

Designing and Facilitating Remote Events

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Today, meeting face-to-face has become a challenge. We all need to adapt. But this also means we have an opportunity to improve the way we meet online.

Many tools and tips can be found on the internet. This is a selection of them.

Read this document for tips on designing and facilitating remote events. It's divided into five steps:

- [Step 1 - Define your goals](#)
- [Step 2 - Plan the journey](#)
- [Step 3 - Find your tools](#)
 - [Call platforms](#)
 - [Break-out groups](#)
 - [Polls and interactive tools](#)
 - [Collaborative documents](#)
 - [Shared whiteboards and post-its](#)
 - [Other tools](#)
- [Step 4 - Prepare for the event](#)
- [Step 5 - Run the event](#)

Step 1 - Define your goals

Think about your reasons for getting this group of people together.

Write down what you want to get out of the event. At the end of the event, what things do you want to say you have achieved? If people only remember two things as they leave the event, what should they be?

You can write them in the first tab of this [interactive worksheet](#). You'll be asked if you want to create a copy of the document – click “Make a copy”! This sheet is now your personal worksheet.

Who needs to be there in order to achieve your goals? These questions can help you in defining who you would like to engage in your event and why:

- Why are you bringing people together?
- Why these people in particular? What is particular or different about them?
- What do you want to have done by the end?
- Have you been given any objectives by others (donors, conference organisers) that you need to include?

Test the event goals with the confirmed participants by sending them the event goals, and asking them what they think. There's an example in [your worksheet](#). Sharing the goals will help you to come up with an agenda that resonates with the audience and can spark a feeling of engagement among the participants.

Step 2 - Plan the journey

You've got the goals clear by now. Now it's time to translate these goals into an agenda.

To reach your goals, you need to guide the participants from A to B.

A is the current situation – where you all start from. Maybe you’ve been working on the same programme, but haven’t discussed what your different activities add up to.

B is the place you want to reach together. **What needs to happen to get from A to B?**

Thinking about this now will help you understand what tools you need in Step 3.

Step 3 - Find your tools

Your [interactive worksheet](#) has a list of facilitation tools and tips designed for in-person settings. Some of these will be adaptable to online meetings: others will be harder to adapt. Here are a few online-specific ones:

- [Online energisers](#) from 350.org
- [Mad Tea](#)
- Ideas from [Liberating Structures](#)
- [10 Ways to Use A Spectogram Online](#)
- [A great twitter thread with tips from Mozilla](#)

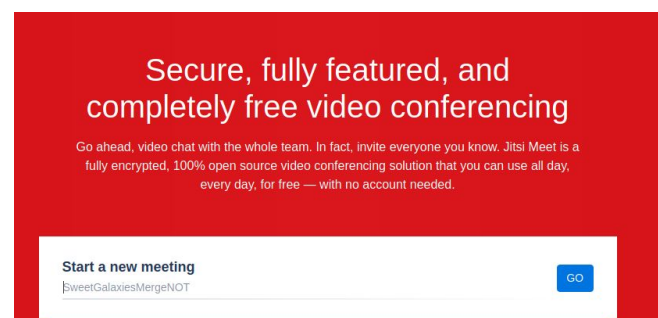
Depending on the time available, select activities and put them in order. This is the journey of your event.

Test the plan - or journey, flow or agenda - with a few participants and colleagues. Put yourself in the shoes of a participant. What do they need? Try something out, and then ask them.

Then, choose the right technical tools to deliver those methods.

Call platforms

- **Jitsi:** Unlike google hangouts, zoom and skype, [Jitsi](#) is a free and open

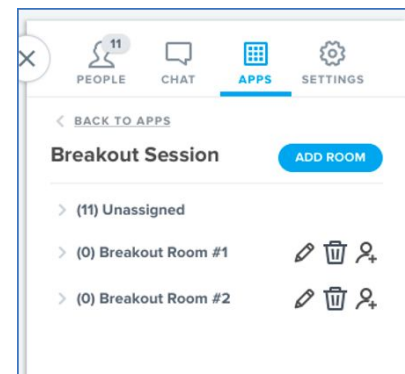


source tool. It uses encryption to keep your meetings confidential. It doesn't allow breakout groups, but is good for smaller meetings.

