This is a limited foundation for the transition of in-person programs to the virtual learning environment for a number of reasons:

- In-person programs are typically longer in duration than is recommended for virtual sessions;
- In-person programs can accommodate a wider range of interactive elements, including table discussions and small group work;
- In-person programs more easily provide the instructors with feedback from participants, allowing them to adjust the planned program to clarify misunderstandings or to introduce more advanced concepts;
- In-person programs can more easily allow participants to practice a new skill and get instructor feedback.

All this means that the transition from in-person program to virtual session requires more attention than simply preparing a 1:1 alternative (i.e. matching the same planned time, presentation and activities that had been planned for the in-person session). In fact, the process of transitioning to the virtual learning environment is an opportunity to step back and consider the optimal approach to meeting the learning objectives in a new and different environment.

## Core Concept: Unit of Work

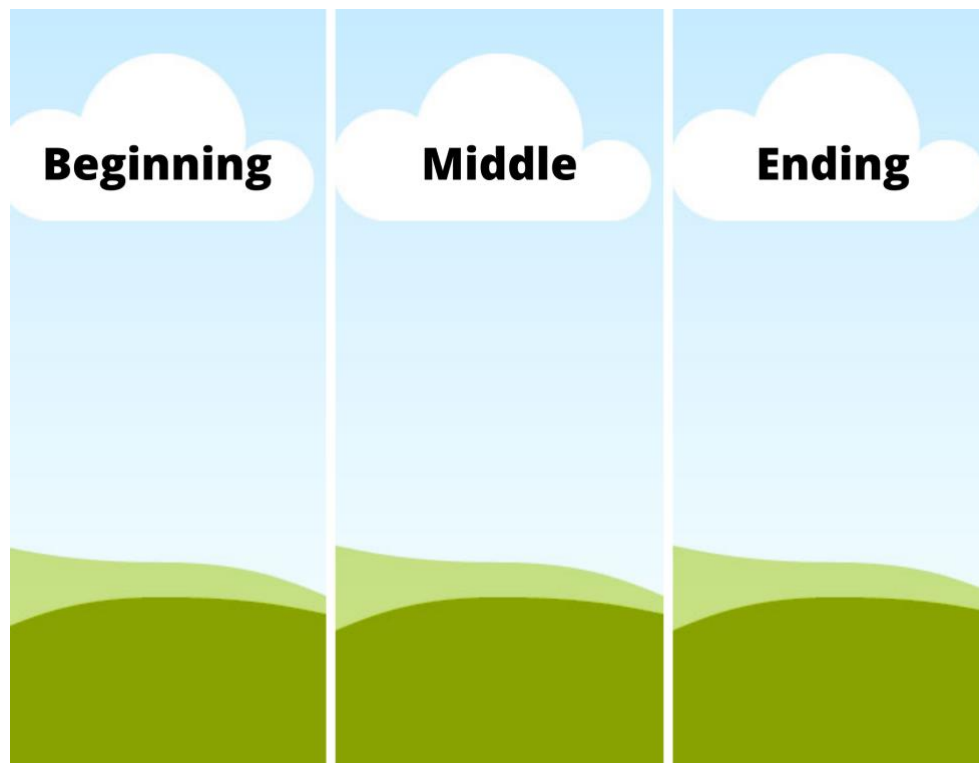
A useful way to think about the process of preparing for and running a virtual learning program is as a Unit of Work. This is a concept from Gestalt psychology, an approach that looks at whole systems, and it invites us to consider each task we take on, each project, each initiative, as a Unit of Work with a Beginning, a Middle, and an Ending.

The three phases of the Unit of Work represent the whole cycle of work, from its initiation to its conclusion:

- **Beginning** - the birth of new work, building the team that will do the work, carrying out the initial research to conceive the concept, the preparations and development to launch the work.

*In a learning program, this is the phase of designing the program - setting the learning objectives, selecting the activities, preparing materials and content.*

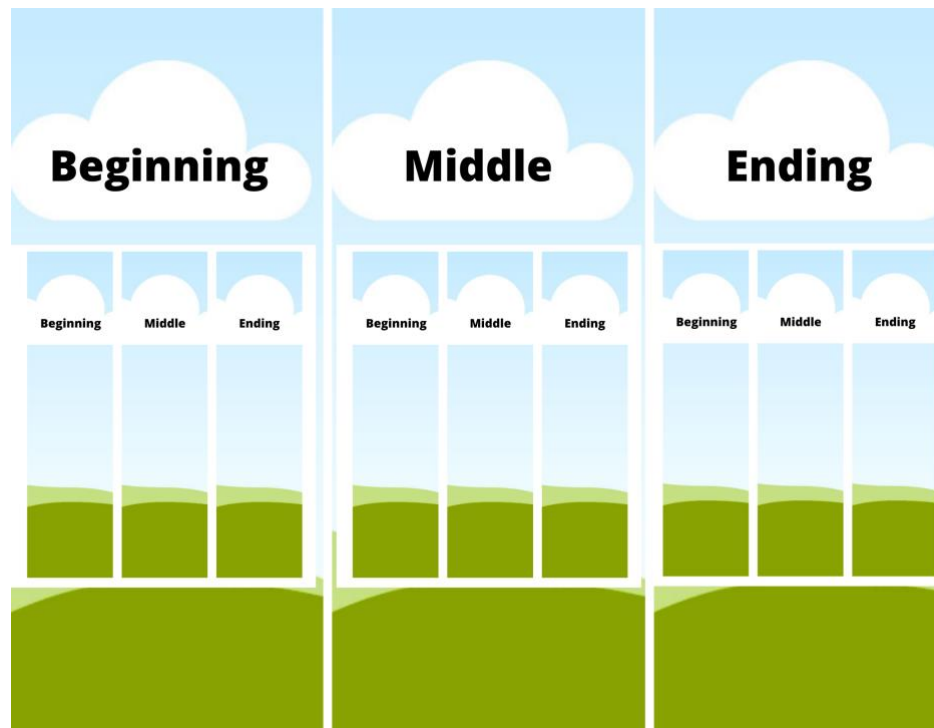
- **Middle** - the most active phase, when the work is being implemented by the team.  
*This is the period when the program is being delivered - the live session is underway, and participants are being engaged in the learning process.*
- **Ending** - as the work winds down, draws to a close, the team wraps up its activities. It reviews the experience and hands over lessons and assets to others in the organization, to be carried into new Units of Work.  
*For the learning program, this is when the evaluation takes place. Feedback is provided to faculty. The learning design and materials are archived for use in later programs. And the learning team reflects on the experience, drawing lessons to improve the quality of other learning programs.*



A finished Unit of Work can be seen as a coherent and understandable experience, project, initiative. There is no regret about unfinished business, and there has been satisfactory attention to each of the three phases.

It is possible for a Unit of Work to be interrupted, even to be closed early. This can lead to a lack of closure for team members and participants. While they move on to other work, they may continue to wonder about what they might have accomplished had they been able to complete the work.

It is helpful to understand, in the context of a learning program, that each of the three phases of the Unit of Work contain within themselves their own three phase cycle of a Beginning, Middle and Ending.



Being aware of these phases reminds us to give appropriate attention to each step.

As an example, in the Middle phase of many learning programs (when live events are being delivered), it is not unusual for the Beginning to be neglected, with both learning designers and faculty impatient to get to the 'content-rich' Middle phase. This can mean that participants are not adequately warmed up to the group and to the learning, they do not get opportunities to consider what is going on in their work environment that will make them receptive to the new content they are about to receive. It can also mean that they don't feel sufficiently safe and welcomed in the learning space, and may be less likely to participate, to share their questions, and to be vulnerable in acknowledging their need to gain from the learning experience. This is the value of introductory activities and "icebreakers" - they serve to warm people up, to prepare them for the learning experience, and to transition them into being receptive and engaged participants.

Likewise, it is common to overlook the importance of the Ending process during the Middle phase. This is the phase during which consolidation of the learning takes place, when people turn naturally from the new content to consider how this applies to their situation, how they can bring any lessons back to their workplace. Too often, the Ending is squeezed into the final moments of a program, with cursory attention to the need for reflection and application. The final moments of many learning programs are crowded with information on upcoming programs as well as admonishments to "remember to complete the Evaluation!" The result is that participants are not given the opportunity to complete the full unit of work for themselves. While they may recall interesting content or entertaining presentations, they don't get the opportunity to integrate what they have seen and heard into applicable lessons to carry into their next unit of work - that of returning to the workplace.

## Structure of this Toolkit

This toolkit is the first version of a longer planned document that will describe how to work as a learning team across all three phases of the virtual learning program.

This version assembles tips and good practices to guide you as you transition in-person programs to meet the needs of the virtual learning environment, with a particular focus on the Beginning phase – the aspect of preparing for and designing the new virtual learning program.

