



Pacific Southwest Mental Health Technology Transfer Center

VIRTUAL LEARNING GUIDE

*Supporting those who use virtual platforms to support the mental health
and school mental health workforce*



Welcome to the Pacific Southwest MHTTC¹ Virtual Learning Guide.

Our primary focus is providing high quality professional development for the mental and school mental health workforce; we created this guide to support both learners and leaders who use virtual platforms to support the mental health and school mental health workforce in our region. As more of us shift to new forms of distance learning, we hope this guide will be timely, relevant, and useful.

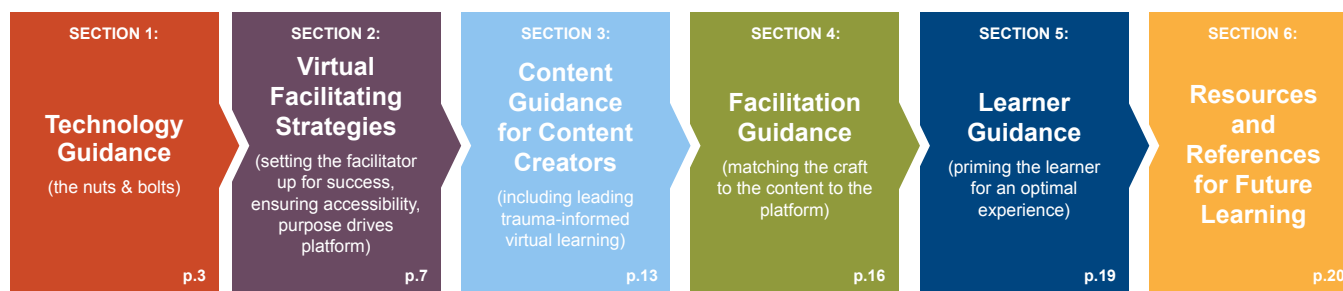
What this guide is:

- This guide is based off of an internal guidance document that the Center for Applied Research Solutions (the umbrella organization of the PS MHTTC) created for their internal specialists and partners. We hope our guidance can be a launchpad for your agency, organization, or team's navigation of virtual learning. Please take, adapt, adopt, and make this your own, and disseminate as is useful.
- This guide provides a walkthrough of both the technical (platforms) and the interactive (the pedagogy) strategies and approaches to virtual learning
- This guide is written for facilitators and presenters who are leading professional development and group learning online.

What this guide is not:

- A guide to creating online courses or to transitioning classes to an online format (though there are many tips that can apply) for k-12 and higher education contexts.
- A guide to telehealth services and systems
- A comprehensive go-to resource on all things virtual: we lightly touch on social media platforms (e.g. Facebook or Instagram Live), and we know there are many other platforms out there
- A comprehensive go-to resource on all things virtual school and mental telehealth²

The guide is structured into the following sections:



Delivery & Design: Both Matter, Equally

The **delivery to learners** should acknowledge that learners integrate new things in this sequence: Technology → Content → Pedagogy (How, then What, then Why). Learners must first understand how to use the tool, before they can process the ideas and concepts presented through the tool. It's difficult for learners to integrate new skills and content and application suggestions at the same time (for example, when learning to cook, you might first learn the knife skills before engaging in cooking). Differently, **when designing** professional development through virtual platforms, presenters should first identify the learning outcomes, pedagogy, content, and then select the modality to meet those outcomes: Outcomes → Pedagogy → Content → Technology (Why & who, then what, then how. This guide's sections are sequenced accordingly.

Virtual & In Person: Both Matter, Equitably

Virtual learning has its place and there are many benefits, particularly in audience outreach. And, virtual learning is not an equal replacement for in-person learning. Circumstances may necessitate virtual learning, but it's crucial to be attuned and sensitive to matching certain topics to certain modalities. Teaching, facilitating, presenting, and coaching are uniquely powerful when they are delivered in-person and in community. Online learning cannot replace the power of being together in-person, but good teaching can foster similar connections online. Both matter, and need to be designed and delivered to meet the needs, contexts, and capacities of both the presenter and learner.

And Lastly, We Are Also Learners.

Many of you may have edits, adds, and your own sophistication when it comes to online learning. While this guide holds some content that is most likely going to remain true (e.g. foundations of good pedagogy), some content may need to change with technology innovations (e.g. platforms, modalities, ways to use software, and even web links). We encourage you to use this guide as just that: a guide to make your own to most support the presenters, facilitators, and learners.

¹The Pacific Southwest MHTTC (PS MHTTC) serves the priorities of SAMHSA Region 9 states and territories, including: Arizona, California, Hawaii, Nevada, and U.S. Pacific Islands of American Samoa, Guam, Marshall Islands, Northern Mariana Islands, Federated States of Micronesia, and Palau. We offer a collaborative MHTTC model in order to provide training, technical assistance (TTA), and resource dissemination that supports the mental health workforce to adopt and effectively implement evidence-based practices (EBPs) across the mental health continuum of care. The Pacific Southwest MHTTC also provides TTA and resources at a national level with a specialty area focused on youth and young adults of transition age.

²Note that our PS MHTTC, the National Coordinating Office, and other MHTTCs will be issuing school and mental telehealth specific webinars, guidance, and resources. Please go to our website at <https://mhttcnetwork.org/centers/pacific-south-west-mhttc/home> for updated telesupport and mental health resources.



Section 1: Technology Guidance

We start with technology as that is the first gateway to successful virtual learning: the how guides the what guides the why.