- **BlueJeans:** A cloud-based and secure call platform. [BlueJeans](#) offers various options to ensure unwanted participants from joining meetings and protect end-user privacy with security settings enabled by default or whenever required. The minimum and standard package is 9,99 dollar per month.

Break-out groups

BlueJeans and Zoom allow you to create [breakout groups](#), so you can split people up for discussions. You can either do this randomly, or allocate people to specific groups with a facilitator. These are a great way of shifting the dynamic of meetings - from one person talking to everyone (or most people) talking.



Other call platforms

And there are many other tools available. Some are more secure than others. Depending on the confidentiality of your meeting, you can also consider tools like:

- [Wire](#) – offers voice, video and conference calls, a messenger, file-sharing, and external collaboration, with end-to-end-encryption. There is a good free version, with pro packages from 4 euro/month.
- [Zoom](#) – widely used online call platform, with an option for breakout spaces. Free option for max. 40 minutes calls. Packages start from 13.99 euro/month.
- [Hopin](#) – designed to closely emulate larger conferences and events, with speaker, session, and breakout capabilities. Still in early access beta, untested at large scales. Price unknown.
- [Remo](#) – highly interactive webinar software designed to foster smaller 2-6 person breakout sessions. Starts at USD 50/month.
- [Crowdcast](#) – interactive and collaborative webinars, maxes out at 6 speakers at a time. Starts at USD 20/month.
- [Icebreaker Video](#) – video based networking, designed to bring people together to build new relationships through curated content and prompts. In private beta - pricing not known.

- [Demio](#) - an attempt to recreate in-person events (USD 34/month).

Polls and interactive tools

- Free:
 - [Zeetings](#) is a tool that allows you to prepare a presentation in powerpoint or google slides, then add polls, surveys and feedback directly (without asking people to download anything).
- Paid:
 - [Slido](#): Mainly designed for in-person events, but also has a remote meetings option. See an example of an organisation using it from [MySociety](#), which has moved its entire TICTec conference online. However, it's not cheap - pricing is around EUR 140 per event.

Collaborative documents

- **Set up collaborative notes:** It can be hard to speak up in an online call - create a publicly editable shared notes/agenda on etherpad/google docs or and encourage people to add to it. This creates multiple ways for people to contribute. ([source](#))
 - Tools:
 - Etherpad - secure and free - lots of sites host it (see [full list](#)), like [etherpad hosted by RiseUp](#). Note that many sites delete text automatically after 30-60 days, so copy across text after the call!
 - [Google docs](#) - very convenient, free and user-friendly tool, but bear in mind that notes from the conversation will be available to Google.
- **Use this collaborative document to add introductions, rather than asking everyone to speak individually:** To limit the time it takes to let everyone introduce themselves over the phone, include an introductions section in your notes. Ask people to write their name, location, and any other information directly into the doc. If anyone is not by a computer, allow

them to introduce themselves to the group over the phone, and ask the note taker to add their name and info to the collaborative doc.

Shared whiteboards and post-its

You might be familiar with using flip charts and post-its in offline events. That's possible in a virtual space as well :). Try an online whiteboard, where you can make diagrams and collaborate in real time with colleagues.



A secure option is [excalidraw](#) - everything in a shared session is end-to-end encrypted, and no data is shared with the people behind it.