Once complete, the toolkit will have three main sections, modelled on the three phases of the Unit of Work:

- **Beginning:** this introduces core concepts in focusing the learning session to ensure it meets the needs of participants. It also introduces a range of elements (both synchronous and asynchronous) that can be chosen during the learning design stage to create the structure and process for the virtual learning session.
- **Middle:** this section identifies good practices for the hosting team and the faculty/instructors as they prepare for and lead synchronous virtual learning sessions
- **Ending:** the final section provides a number of ideas for following-up with participants after a learning session has concluded, and for supporting continuous improvement on the part of the hosting team and the faculty/instructors.

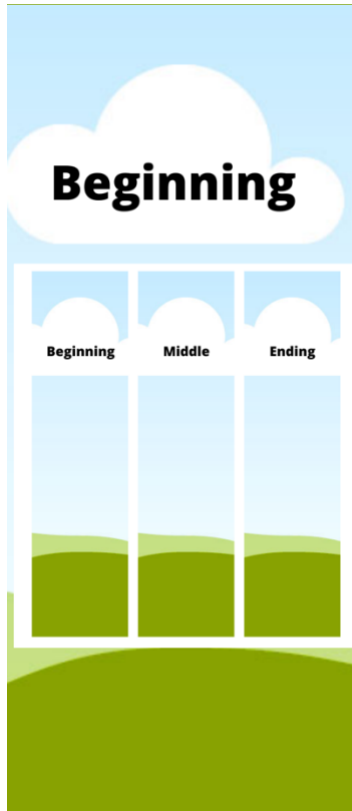
The field and practice of virtual learning is undergoing rapid innovation at the moment. A number of new technology platforms have emerged in recent years and creative learning designers are exploring new ways of using them to expand learning engagement and impact.

And participants are becoming increasingly sophisticated and discerning in their experience and expectations. They are less willing to be “talked at” (the unfortunate reality of too many webinars) and are looking to become more actively involved and taking responsibility for their own learning outcomes. They want to participate in learning activities that respect their experience, their learning needs and how they will apply what they learn.

This Toolkit is designed to help you, as a designer of learning experiences, to develop well-designed, engaging and impactful virtual learning sessions. Be creative, and have fun in this work!

# Beginning

The aim of this first section is to remind us that we have a responsibility to design the virtual learning sessions for real people, facing real challenges, who are trying to navigate how to work in a world significantly impacted by COVID-19. This means we are obliged to make our best effort to prepare a learning experience that will bring value, will be a good use of their limited time, and will help equip them for the work they are doing now.

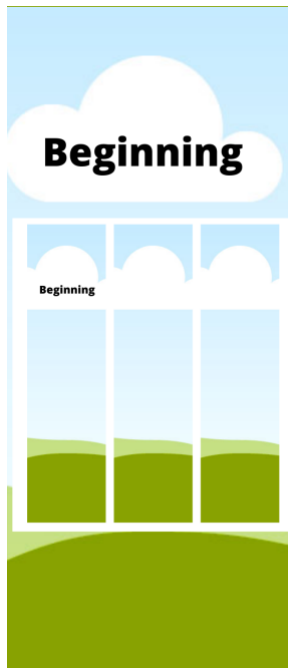


There are three phases in this section:

- Beginning - Getting Clear on WHY, WHO and WHAT
- Middle - Developing the Design - HOW
- Ending - Consolidating the Design and Materials - WHERE



## A. Beginning - Beginning



Your work as a learning designer begins in the Beginning of the Beginning... the first phase of taking account of what is the work to be done.

The activities in this first section will help you gain important clarity on why this learning program is needed, who it will serve, and what it aims to achieve. This is an essential foundation before you can begin structuring the learning activities.

### A.1 Purpose - WHY?

A good starting point in the journey of preparing a virtual learning session is to clarify the intent of the program. Why are you hosting this session? If you don't have a clear response to this question, it will be challenging to design and host a compelling and impactful learning experience.

There may be a number of reasons for hosting the session - though "we've always had a session on this topic" shouldn't be one of them! Who needs the information you will be providing? Whose work can be meaningfully and positively impacted as a result of what they learn in the session? Arriving at clarity on the WHY for the session is necessary before you can turn to the audience (WHO) and the learning objectives (WHAT).

Two reasons to consider as part of your purpose are that there is a compelling Business Need for what you plan to provide, and that there is a known Performance Gap that is preventing people from working at their best.

- **Business Need** - the organization needs to be able to respond to new and changing conditions, and the program can bring information and materials to support this.
- **Performance Gap** - individuals need to develop knowledge and skills to improve their job performance. This may be due to deficits in their earlier training and experience, or it may be as a result of changing conditions for which they have not been prepared.

Getting clear on the rationale for your program will also help you clarify another important question - is the program intended to help individuals do their own jobs better, or are you equipping people to introduce tools and processes to others in their organization? Your response to this question may guide how you develop the program.

## A.2 Audience Profile - WHO?

With a clear purpose and sense of what kinds of changes you will be supporting through this virtual program, we can now consider the audience. Developing a profile of the participants in your program is helpful to ensure that the right people know about and participate in the program. It also informs the Learning Objectives (WHAT) and the design (HOW) of the program.

Some questions to consider include:

- What roles do the participants play in their organization?
- What is their current experience with this topic?
- Are they responsible for just their own work, or do they lead others?
- Will they be responsible to apply what they learn, or will they oversee other people who will carry out the work?
- What support will be most helpful for them to tackle Business Needs?
- What will be helpful for them in improving their Performance in this area?

Many learning programs will intentionally cast a wide net over who will be included in the target audience, including people with many different roles and with varying levels of experience. There is nothing wrong in doing this, as long as it aligns with the Purpose (WHY) of the program. You also need to account for a more generalized audience which may lead to more generalized Learning Objectives (WHAT) and less concrete application on the part of participants.

## The Learning Team

It is helpful to understand the different roles that are needed in the Learning Team for virtual learning programs. There are some important differences from what may be needed for an in-person Learning Team.

While the precise composition of the team may vary, depending on the duration and complexity of the virtual program, the following roles are typically part of the Learning Team:

- **Program Manager** - Oversees all aspects of the learning program. Manages relationship with executive sponsors and sees to the ongoing development of the program from its initiation to the conclusion.
- **Instructional Designer** - Guides the team through the development of the learning program. Advises on the Learning Objectives. Provides expert advice on how the learning elements can be selected and combined in order to meet the purpose of the program. Coaches the Faculty on developing content, to ensure this meets good practice guidelines for effective virtual learning.
- **Host** - Serves as the Host or Moderator of live events. They typically open and close the session and serve as the bridge between different parts of the program (especially if different faculty are involved). They help manage time and process and can support the faculty in staying on time.
- **Faculty (including Trainers and Presenters)** - Serve as program faculty for live virtual sessions. Trainers and Presenters are typically experts in the topics they address and are skilled in presenting new knowledge and information to participants, and in running learning activities.
- **Tech Host/Producer** - Maintain websites and other web-based resources and platforms. Produces and runs live, synchronous sessions so that Faculty can focus on the learning activities. Support participants with technology challenges.
- **Engagement Host** - Designs and hosts the interactive elements of the live program. Familiar with using all the interactive tools of the virtual learning platform (polling, chats, breakout rooms, etc.) that promote attention, engagement and interaction.

While some people can play multiple roles in the learning team (for example, the Program Manager might also serve as the Instructional Designer and the Host), a group of people will typically be needed to produce a live virtual learning session. It is rare for the roles of Host, Faculty, Tech Host and Engagement Host to be held by just one or two people. A team of three or more is more common and is encouraged as a good practice.

## A.3 Learning Objectives - WHAT?

Developing the Learning Objectives is a key step in the design process, as they establish the standards that will serve to anchor the learning experience. The Learning Design (HOW) is centered around developing just the right learning process to achieve these Learning Objectives. Adding elements that don't support the Learning Objectives can be distracting for participants, leaving them wondering about the purpose of seemingly superfluous learning elements.

There are a number of different ways of developing Learning Objectives. One useful way is to look at this through a capacity building and technical assistance lens:

<b>Raising Awareness (RA)</b>	By the end of this program: <ul style="list-style-type: none"><li>• What will participants <b>KNOW</b>?</li><li>• What will participants <b>UNDERSTAND</b> and <b>APPRECIATE</b>?</li></ul>
<b>Enhancing Skills (ES)</b>	By the end of this program: <ul style="list-style-type: none"><li>• What will participants be <b>ABLE</b> to do?</li></ul>

It is important to be realistic about some of the limitations of shorter virtual learning programs. They are good channels for Raising Awareness but can be more limited in their value for Enhancing Skills (unless they are carefully designed, with sufficient time being given to introduce, practice and get feedback on new skills).