Top 5 Virtual Learning Technology Tips

1. *Create guides with visuals to the platforms you use. They'll come in handy when you send out an invitation, start a virtual learning experience, and will help codify the "how tos."*
2. *Don't assume anything: make everything explicit, even the small stuff.*
3. *Technology can make even the most confident feel incompetent, and/or frustrated. Be ready to navigate these feelings in yourself and others.*
4. *Age doesn't mean anything: someone being "young" or "old" doesn't have anything to do with participant capacity in leading or absorbing learning via a virtual platform.*
5. *Digital equity is foundational: don't assume everyone has wifi, hotspots, or a safe and quiet place to learn or teach. Differentiate access to learning as much as possible by determining and mitigating limitations that individual participants may have, and structure the learning to maximize and leverage the skills and contributions each participant brings to the virtual learning space.*

Platforms for Peer Learning - A Checklist

_____ **Research and/or identify the platforms** that your organization will use. There are many low-cost and free conferencing tools that are available to support the transition from in-person to remote learning. Below is a partial list of platforms that can support peer-learning:

- | | | |
|-------------|-------------------|-------------------------------|
| • Join.me | • Adobe Connect | • Microsoft Teams |
| • Zoom.us | • Cisco Webex | • GoToWebinar/
GoToMeeting |
| • Skype | • Google Hangouts | |
| • Appear.in | Teams | |

_____ **Create internal guidance for digital peer learning.** [The Center for Applied Research Solutions](#) created this internal agency guidance for digital peer learning that includes overviews for using online discussion and collaboration forums, web-based live streaming, Twitter Chats, and Facebook Live.

_____ **Develop cheat sheets for each platform** that your organization uses.

- The Center for Applied Research Solutions created cheat sheets ([GOTOMEETING Cheat Sheet](#) & [Adobe Connect Cheat Sheet](#)) that go out to presenters before the webinar to familiarize presenters to the platform (note that there is usually a walkthrough before every webinar to rehearse both the technology navigation and content delivery). The cheat sheet includes visual demonstration of the platform, responsibilities of the presenter, the host, and the facilitator, and includes the software and hardware requirements to run Adobe Connect.
- Many platforms offer their own cheat sheets. It's helpful to review what the platform offers and then adapt it to your own organization's and participants' needs (e.g. [ZOOM cheat sheet](#) from Stanford; [Tutorials from Zoom re how to host a meeting](#))
 - [Lumos Transforms](#) begins their Zoom sessions by guiding users through [a PowerPoint deck](#) that explicitly shows participants where and how to use each function of Zoom as a participant (chat box, renaming, virtual background, etc).
 - This [Zoom Tip Sheet for Educators](#) is designed for teachers who are now leading instruction with K-12 students virtually; many of the tips can easily be adapted to an adult learning audience.
 - [New to Zoom? Here are some tips and trick](#) provides great, digestible go tos for presenters and facilitators.

_____ **Select the Platform** that best matches your learning outcomes (see Section 2).



Physical Set Up - A Checklist³

The physical set-up helps create a space that communicates the presence of the presenter or facilitator to the participants.

LIGHTING

- Good quality lighting makes a difference and allows participants to see you clearly.
- Set up at least two light sources pointing at your face.
- Avoid being backlit. If there are windows behind you, close the blinds/ shades that can create shadows across your face.

CAMERA ANGLE

- Correct camera framing and angle help participants feel like you are speaking directly to them.
- Position the webcam at eye level.
- Position the webcam at a distance that will show your head and shoulders. You don't want your whole face to take up the video, nor do you want to be so far that you cannot be seen clearly.

BACKGROUND

Don't forget the space behind you.

- Consider a background that helps with "legitimacy" and is not distracting.
- Set up a wall with simple art or sit in a space with a bookshelf behind you.
- Some platforms (e.g., Zoom) offer virtual backgrounds that can help.

FOREGROUND

Don't forget the space in front of you.

- What might distract you as a presenter?
- What might you need in front of you to encourage you, keep you regulated and energized?
- Do you need to have a closed door?
- Let others in your shared space know that you cannot be disturbed for a period of time.

ATTIRE

- Your presentation and attire influence nonverbal communication.
- Dress professionally, but be comfortable.
- Avoid busy patterns, such as stripes or polka dots.

MEMORY AIDS

- Have your notes readily accessible.
- You can tape talking points near your webcam, on a bookstand, or have your notes on the screen. This will help you maintain eye contact with the webcam, rather than looking down at notes.

OTHER SUPPORT

- Have other key essentials within reach, like a glass of water, reading glasses, tissue, etc. If your phone is near you, make sure that your phone is also in silent mode.

³Adapted from Hibber, Garber, Kerr, Marquart (2016) The Human Element: Fostering Instructor Presence through Online Instructional Videos. In Creating Teacher Immediacy in Online Learning Environments. Ed D'Agustino, S.

Technology Set up - A Checklist^{4,5,6}

_____ **Test your computer speaker and microphone.** All programs allow the user to test their internal speakers and internal microphone prior to joining a session. Make sure that you can both hear the audio and be heard.

_____ **Choose the audio conference option** that will give you the best connection: phone call or computer audio. If your computer audio is not stable or your internet connection is slow, choose the phone call option.

_____ **Prioritize using a headset mic.** The quality of sound is always better with a headset mic, which helps reduce background noise and prevents an echo. Use a headset mic or ear buds whether you are joining by computer audio or phone call.

_____ **Make sure to have a stable internet connection.** A slow connection will affect the session with frozen screens and inconsistent audio, or, even worse, a dropped connection.

- If using a laptop, use a LAN cable to ensure a stable connection.
- If you have to rely on wifi and/or the connection is bad, consider temporarily turning off your video stream and only maintaining the audio stream. Sometimes, running the web camera on your computer will use up bandwidth in a way that might make communication challenging. Turning off the video should improve communication quality and consistency.
- Turn off other programs requiring access to the internet if your internal connection bandwidth is limited.

_____ **Turn off notifications on all of your apps and phone.** Or better yet, just quit all unnecessary programs on your computer. There is nothing worse than sharing your screen and having a personal text alert pop up on your screen.

_____ **Be acquainted with the video conference features.** The presenter and participants should be acquainted with the various tools and features of the platform (hint: check out the cheat sheets above for tips).

- **Sound.** Learn how to mute and unmute the microphone. Some platforms have shortcuts (e.g., in Zoom, you can press and hold the spacebar to temporarily unmute yourself). You can automatically mute yourself and have your video off before joining (particularly for Zoom). This gives you time to ensure you are sitting where and how you want to be when joining a meeting, and sets the default as “mute.” To set this up, see [How do I turn my microphone and video off when joining a Zoom meeting?](#)
- **Display name on screen.** If the organization uses a general account, sometimes your name may show up as the organization name. Once you log onto the platform, you can [change your screen name](#).
- **Chat feature.** The chat feature is a useful way to share messages, videos, files, screenshots. Depending on the platform, chats can be sent to the entire audience, individual participants, presenters, and/or organizers.
- **Polling.** Most platforms offer polling as a way to gather collective input from participants. If polling is not available, there are other options such as Poll Everywhere, + 1 Polling, Google Doc, and or a simple thumbs up sign if participants are also on video.