- Free:
 - [Jamboard](#) - interactive, shared whiteboard made by Google
 - [Trello](#) - as a shared post-it tool
 - [Toasty](#) - ice-breaker exercises and other things
- Paid
 - [Miro](#): a collaborative whiteboard where you can work on things jointly with people. Decent free version and paid version (USD 10/person/month)
 - [Mural](#): a tool for brainstorming and creating diagrams. 30-day free trial, after that USD 12/person/month
 - [Retrium](#): If you want to create the 'sticky notes, clustering and discussion' format from in-person meetings, try Retrium. It's free for the first 30 days.
- Freemium version:
 - [Fun Retro](#) - virtual retros, brainstorming, etc (decent free option)

Also, see these [cards to hold up to show people when they're on mute or frozen](#). (See also - an [online version where you hold up your phone](#))

Ok, now your event is taking shape.

Add the activities in your facilitation programme in [your worksheet](#).

In [your worksheet](#), you will also find a template for a participants' program. You don't need to share your detailed facilitator program with the participants - just give them the highlights.

Step 4 - Prepare for the event

Your program is ready, and participants know what to expect. Now it's time to prepare. Like an offline event, that takes time. You'll need to test stuff out and get a team of people to support you.

These are some tips to start your event well prepared:

- **Devote a full time person to support and encourage chat.** They don't just watch for questions, but encourage participants' active participation with comments and questions, for example, "[name] - thanks for the recommendation." ([source](#))
- **For long meetings, consider additional roles to help the facilitator out.** A *bridge facilitator* can help connect in-person attendees with online ones, a *vibes person* can track and support the group's energy and participation and a *tech lead* can help support the variety of tech items that may come up. If your virtual meeting is long, use multiple facilitators. It's exhausting facilitating online because of the extra stimuli and processing from the screens. Some roles you might consider include:
 - Lead facilitator
 - Notes lead
 - Tech lead
 - Bridge facilitator (for hybrid meetings where some people are in-person)
 - Vibes & Energizers lead ([source](#))
- **Invite people to attend personally and encourage them in advance to share things.**
Explain that you need to hear their perspective on a critical issue - not just to listen. We too often underestimate the knowledge that attendees have, assuming the "expert" is the

only one who “knows”. This also makes people more likely to listen and participate actively. ([source](#))

Slides

Slides - or presentation - can be a roadmap during your event - but don't rely on them.

- **Take plenty of time to adapt the presentation to a webinar.** Go through it with the question in mind: Where in my presentation, am I going to add a time for my audience to interact? E.g. asking “do you know this manual/have you heard about this document?”. Rather than report-backs, think about ways that participants can interact on-screen and see live results. Writing a script that indicates clearly when the presenter is interacting with the audience and how the audience is engaged can help. ([source](#))
- **Try starting online meetings with an activity, rather than a presentation.** Going straight to a powerpoint can encourage people to switch off. Instead, you can try the [ADIDS](#)¹ methodology, which starts with an activity and a discussion of that activity, and only *then* introduces the report/toolkit/tool that you want the participants to know about.
- **Change things up visually to keep people's attention.** Help focus attention by changing the visual field every 60-90 seconds, and design for participant engagement every 3-7 minutes. ([source](#)) . Keep changing things up; chat, polls, cartoons, video clips. Sesame Street was built around a single, breakthrough insight: “If you can hold the attention of children, you can educate them.” The same is true for online meetings. ([source](#))

Tech checks

Instead of moving tables around, prepping the room and making coffee, you'll do tech checks:

- **Always do a practice run.** Test audio and video, but also rehearse how you will allocate time and discuss issues. You're asking for people's attention online, so the better rehearsed you are, the more they will pay attention.
- **Be present in the online call 10 minutes early.** If people join before, you can have a less formal chat with them - once participants have spoken once, they're more likely to later on.

¹ (Activity & Discussion, Input, Deepening, and Synthesis)

- **Prepare so that people can call in by phone, not just over a computer.** Share dial-in numbers when you set up the event.

Step 5 - Run the meeting

Now it's time to run the meeting.

These are some practical tips, based on personal experiences and other tips found online.