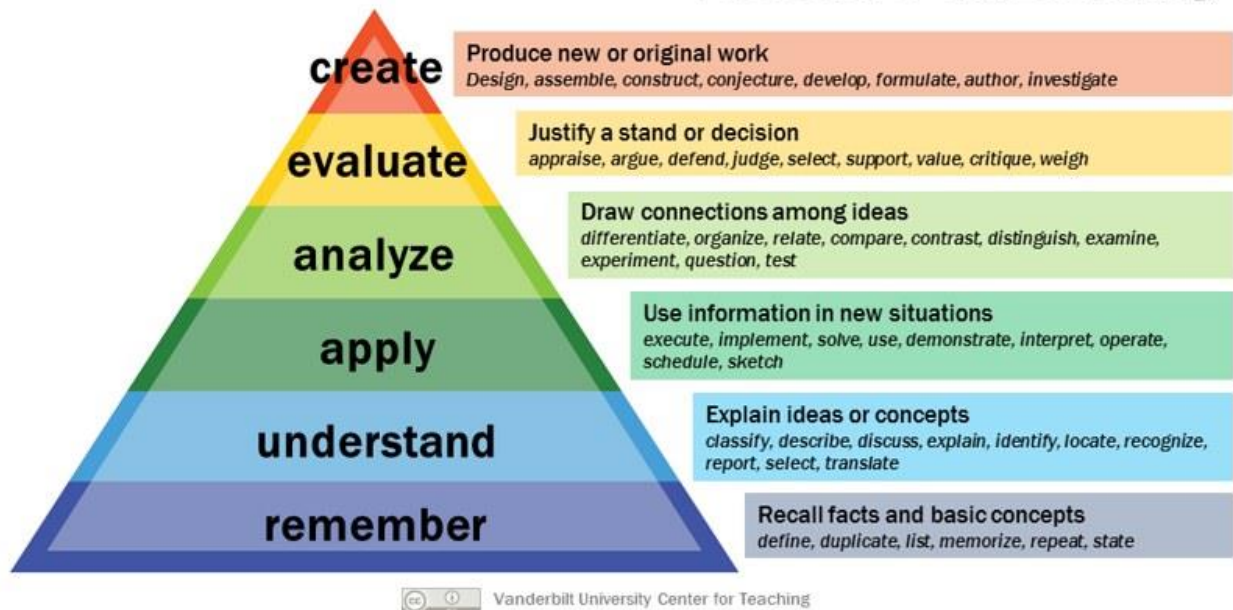
**Bloom's Taxonomy<sup>1</sup> for Learning Objectives** (first developed in 1956 and revised by a team of cognitive psychologists and instructional specialists in 2001) is a useful tool to draw on in preparing the objectives for the virtual learning program. Learning Objectives have the benefit of helping you plan appropriate instruction and to ensure that the delivery of the program is aligned with the objectives.

<b>Remember</b>	Recall or recognize information <i>Arrange, define, describe, label, list, memorize, recognize, relate, reproduce, select, state</i>	RA, ES
<b>Understand</b>	Understand meaning, interpret, extrapolate <i>Explain, reiterate, reword, critique, classify, summarize, illustrate, translate, review report, discuss, re-write, estimate, interpret, theorize, paraphrase, reference, example</i>	RA, ES
<b>Apply, Analyze</b>	Use of apply knowledge, put theory into practice, use knowledge in response to real circumstances <i>Use, apply, discover, manage, execute, solve, produce, implement, construct, change, prepare, conduct, perform,</i>	RA, ES

<sup>1</sup> For more information, see [this link](#)

	<i>react, respond, analyze, break-down, compare, quantify, measure, examine, relate, experiment</i>	
<b>Evaluate</b>	Assess the effectiveness of whole concepts in relation to values, etc.; judgement in relation to external criteria	Not Applicable to RA and ES
<b>Create</b>	Develop new unique structures, systems, models, approaches, etc.	Not Applicable to RA and ES

## Bloom's Taxonomy



## A Design Interlude...

Now that you can clearly articulate the Purpose for your virtual learning Program (WHY), have gathered some information on the profile of the audience (WHO), and have developed the Learning Objectives (WHAT) that address the Business Need or Performance Gap, you are almost ready to begin assembling the components of the program...

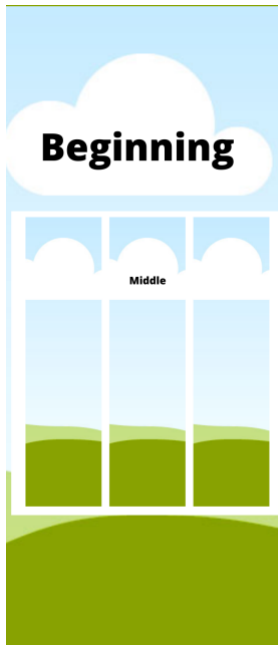
But not quite!

In an ideal world with few constraints, the information you have assembled above would lead you to develop a learning process first, and then you identify how much time will be needed to satisfy the learning objectives.

In the reality with which we all deal as learning professionals, we have to modify our approach to take account of some real constraints that will limit what we will be able to include in our design. Amongst these, the following are real and practical constraints that will limit our design choices:

- **Duration** - the time available for the program may be limited because the session will be part of a larger event, and we are unable to determine or influence the duration.
- **Audience Size** - while a smaller audience allows for greater intimacy and more interaction, there may be practical reasons and organizational imperatives for hosting larger groups. This impacts on our design choices.
- **Delivery Platform** - different virtual learning platforms have different features and capabilities. Not all platforms will smoothly support the design selections we might like to make, and we may have to adjust our design to fit with the capabilities of the platform.

## B. Beginning - Middle



At last you have arrived at the Middle part of this Beginning phase!

During this phase, you will start to assemble the components of your learning program. With clear answers to the Why, Who and What questions, you can make thoughtful, well informed decisions on what learning elements will best support your participants and result in the desired impact on the business needs and performance gaps.

### B.1 Learning Design - HOW?

While there are many good reasons for designing learning programs that run over multiple sessions, this guide will focus on preparing for a single session learning event.

### Core Learning Model - the Unit of Work!

The Unit of Work also provides us with a useful concept for the overall design of the learning experience for participants:

- **Beginning** - How will the program be promoted? What form of invitation will participants receive inviting them to join this experience? What communications will they receive before formal events take place? Will there be pre-work to help them be ready for the program? Will they be able to interact with other participants and the learning team, including faculty, before the formal event?
- **Middle** - How will the formal event be launched? What will be needed to create an inviting and safe place to support learning? In what ways will information be provided to participants? How will they be engaged during the event? Will there be opportunities for breakout and small group activities? And how will the session come to a close?



- **Ending** - What communication and engagement with participants will take place after the event is over? Will there be follow-up activities that support participants as they seek to apply what they have learnt?

Many learning programs focus almost exclusively on the Middle phase - what will happen when participants come together to hear from expert faculty. By using the concept of the Unit of Work, we are reminded that there is equally important work that happens before and after the event. Working in a virtual environment, it can be a lot easier to incorporate thoughtful Beginning and Ending activities into the learning program. They often can be done for very little extra cost, apart from the time needed from the learning team to support these activities.

## B.2 Designing for the Beginning - Pre-Session Work

This part of the learning design process is focused on what will be needed to support participants in their preparation for the virtual learning program. There are a variety of activities that can be conducted, depending on the objectives of the learning program. The duration of the program is also influential on this phase - typically, the longer a program, the more it is worthwhile to invest in pre-session activities.

### Surveys

The purpose of a survey as part of pre-session work is to allow the learning team to collect information specific to the registered participants. This provides them with information about participant experience (both in general with their careers and specifically in relation to the topic of the learning program), their expectations, and particular challenges they may be facing.

This information can be used to tweak aspects of the learning program. Summaries of this information can also be shared with participants.

### Community Platform

A community platform provides a web-based space dedicated to the learning program. It collects in one place a variety of information and materials that are supportive to the participant experience.

While community platforms can typically be customized in multiple ways, it is common to include the following elements:

- **Course overview and descriptions** - an overview of the program and any requirements
- **Introductions** - place for the learning team and participants to get acquainted with one another
- **Course Materials** - a repository of program materials, available for participants to download in advance of live events
- **Offers and Requests** - space for participants to interact with one another, sharing experiences and information, and seeking support
- **Faculty Consultation** - space in which faculty can host asynchronous discussions with participants, typically following live sessions
- **Project Area** - a place for participants to share completed assignments and receive feedback from the faculty and other participants, or to work on group projects
- **Contact Information** - information on how to contact faculty members and fellow participants
- **Course Library** - a collection of materials related to the course topic. It can be broader than the course materials and can include helpful background information and practical support tools.