_____ **Be intentional about what is on the screen.** (i.e., your virtual real estate). What do you need your audience to be focused on? Is it what you are sharing (e.g., powerpoint, image, document) or the faces of other participants? Remember to stop sharing your screen if the information is not necessary for the discussion.

_____ **Prepare for potential hackers, aka “Zoombombing”** A recent trend that many Zoom users are experiencing is a phenomenon called “Zoombombing,” when a Zoom learning space gets hijacked and someone unwarranted and unwanted takes over the audio and video controls to share their screen and show what inappropriate materials and audio. The following resources were created to help prevent [Zoombombing from happening: Zoombombing Resources | Keep Teaching | USC. 6 Tips to Deter Zoom-bombers](#) by Michelle Pacansky-Brock, and the company Zoom released [preventative tips](#) to prevent “party crashers,” too⁷.

⁴Adapted from [Teaching Effectively During Times of Disruption](#)

⁵Adapted from Hibber, Garber, Kerr, Marquart (2016) The Human Element: Fostering Instructor Presence through Online Instructional Videos. In Creating Teacher Immediacy in Online Learning Environments. Ed D’Agustino, S.

⁶Based on a webinar on online learning facilitation from Adi Hanash, an online learning specialist (3/18/2020)

⁷Note that the content of Zoombombing tends to be racist, xenophobic, homophobic hate speech. As a facilitator, once you interrupt the Zoombomber and mute all and dismiss the user, you may need to offer a breath or ask participants if they want to resume to ensure everyone’s emotional safety

Technology Instructions for Participants

Mute and video dynamics are everything. Mute and video issues will make or break a learning experience.

- **If it is a group of more than 10 people** who are not accustomed to Zoom or virtual learning, we suggest automatically muting people as the Host, asking people to “raise their hands” (either literally or use the “raise hand” function in the participant box) to indicate they want to speak, and having the host manually unmute them.
- **Advise participants to mute their microphones if they are not speaking and unmute the microphones when they wish to speak.** Participants may be joining calls from all kinds of different locations, many of which may create background noise. Encourage participants to mute themselves if they’re not speaking to minimize unnecessary or distracting background noise. Using the “raise hand” feature or simply seeing the microphone unmuted will give the group a visual cue for when someone wishes to speak.

A FEW MORE TIPS...

- **The best solutions aren’t always technical ones.** If you want to use Flipchart, use Flipchart! If you need a quick response from participants, ask for a thumbs up or thumbs down. If you see participants’ interest wane, ask a silly question or invite participants to stand up and sit down to stretch their legs.
- **Breathe though it.** Teaching and technology are ripe for blunders, mistakes, and challenges. Give yourself grace. If you as a presenter breathe through it, participants are likely to be less bothered and stressed.

Reflection Question

» *Knowing that many mental health and school mental health professionals may be new to virtual learning, what technology navigation tips are essential to both the presenter and learner’s success?*



Section 2: Virtual Facilitation Strategies & Choices

Once you are familiar with strategies to support the set up of physical space and technology, it is important to consider additional processes and structures that set the facilitator up for success.

The following are tips that merge foundational facilitation practices for navigating virtual learning platforms.

Part 1: Setting the Facilitator Up for Success

Teams = Success. If possible, it's ideal to have a host, facilitator, and presenter.

- **Host.** The host is the person who is monitoring the technology, the person to whom participants can send email or chat regarding technology issues, and the person who mutes and unmutes participants experiencing significant background noise. The host can also help with recording.
- **Facilitator.** The facilitator is the person who is online 15 minutes before the session, greeting guests, liaising the host and presenter, and usually introducing and closing the learning. This person can help presenters with time checks; monitor the chat box for questions and comments; and add resources during the presentation.
- **Presenter(s).** The presenter is the person or people delivering content and facilitating the learning experience.

Sometimes the host, the facilitator, and the presenter role gets combined (this happens frequently). When possible, we highly recommend providing a team approach to webinar/workshop presentations/training, or facilitation, especially when hosting large groups.

Note that [Teaching Effectively During Times of Disruption](#) suggests that if having a host is not possible for larger sessions, you can pre-identify a colleague or participant to moderate the chat and make sure important questions and comments are addressed. Even for smaller sessions, it may be worthwhile to ask a participant (or two) to take on special roles as “chat monitors” to voice if there are questions that arise that the facilitator has missed.

Part 2: Ensuring Accessibility

Designing for accessibility is fundamental and necessary.

Help ease invitations if participants are from multiple time zones by using apps like [Everytimezone](#) to check your proposed meeting time in every time zone.

The [National Center on Accessible Educational Materials](#) offers the following mandates for full accessibility: videos must have closed captioning and audio must have transcripts. Here are some resources for live captioning (for participants that may be deaf and hard of hearing):

- [CART](#) (Communication Access Realtime Translation) is a service in which a certified CART provider listens to speech and instantaneously translates all the speech to text. Display options include computers, projection screens, monitors, or mobile devices. The real time text may be displayed as a full screen of large text at the front of the room or the text may be incorporated onto the same screen as a PowerPoint presentation.
- [Amara--an award-winning subtitle editor and enterprise offering](#)--enables you to caption and subtitle any video for free; for larger subtitling projects, the platform makes it easy to manage teams of translators)

When using Zoom, you can utilize the chat function to support deaf and hard of hearing participants. The whole “room,” including facilitators and participants, can engage in a real-time, text-based instant messaging. Messages received in Chat remain archived and will appear in the archived transcript. This can be a nice way for instructors and students/participants to communicate nimbly without needing to use voice-based chat and without needing to use any outside apps or resources.

