



Online Facilitation tips

Hosting and running events and training online has huge benefits however it has also created new and familiar challenges as an online trainer/facilitator. This document provides some tips on how to effectively facilitate and run online sessions, and if you have any additional tips or feedback, please let us know.

1. Working with your co-trainer

Ensure you have a pre-meeting with your co trainer, especially if you have not worked with them before. At this meeting decide on who will cover which sections and how you can add additional points to a section the other person is delivering. This is to ensure any additions are not disruptive to the listener and don't distract you. E.g., you may agree to only add points after the trainer has finished their section or at specific points you may ask your co-trainer to add any further comments.

2. Set the objectives – say it once, say it twice, third time is a charm

You will set out the objectives of a session at the beginning explaining the purpose and what the session will cover, remind participants of the u3a way of sharing & learning from each other, and that everyone has a role to play at this session. You should also establish that this is a safe space for discussion and everyone's input is valid and welcome.

If during the session you find discussions are going off track it can be useful to repeat the objectives, reinforcing the purpose of the session.

3. Sharing and keeping to schedule

In the introductory section you will outline the structure and explain where group discussion will take place, how the presentation will develop and where the questions can be asked.

As you deliver the session there will need to be some element of flexibility depending on the needs of participants, though where possible you should stick to the timings and clearly share how long a break, breakout room etc will last.

During a session it is likely discussion may move away from the focus of the session, there might be a participant who dominates the discussion or lots of questions are



raised about a certain point. There are many ways to bring the focus back to the objectives of the session including:

- Parking the discussion – thank the attendee for their contribution or question and it might be relevant to pick up the conversation in another section. If however, the topic will not be covered in detail, you can offer to pick it up later if there is time or share some links after the session.
- Signposting – this is a way of moving on the conversation by signposting to emails, links, website resources, u3a office support, mailings etc.
- Save it to the end – you could save a discussion to the end of the session if there is time or offer to find out more and send them further information after the session.
- Explain you need to hear from others – if there are others wanting to contribute or haven't had an opportunity you can use this to move the conversation on and invite others to contribute.

4. Participant participation

Whilst you will want to encourage participation from participants, it is sometimes the case that these sections over run. To try and keep to schedule, here are some tips:

- If attendees are invited to introduce themselves be clear and ask for specific points e.g., name, role, name of their u3a, and why they wanted to attend the session or what they hope to get out of it
- At plenaries asking attendees to be concise may not always work, so ask for specifics and be direct, i.e., we need 4 points from each group and let's focus on the question.
- Online round robins don't work because onscreen participants don't know who is next, directly ask and nominate a participant.
- Remember what you have said – if your instructions were to take 4 more questions, don't be tempted to go onto the 5th and 6th!

5. Creating and maintaining positivity

Participants value meeting other u3a members, networking and sharing ideas. Creating a positive learning environment is often dependent on the energy of the group and the facilitator.

Energy is key to face to face and even more so for online meetings. Being enthusiastic, animated and positive is key. For example, if you are in a good mood, you will run a better session – if your mood is a bit low, you could ask your co-presenter to kick off the session.

You will be able to sense if a session is going well and some of the positive signs are, good discussions, shared acknowledgement, attendees thanking others for a helpful tip, humour and questions. If the session isn't going as well as you expected or there is some negativity, here are some tips:

- Don't let people into the session too early and keep the start sociable. A good starting point is finding out where everyone is from.
- Where individuals are frustrated at Trust or local u3as or are looking for additional support, the best thing to say is "I will make a note and pass it on to the Trust" and to remind attendees that they can contact their Regional Trustee or the u3a office for individual advice and support
- Remind attendees of the shared objectives, u3a experience and networking opportunities.
- Be assertive, be positive and acknowledge points being made.

6. Dealing with conflict

Adversarial conversations with a participant can creep in by accident. If this is happening acknowledge the points being made rather than providing space for the conversation to continue. However, if what is being said is clearly incorrect e.g., the u3a has 5 principles, then as a Trainer you should correct the information.

As a Trust Volunteer Trainer, it is important to remember that you are representing the Trust and there may be times when your views may differ. You should keep to the Trust point of view, advice, website and guidance.

7. Communication & Connection

Make sure your image is clear, if you appear a bit off screen or you can't clearly be seen it can be hard for attendees to connect with you. More information on getting set up and on protocols for ensuring accessibility in meetings and presentations are available for download on the u3a website. Additional links are also available on [u3a - Equality, Diversity and Inclusion](#).

Be clear on how communication will be managed during the session. This may be a combination of ways such as, using the chat, saving the questions to the end, you can now unmute yourself and speak, using the raised hand icon, or we will take 3 more comments. As facilitator whichever method you may decide, be clear to ensure participants understand. Other tips for building a rapport with participants are:

- Use the gallery view on Zoom to see how participants are engaging with the session (this can sometimes be more difficult as many normal visual cues are missing)



- By sharing your u3a examples it shows you understand the topic and can bring authenticity – however you should ensure there is a balance between this and the content of the session
- Encourage participants to share and value input of others
- Positively respond to contributions
- Side discussions may take place e.g., in the chat. You could ask participants to share the topic or to encourage them to have the discussion at break.
- Be aware of your own biases e.g., gender, size of u3as, nation & regions, cities, rural.

Remember, tech can move slowly, so if you are waiting for someone to unmute, mute, share slides etc it might just need a couple of seconds more than you think it will take.

Breakout rooms

Breakout rooms can be tricky as you are not in control, however participants often feedback that this is where meaningful discussions have taken place and they very much value the space these provide. To ensure these go well:

- Give clear instructions and ask if anyone has any questions before moving to breakout rooms
- Explain the steps e.g., will need to click to join the room, will have 10 minutes for discussion and you will ask each group to feed back three key points
- Ask the group to nominate a spokesperson
- Give clear instructions when requesting group feedback that should be simple and concise to allow everyone the chance to share their groups' thoughts.

8. Useful phrases

- Thank you for your contribution
- That brings us back to the point X was making
- How can we relate that idea back to the original problem
- We really need to conclude this discussion by (specific time) so have time for two more thoughts ...
- You can add "that is an interesting idea, unfortunately we are not able to explore this today"
- How can we relate this to the original questions or scenario?
- You make a great point and to add to that...
- I understand the points you are making, however the Trust view on this is...
- There is further support and advice on the topic on the website/at the upcoming workshop and we can circulate the link in the follow up email.