There are many, many community platforms available. It is recommended to use platforms that have been specifically designed to support learning programs as these are more likely to have the required features.

[Noddlepod](#) is a community platform that is recommended for this purpose.

## Individual Pre-work

Participants can prepare themselves for the live virtual event by getting acquainted with core ideas or by considering what needs to be tackled in their current work environment.

Activities for individual pre-work include:

- **Readings** - Relevant readings are provided to participants. Shorter articles that can be accessed or shared online are recommended (such as journal articles, media reports, blog posts, white papers). Care should be taken that these readings are incorporated into the live program to take advantage of the engagement that participants have from their preparatory work.
- **Assessments** - By carefully selecting assessment tools, participants can be encouraged to raise their awareness of the current state of affairs. The information gathered from this can be integrated into the live program. The results of the assessment can also inform follow-up actions and application of learning.
- **Videos and pre-recorded material** - these pre-recorded materials are useful ways to provide information to participants, especially if time in the live event is limited (which it almost always will be!). Third-party videos, shared via YouTube, can expose participants to diverse points of view. Faculty members can be recorded introducing portions of the content that will not be covered in the live program, inviting participants to review this material and be prepared to discuss it during the event.
- **Journaling** - this activity can be used to help participants reflect on their current situation. Especially if also used during the Middle and Ending Phases of the learning program, it can help participants move through a cycle of becoming aware of what needs to change, gathering information on how to change this, and then focusing on how they will make needed changes. In addition, journals are useful to track the learning journey, helping participants become aware of how their understanding and awareness develops throughout the learning process.

## B.3 Designing for the Middle - Live Sessions

This Middle phase is the area with which people have the most first-hand experience, and what typically comes to mind when people think of 'virtual learning program.' In this toolkit, we see that the Middle phase is just one part of a broader, more holistic, approach to a learning experience.

The live sessions in virtual learning programs are typically delivered as synchronous sessions. These sessions will be delivered as a 'live' experience, as all the participants are expected to participate at the same time, no matter where they are located. In some cases, especially with programs that cover multiple time zones, live sessions may be repeated at times convenient to participants.

### Designing for Beginning, Middle and Ending in Live Sessions

Once again, the three phases of the Unit of Work is a guide our design of the live sessions. It reminds us that, no matter how long the session will last, it will have a Beginning, a Middle and an Ending:

- **Beginning** - participants arrive and get ready to learn. They may be curious about what will happen and who else will be there. They may wonder whether the session will help them tackle their pressing business needs and performance issues. The activities of the beginning are designed to address these concerns and prepare participants to engage in the rich content that has been prepared for them, in the Middle portion of the program.
- **Middle** - the faculty plays their main role, bringing their expertise and knowledge to the participants through presentations, case studies, and other learning activities. This is not a one-way transmission of information, but a back-and-forth exchange between the faculty, as a resource, and the participants, seeking to find insights and answers that they can apply to their business and performance challenges.
- **Ending** - the learning design steps back in to support the participants in processing what they have learned, to draw out applicable lessons, to set their intentions for action. There is opportunity for reflection, for thanks and appreciation. And information on next steps in the program, in the post-session work and on the community platform can be shared with participants.

#### B.3.1 Audience Engagement

There are many ways of welcoming participants to a live learning event, and also for engaging with them throughout the session. The items listed below can be used in creative ways across the event.

##### Icebreakers and Warm-Up Activities

There are multiple ways in which participants can be welcomed, their voices heard, and their faces seen, and which they are invited to share something of themselves. These are common activities in the Beginning phase of the live event.

**Resource:** <https://blog.trainerswarehouse.com/virtual-icebreakers>

**Resource:** [SessionLab](#) has 30 ice-breakers suitable for virtual settings in its Library (free registration required)

### Chat

Most learning platforms have built-in Chat tools which allow participants to type short messages to the faculty and hosting team, as well as to one another. Learning activities can be designed to make use of this tool, such as asking participants to respond to a question.

Using Chat, with multiple participants to respond at once (i.e. in parallel), allows many perspectives to be shared in a short amount of time. In contrast, hearing from one participant at a time (i.e. in serial), typically by inviting them to speak to the whole group, is slower and limits the number of responses that can be accommodated.

### **Tip:**

- In very large learning events, the volume and pace of responses can be overwhelming. In this case, it is better to use Chat in a very targeted way to collect examples or get feedback from participants.
- Some learning platforms have a Q&A tool. Participants use this to submit questions to the hosting team, but they are typically not answered via written text.

### Polling

Polling is a feature used to collect and display feedback from participants. Common formats for reporting the results include bar graphs and text lists.

Among the core polls that can be used are the following:

- **Single Choice/Multiple Choice**  
Participants select one (or more) items from a list of choices. This format can be used to great effect as part of the Beginning of the live session, as an icebreaker. It can also be used during the Middle of the live event, to check for knowledge understanding, to collect answers to a problem, or to probe how participants might respond to a given scenario. And it can be used in the Ending phase, to check for understanding and application, and as part of closing activities.
- **Open Text**  
Participants contribute single word or short phrases in response to a prompter question. Single word responses can be used to generate Word Clouds. Longer responses can be reported as lists or charts. This format can be used during the Beginning, Middle and Ending phases of the live event.

- **Social Q&A**

With this tool, participants can post questions to be considered by the faculty. Other participants are able to see these questions, and they can upvote or downvote them (the 'social' aspect of this format), allowing everyone to see which questions are most heavily favoured by the group. This tool is useful during presentations and panel discussions, as it allows the moderator to quickly identify questions that interest the largest number of participants.

### *Which Polling Tool is Best?*

Some learning platforms have built-in polling tools. However, these tend to be less sophisticated and have fewer features than 3rd party polling tools.

Popular 3rd party polling tools are:

- Conferences.io <https://www.conferences.io>
- PollEverywhere <https://www.pollerywhere.com>
- Mentimeter <https://www.mentimeter.com>

### **How they work**

Most 3rd party polling tools have plug-in software that integrate them with Powerpoint. Polls are typically created before the event, on the tool's website. Polling slides are then inserted into the presentation using the plug-in software. When the presentation is underway, the slides synchronize with the website server, and responses are instantly tabulated and reported as part of the presentation.

This [short video](#) illustrates how this happens using PollEverywhere.

## **B.3.2 Providing Information**

There are multiple ways of providing information on a topic to participants in a virtual learning program. The nature of the virtual learning environment means that learning designers should take care to identify appropriate and engaging ways to introduce new information and to support participants in making sense of this and helping them integrate this into their work.

It is also important to remember that participants already spend multiple hours each day on web-meetings, and the phenomenon of "Zoom fatigue" has been described as having a draining effect on people, physically, emotionally and cognitively. So it is critical that learning designers are respectful of participants' time and energy, and select only those approaches that will support their learning and application.

### Expert Presentation

This is the default learning activity. It is most familiar to all of us from school and college days, and is perhaps the easiest for the expert to prepare. They simply 'dump' content from their heads into slides, and then read this information to participants in the live session.

This, of course, is a crude generalization. There is a well-deserved place in virtual learning for expert presentations as there is a benefit from having an expert speak to their topic.

One frequent challenge is that experts have forgotten what it is like to be novices! Some experts focus on sharing what they know (demonstrating their expertise), rather than attending to what information the participants need to know to do their work better. The focus on the needs of participants can come through the process of developing the Learning Objectives, and it is always useful to keep them in mind when developing presentations.

**Tip:**

- Design each presentation in short cycles, no longer than 20 minutes each. This breaks the content into 'chunks' or chapters that help participants navigate through a new domain of knowledge. A learning event can have a number of sequential chapters that lead participants through the process of acquiring the new information.
- Intersperse the presentations with other learning activities, including Chat and Polling activities, as well as time for questions, and small group activities.
- Think of each presentation as being a Unit of Work, with its own Beginning-Middle-Ending cycle. This will help you design an introduction to the presentation (why this chapter is relevant to participants), convey the information, and close by helping them see how they can use this in their work.

Panel Discussion

Panel discussions provide a way to hear multiple perspectives on the topic. They can be used in a variety of ways, including:

- Identifying the views of different stakeholder organizations on the topic;
- Exploring how the knowledge has been applied in different settings;
- Hearing divergent views about the topic.

The focus of the discussion should be designed in advance, to ensure that it aligns with the learning objectives. Panelists should be briefed about how they will contribute to the learning focus. Talking points can be prepared for them, to ensure that key messages are conveyed (though the discussion should not be scripted!)

The host of the virtual session can serve as the moderator of the discussion, using prepared questions to draw out views and insights from the panelists.

**Tip:**

- Invite the participants to bring their questions to the panel members. A Q&A poll can be used to collect their questions, with the upvoting being used to identify the most popular items. The moderator can then select questions from the poll to pose to the panelists.
- The panel has a learning purpose, so allow time at the end for participants to summarize their notes and application ideas.