- **Automatic live captioning is not available in Zoom; however, automatic captions are visible if you record a Zoom session.** You may wish to use **Google Slides** and enable the **live captioning feature within Google Slides**. If you share your screen using Google Slides, your voice will be captured and live captions will appear. See [Present Slides with Captions \(via Google Drive support\)](#) for more information.
- **For participants who are blind or have low visibility, narrate the material that you're displaying visually on the screen.** Just as you might read materials aloud in class, read screen material that you share on-screen just in case



students are not able to see essential text (this is also pertinent when participants cannot see the presentation - no access, poor connections, etc).

Often, and especially for federal or state-funded learning, the content must be 508 compliant. Check [out this link](#) for more information.

Reflection Questions

- » *What presenter tips require practice for you?*
- » *For which presenter tips do you need more information or skill support?*

Part 3: Purpose Drives Platform - Matching Your Learning Outcomes to The Learning Modality and the Technology

Platforms shouldn't drive the learning; the learning outcomes should drive the choice of platform. The following section explores options the facilitator has when designing a virtual learning experience.

The Four Modalities of Engagement

Whether online or in-person, pedagogy and learning usually fall under four modalities: facilitation, keynotes/presentations, coaching and/or consulting, and workshops. Note that "Virtual Learning" does not equal "Meetings" - they have different purposes, outcomes, and approaches.

Quick Tips

[AWAKEN](#) notes, "not all virtual programs are created equal," and offers the following considerations when designing a virtual learning program:

Webinar vs. Workshop: Are you looking for a short, lecture-based webinar format education that is scalable or an immersive, interactive workshop that involves audience participation?

Lecture vs. Dialogue: Is your top priority finding the most efficient way to deliver information or is it engaging your team to learn while having open dialogues?

On-demand vs. Live: Do you want a self-paced, pre-recorded, click-through on-demand education solution? Or do you want a live-facilitated, small group learning experience?





FACILITATION

Participants are usually part of an affinity group (a grant, a work position, an identity position) and the facilitator's job is to:

- a. Open the session (welcome, purpose, outcomes, introductions, connector, norms)
- b. Provide guiding questions to bridge and build discourse between and across participants or between participants and a presenter
- c. Close with summary and organization of the conversation, next steps, thank yous, and close out

Note that as a facilitator, your voice should be the least heard except for the opening and closing. Your job is to set participants up for engagement.



KEYNOTES/PRESENTATION

Participants are usually joining to gain knowledge and information and the presenter's job is to provide content and direct instruction. These usually take the form of a webinar. See *Designing Interactive Webinars* for more tips about webinar engagement.



COACHING & CONSULTING

Participant(s) are joining to receive individualized, intensive support on a practice, skill, dilemma, or inquiry. This could also include collaboration, in which the coach/consultant works on a document (e.g. a school's trauma-informed policy), or with a team or individual.

- a. Coaching implies that the participant is engaged in thought-partnership; the coach assumes that the participant has the solution to their own challenge and the coach provides reflective guidance. See Costa & Garmston (2002)'s guidance for coaching questions. This model is suitable for on-going interactions.
- b. Consulting implies that the participant is seeking concrete advice, solutions, or an answer to a particular question. Consulting is usually a one-time, short-term interaction.



WORKSHOPS

While workshops are recommended for in-person, virtual workshops (usually recommended for 60-90 minutes) can be effective, though this is the most difficult form of virtual learning. We recommend that you lead a virtual workshop with a co-trainer.

For other ideas of how workshops flourish online and other platforms that support success, see: [Remote workshops: collaboration done virtually](#) or [Running a Virtual Workshop - Ashley Crutcher](#)



Matching Platform to Modality to Purpose; What To Use for What and with What

The following is a sample of a chart created for a team to help select which platforms and modalities to use for various outcomes. Please note that the opinions in the chart reflect team members' feedback; when creating your own organization's guide, you and your team members may have different experiences, opinions and preferences.



Adobe Connect

MODALITY

Webinars (panels, presentations)

PURPOSE/FEATURES

Presentations, chat box, screen share, easy for multiple presenters to access, webcam usage, uploading handouts

PROS

- Intuitive for new users
- High quality video streaming for presenters
- No longer a requirement for you to use Adobe Flash Player
- As a presenter, there are separate chat functions for participants and presenters
- The host has meeting controls (presenter can mute others)
- Supports up to 500 participants at once

CONS

- Usually requires the use of a technology host

Zoom

MODALITY

Discussion Hours, meetings, coaching and consulting, small group workshops Webinars (panels, presentations, breakout rooms)

PURPOSE/FEATURES

Coaching or consulting for groups of 10 or fewer, meetings

PROS

- Screen sharing
- Easy calendar invite abilities with Outlook
- Useful for brainstorming sessions with Zoom's on-screen [whiteboard feature](#)
- Start using for free ([Zoom's free plan](#) lets you host up to 100 participants in a video call) Zoom's pro plan supports Breakout Rooms to help participants talk in smaller groups
- See [Managing Video Breakout Rooms](#).

CONS

- Unpredictable video quality (pixelation)
- One chat box can be confusing or lead to errors (the facilitator and participants have to be keenly aware of when they are sending a message to the whole participant list, to the presenters, or one particular person).

RingCentral®

MODALITY

Facilitation, presentation, coaching, consulting, group meetings

PURPOSE/FEATURES

Video conferencing, recording available, chat, whiteboards, meetings on your schedule, up to 200 participants

PROS

- Each staff person has their own line
- RingCentral Meetings' video conferencing feature is powered by Zoom and is essentially identical
- Video conferences, share screens, exchange files
- Lets users join in by phone

CONS

- Unpredictable video quality (pixelation)
- One chat box can be confusing or lead to errors (the facilitator and participants have to be keenly aware of when they are sending a message to the whole participant list, to the presenters, or one particular person).



MODALITY

Collaboration (workshops), meetings, calls

PURPOSE/FEATURES

Coaching or consulting for groups of 10 or less, meetings

PROS

- Skype For Business will soon become a part of Microsoft Teams
- It has been around for many years, which may increase participants' familiarity with it.

CONS

- Group calls are free, but you can only meet with up to 10 people
- No meeting controls (you can't mute a noisy participant).