- **Make it personal.** By making clear to people why they are invited, welcome them when they enter the virtual space, call them by their names, take time for a proper check-in.
- **Encourage everyone in the room to be on camera, even if only for a moment at the beginning or end.** Video makes people feel more engaged because it allows team members to see each other's emotions and reactions - and we respond to facial expressions. ([source](#))
- **Set up collaborative notes.** Create a publicly editable shared notes/agenda to use during the meeting (like [etherpad](#) - see [Shared whiteboards under step 3](#)). This creates multiple modes of contribution and backchannels. It can be hard to speak up in an online call - make sure there's a place to write and be seen. ([source](#))
 - **Use a document to add introductions, rather than in person.** To avoid the time it takes to let everyone introduce themselves over the phone, include an introductions section in your notes. Ask people to write their name, location, and any other information directly into the doc. If anyone is not by a computer, allow them to introduce themselves to the group over the phone, and ask the note taker to add their name and info to the google doc.
 - **Try silent notes.** Ask an open ended question (or icebreaker at the beginning) and give people time for people to type their answers in the notes "silently". Then, the facilitator can verbalize answers/patterns they see and invite people to unmute and share. ([source](#))
 - **Encourage contributions in collaborative notes at all times** - for example, by writing "+1" next to comments you agree with. ([source](#))

- **Beware of big, open questions to the whole group:** people may not always want to speak to a large group of people they don't know well. Consider priming a few people so that they're ready to contribute beforehand, and calling them out by name to get things started.
- **'Raise your hand'**. On BlueJeans and Jitsi, among others, you can encourage participants to 'raise their hand' - demonstrating that they want to speak. If you have a role responsible for tracking the energy of the room - a 'vibes lead' - then they can highlight this to the main facilitator.
- **Collect questions throughout the meeting.** Use the chat function of BlueJeans or another tool, and designate someone to keep an eye on questions and bring them into discussion when it makes sense to do so.
- **You can also collaborate visually.** If you are used to working with post-its or templates, give it a try online as well. There are various tools available to do so. See under [Step 3, chapter whiteboards and post-its](#).
- **For long meetings, think about including small breaks and energizers** throughout the meeting to avoid screen time burn out. Try asking everyone to walk away from their screens completely for a couple of minutes ([source](#)). Depending on the dynamic of the group, you could also ask everyone to do a stretch, or take a deep breath. See a couple of energizers in [Step 3, above](#).
- **Reflect and evaluate.** Take time for people to reflect on their experiences. What did they like? This is a way to test whether you achieved your meeting goals, but also to learn about how the event was run. People are most likely to fill this out during the call itself, so think about preparing a 1-question survey or asking people to write something in the collaborative notes doc.
- **Don't forget to follow up and share key points with the participants.** If you have collaborative notes, share them with the group, highlighting the main takeaways. You can try recording calls, but most people won't sit through the whole thing.

Social hygiene, especially now :)

- **Establish the shared norms of conversation** (safe space, chatham house, harassment), just as you would for an in-person event ([source](#))

- **Multitasking is common in online meetings. But, for events where you critically need people's full attention, make sure they are actively involved.** If you ask for their attention, design the event so they are having to interact with you. If they are stuck just listening to you, they are always going to go back to their email. ([source](#))
- **Encourage others to make it a practice to show up early and converse.** Make it a practice for the conference lines to be open 10 minutes early. Ask someone to be there to greet and talk with people once the lines are open. ([source](#))
- **Mute/Unmute!** It's sometimes good to have at least one point on a call when everyone comes off mute and says something.

Interested to read more?

- [Tips on facilitating remote meetings](#)
- [Designing good meetings online](#)
- [MURAL guide to remote workshops](#)
- [So You Want to Host a Web Meeting?](#)
- [A series of resources on teaching online from universities](#)
- [A list of tips for holding remote events, including technical ones](#)
- [What I've learned from hosting 100 remote workshop](#)