## Case Study

A case study provides an opportunity to engage participants on how their new knowledge can be applied in contexts similar to their own.

There are two main approaches to using case studies in the learning environment:

- The presenter introduces a case based on work they have carried out. The story is interrupted at key points and participants are engaged to respond with their own analysis of the situation or are asked to identify potential actions/interventions. After a discussion on the participant responses, the presenter reveals what they did, and why they chose this action. The story continues, with further key points being examined in a similar way. The case study concludes with the presenter sharing the results and impact of their work.
- The presenter introduces a fictional story, typically a composite based on real-world experience. Participants are invited to suggest interventions at key points. The merits of these interventions are discussed before the next part of the story is introduced. As this is a fictional case, there is no real-world impact that can be debriefed. The presenter may provide an idealized description of what to do, with acknowledgement that there may be multiple approaches that could be applied.

### **Tip:**

- A variety of interactive methods can be used to engage participants throughout the case story. Chat can be used to hear their ideas and questions, while Polls can assess which actions they prefer.
- Participant reflection and analysis can likewise be done in different ways. It can be set up as an individual or pairs task. It can also be designed as a small group discussion, though this is more typically done with a more in-depth case study where there is sufficient time for both the group discussions and reports.

## Interview

An interview can be an engaging way to introduce new information to participants. The interview format involves an expert being interviewed by the host (this may be a member of the hosting team, or another expert who is also giving an expert presentation).

The expert interviewer can be a content expert, bringing new information, or a context expert, describing their experience of applying the information in particular situations. This is helpful for participants, as it illustrates the real-world value of the information they are learning.

As with other activities, participants can pose their questions through Chat and Polls.

## Video Clips

Videos can be a very useful tool in virtual learning programs. Where an in-person program might include site visits, videos can be used to transport participants to a range of locations to see examples of the information being applied in different ways.



Videos are also valuable in behavior-related training. They can be used to model both poor and good examples of the desired behaviors. Participants can be engaged to identify how the skills or behaviors are being applied.

Video clips should be shown in short segments (up to 4-5 minutes). Videos are rich sensory environments, and there is a lot of cognitive attention required to pay attention to the story, movement, sound, and backdrops. A longer video should be shown in shorter segments to accommodate this reality, interspersed with participant engagement.

**Tip:**

- While videos can be incorporated into slide shows, this can also require a lot of bandwidth to show during the live presentation. It may be better to have a video file that can be played directly. (it is also better not to rely on videos on websites for a similar reason)

Questions and Answers (Q&A)

The familiar Question and Answer session is a good opportunity to hear from participants, allowing them to clarify elements they may not understand, and to explore how they might apply the new information.

A challenge in virtual learning programs is that there may be no response to an invitation to submit questions! There are a number of ways that the host can “prime the pump” for questions:

- Invite participants to pose their questions as they arise, using the Chat tool. The host can then periodically alert the presenter to relevant questions and comments for their response.
- Use the Q&A poll to collect and prioritize questions. This helps focus the presenter’s response on the questions of greatest interest to the group at large.
- Give the participants a few minutes to meet in pairs or small groups. This gives them a chance to digest the content they have just received, and then they can prepare questions for the presenter.

The Q&A can also be focused according to the needs of the session:

- Are these questions for clarification, checking for understanding?
- Will participants be asked how they are making sense of what they have just learnt? This allows them to ponder the relevance of the content to what they already know.
- Are the questions being used to prompt participants on how they will apply the learning into their own work environments? They may want to hear more details to be able to implement their lessons for a positive impact.

Recaps

The Recap is an important, but sometimes forgotten, part of providing new information to participants. The Recap provides the expert presenter with an opportunity to highlight what they see as the key learning points, to emphasize these for the participants.

The Recap is an Ending, it rounds out a session (or a shorter chapter within a session), by linking to the purpose of the session.

The Recap also serves as a reminder to participants to engage in their own summarizing - both key content ideas and emerging application ideas. By keeping an action list as the virtual program progresses, participants will have an action list to focus their attention when they return to work.

This helps with one of the challenges of virtual learning programs - they typically take place in the midst of the workday, and participants are likely to immediately transition to tasks that are waiting for them. Unlike in-person programs, there is little or no transition time between being a learner and being a worker. So building time in the virtual program for participants to prepare their summary notes can be especially helpful.

**Tip:**

- The Digitell platform uses a Notes tool. When participants use this to capture key summaries and action ideas, the system will email them this information when the session ends.

### **B.2.3 Small Group Interactions**

While hearing from experts is a key component of virtual learning programs, there is also rich learning that takes place when participants interact with their peers. This gives them an opportunity to be vulnerable, to explore being novices in the topic, and to be supported in their learning journey by people in a similar working environment. It is also a space for peer learning, to build networks and to hear how their colleagues are dealing with similar challenges.

#### Pairs/Triads

After individual tasks, this is the smallest level of group work. Working with just one or two other people, participants can feel safe to share their confusion and uncertainties. They can test their questions and ideas with others, and get feedback, before raising them with the whole group.

The pairs/triads can be used throughout the learning process and are very supportive in engaging participants to meet the learning objectives.

- **Beginning** - why are you here? What do you already know about this topic? What conditions do you face in your working environment? What do you want to learn from the expert?
- **Middle** - is this new content making sense? What are you drawing from this material? How does this relate to what you already know? How does this content inform what you think you might do at work?
- **Ending** - what have been your key insights? What questions do you still have? What are your action ideas? How can we help you apply this new knowledge?

**Tip:**

- These small group activities can be designed as safe spaces for participant reflection and meaning-making. There may be no need for participants to report back to the large group about what they discussed.
- On other occasions, the small group can be designed to help participants identify and prepare their questions. On returning from the group activity, each group can share their questions or insights for the expert presenter's response.

### Breakout Groups

Breakout groups can be used in addition to Pairs/Triads, as they serve a different purpose. These are bigger groups of up to 6 participants that are typically given a task by the expert presenter. The task is designed as an activity in which participants will grapple with the new content they have just received and during which they might be asked to:

- **Have a Discussion** - this is a chance for participants to interact with their fellow participants and to hear how others are relating to the new information. This can be a comfort as they may realize they are not alone in feeling lost in the midst of a lot of new and complicated information. It can help them clarify questions they want to pose to the presenter. And it can help them discover what they have in common with other participants.
- **Problem-Solving** - this task can be given to participants during a case study exercise. Working in their small groups, participants have time to review the challenges in the case and to explore what actions they might recommend be taken. The results of this discussion can be reported back to the large group.
- **Practice and Feedback** - small groups are a good venue in virtual learning programs to practice new skills and get feedback from their peers. This can be particularly useful in programs where new skills or behaviors are being introduced, such as Giving Performance Feedback, or practicing Active Listening.
- **Reflection** - the small group can become a trusting environment within which participants can share with each other the meaning they are making of their learning program. It is a chance to share their insights and to explore their questions for application.
- **Application** - participants can focus on their action plans, especially towards the end of the learning program. They can describe to their peers how they are planning to tackle work challenges, and benefit from coaching from peers on how best they might do this.

### Peer Group (Peer Coaching)

Using Peer Groups in a virtual learning program allows participants to connect with one another around the work-related challenges with which they are grappling. While these challenges will typically relate to the content of the learning program, participants are trusted to work on issues that matter to them.

Once trusting relationships are established in the small group, peer coaching can take place. This is an opportunity for one participant to describe a work challenge to their peers. The peers then bring

questions, share their own similar experiences, identify resources they have used, and make suggestions. The problem owner is welcome to accept or reject any of this input!

The value of hearing from peers, rather than the expert presenter, is that the peers occupy similar roles in comparable organizations. They are likely to have faced very similar situations themselves, and their hard-won insights can be particularly useful. While experts can share more generalized knowledge, it is likely that it has been some time since they themselves were in the managerial “hot seat.”

**Tip:**

- A useful format for running Peer Coaching sessions is provided by the “[Wise Crowd](#)” activity developed by Liberating Structures. This activity provides a timed breakdown that participants can use to manage themselves through the peer coaching activity.

## B.4 Designing for Endings - Post-Session Work

The final phase of the learning design process, designing for Endings, aims to support participants in consolidating their learning and in their implementation of planned changes. The focus is on the transition from virtual classroom to work, from learning to action.

As learning is, at its core, fundamentally a social process, the design activities in this phase include both individual and group elements.

### B.4.1 Designing the Duration of the post-work

As with all the other parts of the learning design process, the design work in this phase involves making intentional choices about what elements to include and for how long the post-work activities should continue. This is not an arbitrary choice. Rather, the drivers of these design decisions are likely to include a consideration of the business needs and the learning objectives that anchor the learning program. If you expect the participants to introduce and manage important changes in their organization's work processes, then it is worth considering how to support them while they apply the knowledge gained from the program. While access to expert presenters and technical assistance might not be possible, there is much that can be gained from peer support, including peer coaching.