The platform chart on the previous page is a sample of one agency's internal guide. You may also consider: Google classrooms, O365 Teams, Go To Meeting, Joinme, Appear In, and more. Facebook Live and Instagram Live are examples of utilizing social media platforms for virtual learning; see below for pointers.

Facebook Live Tips:

- **Generating interest** before you go live is key so you let your viewers know when to tune in, and what key messages you'll be sharing. Think of this like a campaign: the more you market beforehand, the better the turnout.
- **Create a virtual flyer** 1-2 sentence description, engaging photo, and remind folks the date and time.
- **Tag/call out other organizations** that you may be addressing, or hoping will join when you go Live (e.g., "Hey @nonprofit we'll be discussing [#topic] and hope you'll join the conversation!").
- Since Facebook Live let's you target certain events and groups with your promotions, it's ideal to have more focused content. **Identify 2-3 key takeaways** and guide the conversation around those points.
- You can record your Facebook live either horizontally, or vertically, so **pick which visual composition** makes the most sense given your scenario.
- **Timing is key.** Determine when your audience will be online and more likely to engage. You can check Facebook Insights data, and think about real-life scenarios (e.g., after school, or after work)
- Facebook Live viewers can join at any time, so be sure to **continuously offer context throughout the viewing.** For example, "Hey, if you're just joining us, welcome to our broadcast. We're currently talking about [topic] and we've just covered [previous topic]."
- A powerful way to increase engagement online is to **address comments that appear live on air.** This builds a culture of sharing, engagement, and responding to them in real-time encourages others to ask questions.
- After your Facebook Live concludes, **check out your analytics.** Checking the "Peak Concurrent Viewers" is the metric that represents the highest number of concurrent viewers watching the video while it was live.

Facebook LIVE with CARS!

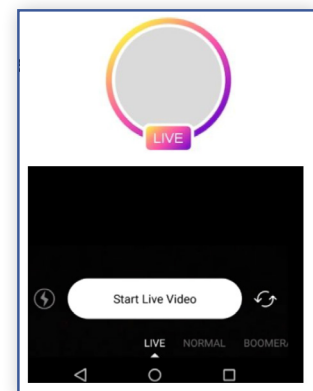


Join us LIVE on Facebook as experts talk about mental health advocacy, and share tips and tricks for you when talking with your local politicians!

Facebook.com/CARS

Instagram Live Tips:

- To start an Instagram Live, **click on your Story profile photo and toggle over to the "Live" camera setting.**
- Once you go Live, your friends and followers who are online, will receive a notification that says, "[Username] has started a live video"
- While you're streaming live, you'll be able to **receive comments that both you and users can view.**
- To end the Live broadcast, tap the top right corner. You can **choose to save the video file in your camera roll, or share it to your Instagram Story** (Note: comments and reactions won't be saved)



Project Management. Note that this section does not include collaboration (project management) platforms. You can create the same guidance to those platforms as you would for virtual learning. For example, the Center for Applied Research Solutions [created this menu of available online discussion and collaboration platforms](#). The menu covers the following: Google Group, Slack, Asana, Basecamp (see this CARS-created [deck on using Basecamp](#)), Bitrix, Dropbox, Yammer, Wizehive, Group Rocket, Clinked, Social Hubsite, and Groupspaces.

Reflection Questions

- » *Which platforms does your organization have access to? What's missing? What should you keep?*
- » *How might you make this chart reflective of your own organization's usage and availability?*
- » *When putting the chart together, how might you do so with input from both presenters, participants, and technology staff?*
- » *How might you integrate social media platforms in the chart? What platforms do your populations of focus use?*
- » *What other tips do colleagues need in selecting their modality?*



Section 3: Content Guidance for Content Creators⁸

Some of us create content for ourselves to present. Some of us hire or partner with external presenters. Just like having norms to guide a virtual learning session is essential, so too is having guidelines for content creation to ensure fidelity to the values, principles, and audience for your project or your organization.

The guidance below was written for a federal project focused on education, mental health, and youth of transition age. You can adapt your content guidance to the context of your current project and/or audience.

Creating Content for Webinars and/or Presentations

The presenter should ensure that the content and format is inclusive, respectful, and serving diverse perspectives.

The following is a sample of guidelines employed by the PS MHTTC when contracting with external presenters; these are sent to all contractors before any engagement.

- The webinar/presentation will include a few slides at the beginning introducing [the initiative] and the technology tools that the participants will use.
- Start the presentation with some material about the “why” of the topic (Why are we here? Is it in response to a big event, or does it align with a project goal?)
- Use examples that connect to the work lives of the participants as much as possible.
- Focus on **practical, in-depth, useful, “how to” information**, not the history or excessive detail about the particular program, system, or approach. Participants usually want strategies, knowledge, and skills that they can apply. Focus not only on successes but also on barriers and how these were overcome, and on problems encountered and solutions attempted.
- We recommend presenters end the presentation with the “top ten takeaways” or lessons learned.
- **Avoid lengthy presentations** and avoid having presenters rush through material or try to cover too much information in too short a time period. This detracts from the learning potential of the presentation.
- **Bring an equity lens.** Incorporate information and perspectives related to serving **culturally and linguistically diverse populations**, achieving cultural and linguistic competence, and reducing disparities into presentations.
- Make sure to provide clarification of any acronyms or other professional language that may not be widely understood. It is best to avoid using acronyms or abbreviations.
- **Keep slides simple** with limited text.
- Graphics are encouraged and should be identified within copyright limitations (i.e., use images from a stock library). Any copyrighted materials such as scales or tools cannot be included without the consent of the copyright holder.
- Any photos, quotes, and related information provided by a youth, young adults, or family members cannot be included without written consent or must be de-identified.
- Recognize that all notes and other materials included within the presentation will be visible to reviewers, so they should be customized for this particular presentation and clear to the reader.
- Remove any material in the presentation that is not directly relevant to this particular presentation, including old notes or other material that will not be used in this presentation.
- View **Applying Multimedia Learning Principles to Presentations** online at <https://cars.bitrix24.com/~RuTWS> for 12 evidence-based principles that should guide the design and organization of multimedia presentations.

Reflection Questions

- » *How might you create, adapt or adopt content guidelines for internal and external presenters?*
- » *How might these guidelines reflect your principles and values?*

⁸Adapted from Springmeyer & Oshel for CARS, 2017









Leading Trauma-Informed⁹ Virtual Learning

Many of the practices on the previous page in the content guidance section reflect trauma-informed principles, values that are designed to ensure everyone's safety, wellbeing, and optimal ability to engage and reflect in the learning. Trauma-informed principles such as safety, transparency, peer support, empowerment, and cultural competence and humility can and should inform guidelines for presenters and content creators.

Virtual learning spaces can heighten vulnerability- no matter the content- because people are in uncontained spaces; the facilitator has a limited ability to read how the conversation is landing with participants; and there is unpredictable access to follow-up when someone is activated. Unfortunately, there isn't a lot of work yet that explicitly guides the intersection between trauma-informed teaching and virtual learning (though there is this good 2016 article: [Virtual Academic Challenges To Real-Time Trauma](#)).

Fortunately, many teachers, instructors and facilitators model trauma-informed virtual pedagogy. For example, in a recent webinar on trauma-informed pedagogy, presenter Alex Shevrin-Venet (www.unconditionallearning.org) first briefly introduced participants to the Zoom platform, invited participants to check in with themselves (taking a breath, rolling shoulders stretching) and mirrored the invitation herself. *Participants' regulation was prioritized*. Next, Shevrin-Venet asked all participants to get connected by entering something that was positive and challenging in their lives in the moment. *Participants' connection was ensured*. Then, Shevrin-Venet offered one norm "Take what you need" and closed the opening with assuring participants that the only visuals participants would see would be stock photos of nature; no explicit graphic or triggering content would be offered. *Participants' safety was explicitly named* so that the learning could begin.

As such, we suggest the following basic parameters:

-  **Do offer activation warnings** at the onset of the learning (e.g. "I want to forecast that we will be discussing suicide during this time. You may opt out or mute for the next ten minutes").
-  **Do not use case studies or stories that involve explicit harm**
-  **Do offer moments of quiet, breath, or regulation** throughout a virtual learning space that may be emotionally charged (even if it is subject-driven, it can still be emotional)
-  **Do not use images or video that graphically illustrate harm or violence**
-  **Do offer concrete ways for participants to access healing modalities** if the topic is potentially emotionally activating
-  **Do not post pictures of your Zoom of virtual learning space online**, especially if the picture shows the faces of students (who may not have granted permission) or participants'- in no way do you want to potentially violate the school's obligations under FERPA or other student privacy laws

The following are two examples of guidelines that reflect the audience and outcomes of federally funded projects.

EXAMPLE A: Cultural Competence (A Trauma-Informed Principle) In Content Guidance

1. Share your lens and biases (historical, social, political, racial, etc) and acknowledge your limitation as it relates to the content you are presenting. For example, if you are presenting on historical trauma in Cambodian-American communities, and if the presenter identifies and is identified as someone who is not from a Cambodian-American community, name and acknowledge that position.
2. Use language that is respectful of culturally and linguistically diverse communities, and always use first person terminology (e.g. "students who identify as queer" vs "LGBT students").
3. Incorporate the perspectives of family members and youth of culturally and linguistically diverse backgrounds into sessions.
4. Incorporate information and perspectives that support cultural and linguistic competence, equity, and eliminating disparities in mental health care, including access, utilization, appropriateness, and outcomes of services and supports.

⁹Note that when using the term "trauma-informed," we are using it to reference the approach (design & delivery) of virtual learning. It is not exclusive to content that may be about trauma or mental health. Trauma-informed virtual learning pedagogy can be employed for any audience and any content, and especially when in the context of school or mental health related learning.

5. Use the terminology communities identify with to describe their group membership. For example, for persons of “Asian” ancestry, use the specific ethnic group(s) identity term to the extent possible; avoid gendered terms whenever possible. “Congressperson” is always better than “congressman” or “congresswoman.”
6. When providing demographic and statistical information, share disaggregated data and the data collection methodologies, noting limitations, whenever possible.

EXAMPLE B: *Collaboration & Mutuality (A Trauma-Informed Principle) in Content Guidance*

The following is a sample of guidance given to presenters creating content for a project that specifically addresses youth and family engagement and mental health. While this language is specific to the project, it is also good practice for other populations and presentations.

1. Acknowledge the level of family and youth involvement and partnership in the work you are presenting. Provide examples of how families and youth are included as full partners in your work to achieve family-driven and youth-guided services and systems and how barriers might be overcome.
2. Use language that is respectful of families and youth and of their roles as equal partners in activities and interventions.
3. Avoid any language that could be misunderstood as blaming or degrading, e.g., “dysfunctional families.”
4. Use terms such as youth, young person/people, young adult(s), youth advocate(s), advocate(s) for youth, and do not use kid(s) or youths, plural.
5. Use terms such as “family member” or “care provider” instead of “mom or dad” to interrupt heteronormativity and other assumptions about family structures.

Reflection Questions

» *How might you create trauma-informed and culturally competent virtual learning guidelines for presenters so that your learning spaces are safe and supportive regardless of the content’s topic?*

» *How might you create trauma-informed and culturally competent virtual learning guidelines for presenters so that your learning spaces are safe and supportive, especially if the topic is on issues related to crisis, mental health, trauma, or other potentially distressing topics?*

» *If you are presenting content that might activate a participant, how can you provide the pre-, during, and post-supports to optimize regulation?*



Section 4: Facilitation Guidance

Welcome to facilitating virtually! This section covers the sticky stuff: the art and craft of facilitating generally and through virtual learning platforms. [Virtual learning is a special skill](#). Here are some tips from our internal trainers and external experts in the form of a checklist to help your facilitation maximize.

Prepare well.

- Set up your space: water, back up plugs for your computer, phone, etc. Ensure that if you are on video, preview what participants will see behind you (see Section 1).
- Choose which platform and tools to use (see Section 2).
- Practice and do a content run AND a technology run through. Even if you think you're comfortable with the content and the platform, do it. It never hurts.
- Take a moment to ground: facilitating or presenting virtually can be extremely vulnerable. It's hard to gauge learning; there are many elements out of your control (no matter how well you prepare); and all of that can create anxiety or other feelings that might block your ability to present smoothly.
- Take a moment to debrief, and choose how you want to debrief: you might need a walk, you might need to have a call immediately after facilitating with a colleague or participant to get direct feedback, or other. Choose the way you want and can regulate to transition to the next part of your day.