The length of the virtual learning program will also be a factor in how you design the post-work elements. A short, one-time session of up to two hours can be designed with some focused individual follow-up and application activities. A longer, multiple session program that extends over several days or weeks will warrant the investment in both individual and collective elements, as well as establishing a structure that extends over several weeks or months. In such a program, it can be valuable to have periodic check-in calls that include expert presenters, allowing them to comment and add further ideas to the experiences being reported on by participants.

### B.4.2 Individual Post-work

The focus of individual post-session learning activities is to support individual participants as they translate their learning into action plans. These activities can be introduced at the end of the live virtual session, with participants taking responsibility to carry them out. The activities can also be released to participants at a planned schedule following the event, so the application work takes place in a number of sequential steps.

#### Application assignments

Participants can be invited to review what they have learned during the session and plan for actions they can take to implement these lessons into their work. While there are many ways of structuring activities like this, a useful framework is based on the following three questions:

- **What?** The first step is to distill what has been learned (the content of the learning program). What new information has the participant collected? What key points did they capture during the periodic recaps? What action ideas came to them during the program? By assembling their notes,


participants are being helped to structure and synthesize the value from the virtual learning program.

- **So What?** The second step gives the participants the opportunity to make meaning from all the content they have received. How do the new ideas and information relate to what they knew and understood before the program? In what ways are their mental models shifting and being updated, bringing new understanding, new ways of seeing and making sense of issues?
- **Now What?** The final step allows the participants to focus on particular challenges they want to tackle. This enables them to bring their new knowledge and tools to bear on these workplace issues, whether new business opportunities or performance gaps. This step benefits from careful planning, as they will likely need to engage their colleagues and team members in any planned changes. They should consider carefully how they will introduce the need for change and how they will promote the tools they have learned can be useful for these issues. Participants will also need to work out the steps to be followed throughout the process, so they can adjust and update their plan based on new developments.

### Reflective journaling

Reflective journaling is an activity that helps participants make sense of their ongoing learning journey, both in the immediate period after the virtual learning event and as they apply their lessons. This can help them in learning from their experience with implementation, enabling them to become 'reflective practitioners' (this phrase was coined by Donald Schon) as they gain further insights into themselves and into their practice.

A useful format for Reflective Journaling invites participants to work on four inquiries, in sequence:

	<p><b>Action</b> This means carrying out tasks or engaging in processes. Our experience includes what we do as well as how we feel about it.</p>
	<p><b>Reflection</b> This involves re-examining and thinking about an event. We make the experience conscious, so we analyze, evaluate and come to understand it. It can often involve comparing what we expected with what actually happened.</p>
	<p><b>Learning</b> Reflection does not always result in learning! We need to move from the specific experience to generalize the learning to be applied in other situations. In doing so, we make the lessons conscious and easier to act on.</p>
	<p><b>Planning</b> This is the link between past learning and future learning. You bring together your previous experience and learning to identify what you will do differently to help you achieve your goals. It allows you to be proactive rather than reactive.</p>

The journaling can be a private activity, personal to each participant. Alternate approaches include submitting their journals to the learning program, as one way to assess how well the participants have

understood and implemented what they learnt or sharing their journals with a buddy or peer group, for accountability and support.

### **B.4.3 Collective Post-work**

There are two main reasons for including collective learning activities in the post-session learning plan. The first is for accountability. By sharing your plans with other participants, there is a higher likelihood that the plans will be carried out. The second reason is for peer group support. Implementation will never be as smooth as initially identified, and the support of the peer group can help individuals make sense of their applied experience and get ideas for how to proceed.

#### Study Buddies

Study Buddies, or Accountability Partners, is the most basic form for both accountability and peer support. Participants are paired up to work together for a period of time, meeting on an agreed schedule. Their conversations can include check-ins and progress updates, as well as reflective conversations about what they are learning from their experience. Partners might share their reflective journals with one another, or at least use these as a catalyst in their discussions.

#### Peer Groups

Peer Groups take the Study Buddy concept and expand the size of the group. A group of five or six participants can bring a variety of perspectives and experiences, adding to the diversity of ideas that are available for tackling challenges.

It can be helpful to develop a social learning contract in the peer group, where the frequency of meetings, roles, and group structure are agreed upon. A useful anchor for the peer group discussions is the applied experience, with reflections, of group members.

One approach that many peer groups find useful is to structure their meetings around the “[Wise Crowd](#)” activity developed by Liberating Structures (this was introduced in the previous section as a tool for peer coaching).

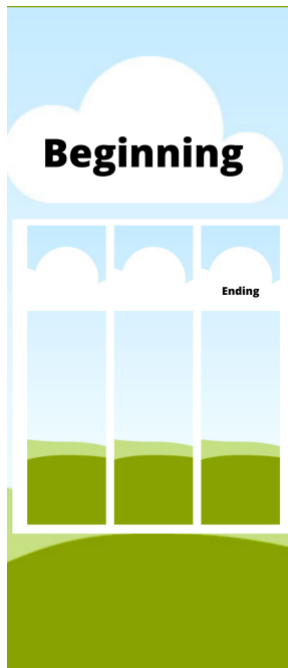
#### Group Action Learning projects

Small groups can be set up with a more structured purpose than just peer support. They can also be used as a vehicle to advance participant learning as part of the virtual learning program. This can work well in longer, multi-part programs, with the action learning groups reporting on a project in later sessions.

Action Learning projects are opportunities for participants to apply new knowledge in real-world situations. They are a group-level activity that engage all members of the group in analysis, sense-making, developing recommendations, and reporting.

Combined with reflective journaling, these applied projects are rich sources of learning for participants.

## C. Beginning - Ending



The final phase of the learning design process, the Ending, provides the opportunity to bring together the work from the Beginning (the context analysis and the learning objectives) with the design elements identified and selected during the Middle phase.

This will become integrated into the program curriculum and materials. These materials are typically intended for use in successive programs, so it is helpful to create them as documents that can be easily viewed and shared with colleagues.

As the learning design process typically is a team effort, this stage should be carried out as collaborative activities. While one person might be responsible for drafting the program curriculum, another might prepare the presentations and handouts. It is very helpful for team members to be able to view this work whilst it is in the process of being developed, enabling joint editing, and enriching the design process by tapping multiple perspectives.

### C.1 Design Tools

The purpose of the Design Tools is to allow the learning design team to map out the various elements of the virtual program. It is helpful to step back and consider all the elements that will need to come together before diving into the detailed development of individual sessions. As the design is the result of a team effort, this mapping of the program allows the team to view and comment on the draft as it is refined.

It is helpful to use a visual process to develop a Storyboard for the new program. This brings together in one place all the relevant information about the program. This will assist you in keeping the Purpose visible, along with the profile of the expected audience and the Learning Objectives that have been developed. As you identify the various learning elements that will be used for pre-session activities, the details of the live events, and the components of the post-session work, they can easily be viewed in relation to the Purpose, Audience and Learning Objectives. This serves as a self-check, ensuring there is continued alignment between the strategic intent of the program and its operational details.

There are a number of different ways to prepare visual storyboards. Two common tools are mind maps and electronic whiteboards.

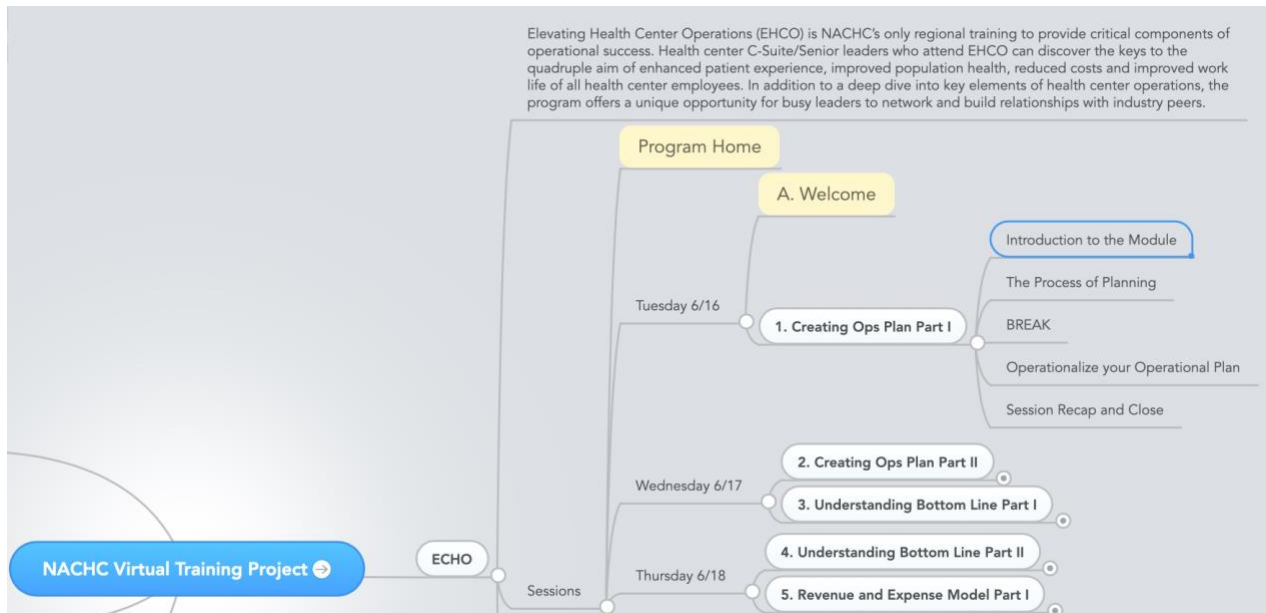
#### Mind Mapping

Mind maps are a method for visually organizing information. A mind map is hierarchical, and it identifies the relationships among pieces of the whole program. The standard approach to mind mapping builds the