Plan learning time intentionally. It can be hard on the eyes to look at a screen for long periods of time, and hard on the learner to sit and watch both the presenter and often themselves as well. Just as one would do for an in-person learning experience, and even more important when virtual, create a learning experience that is time sensitive, bound, and attuned.

- Break up any conversation flow into 15-20 minute segments¹⁰. Adi Hanish's rule is to not go more than 5 minutes without asking participants to do something.
- If you are providing content, pause and provide time for participants to make meaning of their learning (chat box reflections, polls, etc).
- If there is a panel or segments of the presentation, pause between presenters and ask participants to share (again, by chat box usually) one learning, takeaway, or "ah ha."
- If there is a co-facilitator, designate one of you to code the themes of participant input (e.g. "Many of you are writing about leadership challenges"). The colleague could also take participant chat box input and make it into a word cloud and then send it to the prime presenter to share out at the end to create reflective facilitation.
- Be kind to yourself and to learners with the time of virtual learning. We do not recommend more than 90 minutes.

How will it go? Flow matters. In any format, there should always be an opening (technology platform review, welcome, norms, objectives, and agenda), middle (content + questions and answers), and close (next steps, thank yous, and, if applicable, feedback forms or surveys).

Note that you can choose how to utilize the chat box as a presenter. Hanish encourages presenters to not get distracted by the chat box, but to teach and then move to the chat box.

For example, you can explicitly note when as a presenter or facilitator you will be pausing for questions and responses (e.g. "I will be pausing every 15 minutes or so to review and respond to questions" or "I will respond to questions at the very end of the learning session" or "the chat box is for you; I will not be responding to your questions but encourage participants to do so." Hanish reminds us that just like a presenter wouldn't stop mid sentence during a training to respond to a hand, the same goes for virtual: you can choose when and how you want to respond, as long as you communicate that to participants.

Is instruction diversified? Plan pedagogy intentionally. Offer multiple ways of learning: text study, multimedia¹¹, examining images, etc. (if appropriate for time, audience, and learning outcomes). Diversify instruction! Offer case studies and open ended activities (again, only if appropriate).

Are you ready? Presenter energy = participant energy. Virtual learning requires at least 10% extra "umph" to keep participants engaged and interested. Vocal intonation is crucial. Speak slowly but with diversified patterns, engage in humor (if appropriate), speak with warmth (always appropriate), and repeat lines that you want participants to hear and internalize. A special note for hosting: virtual hosting is just like hosting a dinner party in your home. Identify who is going to be welcoming people (so that you avoid having multiple people sitting in silence waiting). Welcome people as they enter, greet with energy and connect participants to one another.

¹⁰As Howspace notes in *How to Facilitate a Virtual Workshop*, "at live workshops, facilitators are usually good at proceeding one thing at a time. In virtual workshops, however, we tend to provide all of the information at once. Breaking things down into manageable parts is also a good idea in digital workshops. Make use of limited-scope questions and multiple-choice polls to ensure rapid responses."

¹¹ See either Section 1 (Technology Guidance) or go to each platform's site to learn about their backend suggestions for loading up video files and playing them for participants

_____ **How will you relate? Establish connection:** With any learning experience, creating and cultivating relationships in the virtual learning space is foundational. And even more so in the virtual learning space. As Adi Hanish reminds us, it's essential to establish connection with the individuals in your session. Reflect what responses you see put in the chat box (e.g. "Heliana is mentioning that one of her leadership challenges is xyz. That resonates with what Christina is also putting in the chat box."). Hanish also notes that if you ask people to do something, but don't acknowledge that they did it, you'll lose them. If you ask people to put their name, role, and organization in the chat box, verbally welcome them and thank them for doing so.

_____ **Are you fostering a warm virtual environment? Names matter.** Mention names as much as possible (e.g. "I see that Leora is writing that she recommends X in the chat box"). Make connections between participants, even in the chat box (e.g. "Christina and Leora are both bringing up questions about how to define school safety") or, even better, encourage participants to resource one another (e.g. "Leora, I see that Christina is offering youth engagement best practices. Perhaps the two of you could exchange information in a 1:1 chat and connect offline").

_____ **Are you setting learners up for successful engagement? Be specific when you ask a question of participants or have a request.**

- This includes the mode of response (e.g. are you going to call on one person? Two people? Say so); how much time participants have to respond; and where are you expecting participants to put their answers. In the chat box? Unmuting?
- This includes, is possible per platform, what you suggest for the view (e.g. if on Zoom, do you want participants in gallery view so they can see colleagues, or on in speaker mode so they are only looking at the presenter, or minimized so that they don't get distracted by looking at themselves?)

_____ **Are you setting yourself up for your role? Establish roles.** We have already discussed that on webinars, it's helpful to have a host and facilitator in addition to presenters. In presentations, who is taking notes (e.g. recorder)? Who is the backup presenter in case the primary presenter's technology crashes?

_____ **Do you have working agreements in place? Establish norms for the virtual learning space.** Even if you've worked together for years, norms help people in various settings, places, and circumstances settle into shared working agreements and expectations for the session (hint: this also helps reduce anxiety). **See the box to the right and below for sample norms.**

Note that we highly recommend checking for agreement with norms. While you may want everyone on video, that may not be the most equitable or safe option for some people¹². While you may want all participants to avoid multitasking, that may not be possible for reasons beyond your or your participants' control.

GROUP NORMS

For Better Remote Meetings

ONE REMOTE, ALL REMOTE.

If even one participant can't be there IRL, everyone joins from their own device to endure everyone's ability to participate fully.

PLUG IN AND STAY PUT.

Find a quiet spot with reliable internet from which to participate. Plug in chargers and headphones if possible.

CAMERAS ON.

Show up and engaged, just as you would in an in-person meeting.

HIT RECORD.

Record meetings for folks who can't attend, have technical difficulties, or just want to review portions of the agenda later.