relationships from a central concept, using various branches to indicate the major components. Additional branches and sub-branches can be added to bring more detail to the map.

This visual display allows reviewers to see the various design elements in context. It can help identify missing elements, and it can surface concerns about whether certain learning activities are being overused.

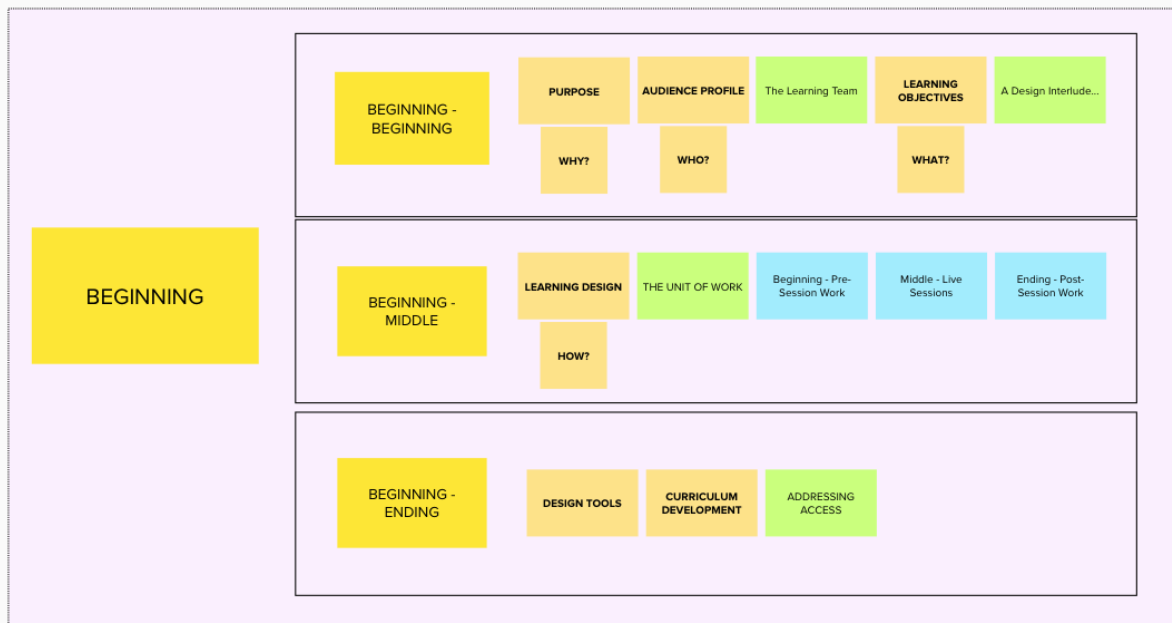


Many of the web-based mind mapping tools allow you to insert images, files and hyperlinks. Both free and subscription-based tools typically allow for collaboration, with multiple people serving as authors, and also have the ability to accept comments.

**Mindmeister** (freemium model - i.e. with a basic account available free of charge, and a variety of pricing for subscription models) is suggested as a versatile and robust tool for mind mapping. ([www.MindMeister.com](http://www.MindMeister.com))

## Electronic Whiteboards

Electronic Whiteboards are becoming an increasingly common tool in virtual collaboration and amongst distributed work teams. They are web-based tools that allow participants to create and edit information using the metaphors of a whiteboard and sticky notes. As the notes can easily be edited, duplicated, and moved around, they are common ways to represent the components of a virtual learning program, to present them to stakeholders and to receive feedback.



Many of the web-based whiteboarding tools allow you to insert images, files and hyperlinks. Both free and subscription-based tools typically allow for collaboration, with multiple people serving as authors, and also have the ability to accept comments.

**Mural** (freemium model - i.e. with a basic account available free of charge, and a variety of pricing for subscription models) is suggested as a versatile and robust tool for creating visual storyboards. ([www.Mural.co](http://www.Mural.co))

## C.2 Curriculum Development

At long last, it's time to start writing up the curriculum for the new virtual program! This is the step in which all the program elements will be specified in detail, showing the transitions from one section to the next.

It is important to include this detail in the program documents as there will be a variety of people involved in carrying out the range of activities associated with a virtual learning program. And as it is a virtual program, it is highly likely that team members will not be in the same location - so there is an extra responsibility to make sure that all the program elements and details have been clearly spelled out, so everyone knows both their role and what others are doing.

The curriculum is essentially a detailed agenda, outlining all the elements in the pre-, live, and post-event phases of the program. It also specifies how each element will be opened and closed, and how transitions from one element to the next will be managed.

It is most helpful to use a tool that can hold and manage text. While a Word document can fit this purpose, there are specialized tools that make the task of curriculum development a lot easier for the learning design team.

As this is a team task, it is highly desirable to use tools that support collaboration. Two tools that are suggested for this activity are:

- **Google Docs** - as the document lives online, it can easily be accessed and edited by team members. It includes Version History, making it possible to find and retrieve earlier materials.
- **SessionLab** - this is a web-based tool developed specifically to meet the needs of trainers. It provides a set of tools that simplify the process of developing individual sessions. It automatically tracks the time allocated for sessions, updating the timing as components are edited. It can also include program materials and instructions for conducting activities. Material can be re-used as needed, either in different parts of the program, or across different programs.

[www.SessionLab.com](http://www.SessionLab.com) - (freemium model - i.e. with a basic account available free of charge, and a variety of pricing for subscription models)

## Elevating Health Center Operations (EHCO)

Day 1	02h 20'	Day 2	02h 30'	Day 3	02h 15'
Jun 16, 2020 NACHC		Jun 17, 2020 NACHC		Jun 18, 2020 NACHC	
2:00 PM Day 1 overview 0'		2:00 PM Day 2 overview 0'		2:00 PM Day 3 overview 0'	
2:00 PM A. Welcome		2:00 PM Session 2. Module One: Creati...		2:00 PM Session 4. Module Two: Unde...	
2:00 PM Welcome 5'		2:00 PM Module Description 0'		2:00 PM Module Description 0'	
2:05 PM Practice Engagements 10'				2:00 PM Welcome 2'	
2:15 PM Overview of the Program 5'		2:00 PM 2. Creating an Operations Pla...		2:02 PM 3. Operational Drivers of the ...	
2:20 PM Session 1. Module One: Creati...		2:00 PM Session Introduction (Slide...	5'	2:02 PM 3.1 Recap of the 3 Key Driv...	8'
2:20 PM Module Description 0'		2:05 PM Review of Day 1 - 6 Step Pr...	2'	2:10 PM 3.2 Filling Capacity 3'	
2:20 PM Creating an Operations Plan: ...		2:07 PM Executing on Your Operati...	10'	2:13 PM 3.3 Provider Capacity and ... 5'	
2:20 PM Introduction of Session 1: ... 1'		2:17 PM Introduce the COVID Oper...	3'	2:18 PM 3.4 Capacity and Cost 5'	
2:21 PM Learning Objectives (Slide ... 2'		2:20 PM BREAK (Slide 73) 5'		2:23 PM 3.5 Recap 2'	
2:23 PM Which of the following bes... 2'		2:25 PM What is your "True North" ... 5'		2:25 PM 4. Operational Drivers of the ...	
2:25 PM The Process of Planning		2:30 PM Share your strategic goal ... 5'		2:25 PM 4.1 Payor Mix 7'	
2:25 PM Operational Plans Overvie... 6'		2:35 PM Share any barriers you ide... 5'		2:32 PM 3.5 Recap 2'	
2:31 PM Which of the following mo... 2'		2:40 PM Share your operational go... 5'		2:34 PM BREAK 3'	
2:33 PM What is your process for m... 2'		2:45 PM How will you measure you... 5'		2:37 PM 5. Health Center Bottom Lines...	
2:35 PM Which statement best des... 2'		2:50 PM What key initiatives will yo... 5'		2:37 PM 5.1 COVID Funding 20'	
2:37 PM Creating Value from an Op... 6'		2:55 PM BREAK (Slide 80) 5'		2:57 PM 6. Module Summary	
2:43 PM Recap (Slide 17) 2'		3:00 PM Creating a Culture for Success...		2:57 PM 6.1 Resources 1'	
2:45 PM Do you have any question... 3'		3:00 PM Systemic Needs vs Functio...	2'	2:58 PM 6.2 Recap 2'	
2:48 PM Introduce the Operational ... 2'		3:02 PM Does your culture support ... 3'		3:00 PM BREAK 5'	
2:50 PM Break (Slide 21) 5'		3:05 PM Systemic Needs (Slide 84 - ... 7'		3:05 PM Session 5. Module Three: The ...	
		3:12 PM Functional Needs (Slide 90... 7'			
		3:19 PM Do you have a data-driven ... 3'			

## Components of the Curriculum Document

In general, the more detail that can be included in the curriculum document, the better. This helps everyone be clear on timing, steps, transitions and roles.