USE A PARKING LOT.

Post questions for presenters to the chat, trust that they will be addressed at regular intervals throughout the presentation.

ONE MIC.

Mute when you're not speaking to reduce background noise. For large groups, raise your hand when on video to indicate you'd like to speak.

@openclssrm

¹² Brene Brown offers: "Do not assume every student has the same attention span, the same level of wi-fi, access to private space, and the same number of supportive people in their homes. I teach grad students who have to use their phones as hot spots and log-in between jobs or in closets. We have to check our expectations and privilege. We want everyone to be seen and belong."

Sample Norms for Virtual Learning (Meeting focused)

- We will create a “virtual water cooler.” Each [discussion hour] will begin with a check-in, and will include discussion on what’s going well and what’s challenging with [topic]. We will include ideas, resources, and suggestions in the chat box when possible.
- We will expect and accept a lack of closure- we won’t get to everything, but we’ll get to as much as possible.
- We will ask for clarification even more than we usually do: with virtual meetings, communication can be challenging. Not being able to talk things through face-to-face leaves room for misunderstandings. If one of us doesn’t understand a share, we’ll ask a clarifying question.
- We will be patient and respectful with speaking turns and speaking times. During voice calls, it’s not unusual that meeting participants start talking over each other. We agree to give everyone a certain amount of time; in this way, everyone can get more structured when speaking and have equal time.
- We will spell out acronyms and avoid shorthand to ensure cohesive collaboration.
- We will state our name each time we speak to build relationships.
- We will avoid multitasking during this virtual learning space (this can also be re-termed as “name needs”, e.g. “I am on but I have a pressing deadline so I am in listen mode and need to tend to a prioritized ask”)
- Other?

Adapted from:

[Virtual Meetings: How to Hold Meetings as a Remote Team](#)

[Human Capital](#)

[Whitepaper: The Rise of Virtual Meetings](#)

_____ **Are you being kind to yourself?** Brene Brown notes that presenting and facilitating online and virtual learning is the peak activator of collective vulnerability. In her words¹³ (excerpted) about virtual learning:

The bad news: The wheels will fall off. It will NOT go as planned...Neurologically – it’s screen time. Here’s the good news: If you’re someone who is driven to show up for your students and connect, if you’re willing to be a learner, if you’re willing to stay curious, if you’re willing to change course (478 times in one semester or one week), YOU WILL TOTALLY CRUSH IT!

Brene notes that “sometimes it works and sometimes it does not. And, it mostly works if you can be nimble and change course.”

Keep learning. Other links to great virtual learning tips:

- [8 Virtual Facilitation Lessons Learned](#) (Claycomb, 2016)
- [Getting Started with Online Training & Facilitation](#) (Rewa, 2018)
- [Teaching Remotely in Times of Need](#) (Dr. Torrey Trust)
- [The Rise of Virtual Meetings](#) (Michael Wilkinson)
- [10 Ways to Use A Spectogram Online](#)

Reflection Questions

- » As a virtual facilitator or presenter, what are your top three tips that you want or need to practice the most?
- » With whom will you practice?
- » How will you measure your success and celebrate your facilitation growth points?

¹³ [Collective Vulnerability, the FFTs of Online Learning, and the Sacredness of Bored Kids](#)



Section 5: Learner Guidance

Just as we want to ensure our presenters, hosts, and facilitators have an optimal facilitating/presenting/teaching experience, we want to set up our learners for an optimal participant experience. This is often called “priming.” Here are a couple tips to ensure learners come to the virtual room ready, willing, and excited.

Send preparation emails that not only include a calendar reminder, but also are **clear about what kind of technology and interaction you are expecting**:

- Are participants expected to be on video?
- Will you be on video, but participants can be by audio?
- If on video, how can participants ensure that they first are muted and off video when they sign in?

Preparation emails can also include **explicit modality expectations**: if someone is expecting to interact but ends up in listener-only mode, this can be frustrating. The reverse is true: if someone is expecting to be in listener-only mode but ends up being invited to be on video and verbally engage, this can be frustrating. Provide clear pedagogical expectations.

Priming can also include providing 1-2 readings, podcasts, or other webinars for participants to check out before joining the session. Expect that no one will be able to, but provide just in case there are learners who are eager to flatten their learning curve.

Gather pre-learning data. Dr. Trust uses [this check in form](#) with their students to gather pre-learning data regarding how participants are feeling before virtual learning. The form asks about participant access to technology, wifi, etc., and can easily be adapted to meet your audience needs.

Settings matter: Note that many people call in from cubicles and are generally limited with audio contribution (e.g. people may feel hesitant to share via voice on webinars if their environment is not set up for that; chat box is a good alternative).

Virtual learning should always end virtual learning sessions with **what happens next**:

How will people access the recording, if it's recorded?

When might they expect to receive the recording?

If there are notes sent out, how will they be accessed and disseminated?

Always end virtual learning sessions with **resources and references for continued learning**.



Section 6: Resources & Reference for Continued Learning

- [Remote Teaching Tips from Faculty & Staff](#)
- [The Ultimate Guide to Webinars: 37 Tips for Successful Webinars](#)
- [5 TECHNIQUES TO DELIVER AN EFFECTIVE VIRTUAL CLASS](#)
- [Five Pedagogical Practices to Improve Your Online Course](#)
- [Ten Online Teaching Tips You May Not Have Heard](#)
- Open source: "[Remote Teaching Resources for Business Continuity](#)"
- [Collaboration - Online Courses, Classes, Training, Tutorials on Lynda](#)
- [E-learning methodologies A guide for designing and developing e-learning courses](#)
- [IDEO U: Design Thinking Online Courses](#)
- [Tools](#) from Training for Change
- [EdTechTeacher- Innovators in EdTech in the Classroom](#)
- <http://jareddees.com/facebook-live-webinars/>
- [Meeting and Webinar Best Practices and Resources](#) (Zoom)
- [New to Zoom? Here are tips and tricks to make you a pro user](#)
- [Distance Learning: A Gently Curated Collection of Resources for Teachers](#) (Gonzalez, 3/30/2020)

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CHANGEMATRIX