However, there is a practical limit to keep in mind. You don't want presenters to sound wooden and scripted (because they're reading from a script!). But you do want to make sure that there are talking points for each element to support the presenters and the participants by making sure that the main ideas are covered.

And you want to make sure that team members, especially during live events, have prepared their elements in good time. It can be frustrating to delay launching a small group activity because the tech host didn't realize that they needed to create breakout rooms by a particular time in the agenda. This sort of slip-up can be avoided through detailed plans and good communication.

A curriculum document that is helpful for team members will typically include the following elements:

- **Date and Program information** - to help ensure that correct material is being used for the current session

- **Timing** - it helps to indicate both the planned start time of an element, as well as the planned duration of the element
- **Session Title**
- **Session Goal** - the specific purpose of this activity. It helps if this can be linked to the overall Goals for the Program
- **Session Description** - to reveal the sequence of steps needed to carry out this activity; it can also identify transitions from earlier activities and to subsequent steps.
- **Talking Points** - describes main points for the presenter to convey to participants; it may also provide instructions to set up activities or suggest questions for debriefing completed activities.
- **Session Notes** - supplementary information that can be helpful for the presenter; or preparatory steps for action by team members
- **List of Materials** - this may identify a particular sequence of slides in a longer presentation or may direct participants to specific places in their workbooks or identify handouts for distribution.

## Timing and Pacing

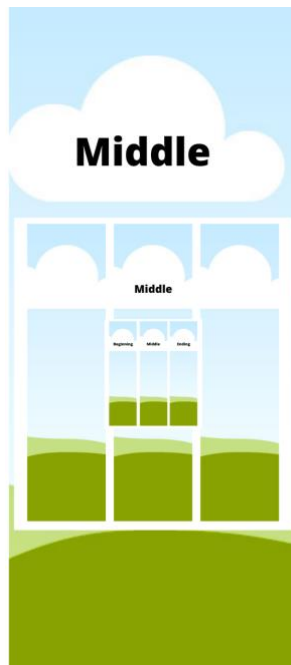
In developing the detailed curriculum plan, it is important to design from the perspective of the participants. How much can they absorb in a single sitting? For how long can they concentrate on taking in new information? How much time should pass before they are asked to respond to a presentation?

In working environments where people spend large amounts of time each day in virtual meetings, “Zoom Fatigue” can be a serious impediment to learning. So we need to design live sessions with the comfort of participants in mind, knowing that they will be more attentive to learning, and more active in their engagement, when they feel fresher.

While in-person programs are often designed to fill an 8-hour day, this approach will be counter-productive for virtual programs. A useful rule of thumb is to design sessions that run for 60 to 90 minutes. If needed, a second session of the same duration can start after a break. Sessions that run longer than 90 minutes without meaningful breaks may well see a decline in learning and engagement.

However, this does not mean that a 60- or 90-minute session can run without interruption! It is a good practice to have some form of participant engagement every 10 to 15 minutes. This may be as simple as a break in the presentation to collect and respond to questions. Or it may be a more structured activity that sets up paired discussions or uses a poll to collect and discuss responses to a question from the presenter.

## Designing for the Beginning - Middle - Ending within a Session



Our core concept of the Unit of Work is also present in the midst of the curriculum. Each element of the program needs to be understood in terms of our three elements of Beginning - Middle - Ending, whether we are starting a 90 minute session, or getting into a 30 minute presentation of content and information.

The three elements are used to set the stage for participants, helping them navigate through the program and the individual session:




**Beginning** - What is the purpose of this element? How does it link to what came before? What will we be doing in this session?

**Middle** - Here's what you need to know about this topic. Here's a small group activity in which you will participate.




**Ending** - Let's recap the content we just introduced. Take some time to summarize your key insights. Identify action steps you will share with colleagues in your organization.

## A Technology Review for Hosts and Faculty





### Prepare Your Tools

	<b>Computer and Monitor</b> <ul style="list-style-type: none"><li>It is recommended, if possible, to have 2 screens available: your computer + a second monitor. This will allow you to easily present your PowerPoint slides whilst also accessing the Zoom controls.</li></ul>
	<b>Webcam</b> <ul style="list-style-type: none"><li>Digitell recommends a high-definition camera with a definition of 1080 pixels. As built-in laptop webcams are typically not of sufficient quality, they recommend the Logitech HD Pro Webcam C920 which can be placed on top of your computer or monitor.</li><li>Note: this model and its successor are both sold out in Amazon. You can try alternative hi-def models.</li></ul>
	<b>Audio</b> <ul style="list-style-type: none"><li>You should use a headset and microphone, especially to improve microphone quality. This also helps to reduce the impact of ambient/surrounding sounds being picked up and broadcast by the microphone.</li><li>A wired connection from the headset to the computer helps avoid Bluetooth and charging issues with wireless models.</li></ul>

### Prepare Your Studio

	<b>Keep it Quiet and Free of interruptions</b> <ul style="list-style-type: none"><li>If you can, place a sign on the door so family members and others know not to interrupt you.</li><li>Closing the door will keep pets and small children out (no guarantees!)</li></ul>
	<b>Lighting</b> <ul style="list-style-type: none"><li>Test your setup at the same time of day as your planned session. What lighting is needed in the room? Does afternoon sunlight make the room brighter than at other times of day?</li><li>Avoid having your back to a window, as you can end up in silhouette!</li><li>Consider using a Ring Light to ensure your face is evenly lit from the front (or the side, to compensate for natural light placing half your face in shadow)</li></ul>
	<b>Backdrop</b> <ul style="list-style-type: none"><li>Try to avoid backdrops that are busy, cluttered, or may have people walking past (this is more challenging during the COVID-crisis)</li><li>Consider hanging fabric in front of a book-case or closet.</li><li>Experiment with one of the Zoom Virtual Backgrounds, where you can add your own image to the library.</li></ul>

## Prepare Your Workspace

	<b>Have a Plan B to join the Session</b> <ul style="list-style-type: none"><li>• Print out the phone number to join the session by audio if needed.</li><li>• Ensure the Hosting Team has a copy of your slide deck so they can continue to share these with participants if you lose access to the session.</li></ul>
	<b>Clear Away Distractions</b> <ul style="list-style-type: none"><li>• Close any apps on your computer that you won't be using.</li><li>• Disable notifications and alerts from your computer and phone.</li></ul>
	<b>Have Hard Copies of the Session and Slide Deck to hand</b> <ul style="list-style-type: none"><li>• Print out the Session Design (from SessionLab). This will help you stay alert to the planned timing flow of the session, and to more easily see where you might need to make adjustments to your plans.</li><li>• Print out your presentation. If you lose connection to the session, you can continue to speak to your slides while they are being presented by the Hosting Team.</li></ul>
	<b>Create a Group Messaging Chat with the Hosting Team</b> <ul style="list-style-type: none"><li>• This allows quick and easy communication to the whole team, without needing to navigate through the Digitell chat tool.</li><li>• Use it to share time warnings, feedback on camera/audio issues, or to signal a change in plan.</li></ul>



## Resources

Armstrong, Patricia (nd) **Bloom's Taxonomy** Center for Teaching, Vanderbilt University

[Link](#)

Learning for Nature (2020) **Virtual Engagement Guide: Tips and Best Practices. How to maximise engagement during virtual conferences, online courses and meetings**

[Link](#)

White and Leslie (2016) **Resource Guide to Learning Delivery Methods: a shared resource emerging from work done for the ILO Impact Insurance Facility**

[Link](#)