BEST PRACTICES FOR VIRTUAL TRAINING

Clubs and districts are hosting virtual events more than ever before. Online training makes it possible for people to meet and learn from anywhere in the world.

Use this guide to help you plan and conduct online training events that achieve your goals.

You'll learn how to:

- **Organize** virtual events

- **Prepare** for online training

- **Facilitate** online training sessions

ORGANIZE

Organizing a virtual event requires a different way of thinking about logistics and your participants' needs.

VIRTUAL EVENT PLATFORMS

Consider using a virtual events platform to host your event.

VIRTUAL EVENT PLATFORM FEATURES AND BENEFITS:

- Registration
- Roundtable discussions
- House of Friendship
- Networking
- General sessions
- Recording of sessions
- Translation

VIRTUAL EVENT PLATFORMS POPULAR WITH MEMBERS:

- BigBlueButton
- Merestone
- RingCentral
- vFairs
- Virbela

VIRTUAL TRAINING PLATFORMS

Last year, more people in Rotary used [Zoom](#) for their virtual training sessions than any other platform. Depending on the license you purchase, features include:

- Chat
- Screen sharing
- Breakout rooms
- Whiteboards
- Recording

Other choices for virtual training sessions include:

- [GoTo](#) suite (GoToMeeting, GoToWebinar, GoToTraining)
- [Microsoft Teams](#)
- [Webex](#)
- [WhatsApp](#)

TIP: Begin looking at the different options for virtual training platforms at least two to three months before your scheduled event. You want enough time to develop your online program, promote the event, and register attendees.

ROTARY'S LEARNING CENTER

"Start with the My Rotary website and Learning Center.
Begin understanding what resources already exist. And from there, you can decide the rest of it."
— Louis Turpin, 2016-17 governor of District 7210 (New York)

Rotary's Learning Center offers courses and resources to help you plan your event, including:

- Conducting Online Training for tips on how to plan and organize training virtually

- Meeting Online learning topic for advice from members and Rotary staff on adapting in-person training to online learning
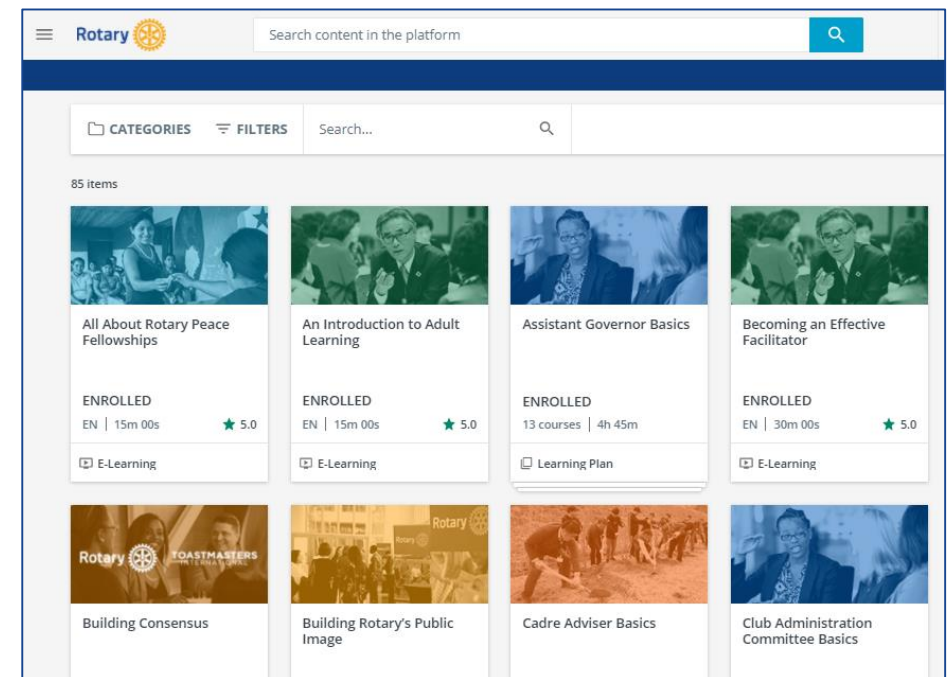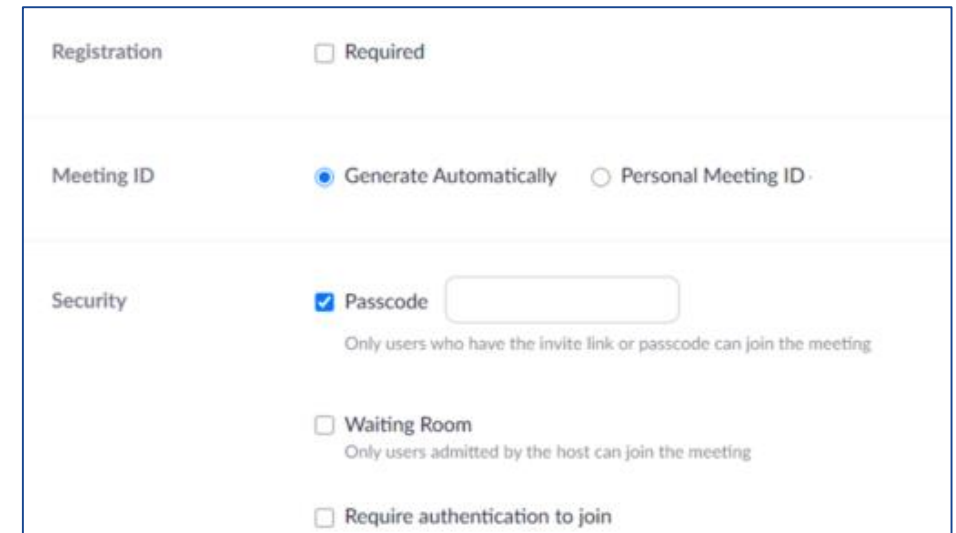
REGISTRATION AND SECURITY

Make sure your event is **attended only by people who registered** by using the registration and security features available on most virtual platforms.

For example, Zoom allows participants to either enter a passcode or wait for the facilitator to admit them to the session. Here are some other ways to strengthen your session's security:

- If you use a passcode for entry to the meeting, don't publish it on a public website or your social media accounts.

- Set cameras to be off and audio to be muted when participants enter the session.

TIP: When you send registration links to participants, note time zone differences.

Registration	☐ Required
Meeting ID	⦿ Generate Automatically ◯ Personal Meeting ID
Security	☑ Passcode [_____]
	Only users who have the invite link or passcode can join the meeting
	☐ Waiting Room
	Only users admitted by the host can join the meeting
	☐ Require authentication to join

SCHEDULING

No matter how engaging the subject matter, participants need breaks from sitting for too long in front of a screen. Plan your virtual event using these tips.

- Limit individual sessions to 90 minutes at the most, and include a short break in any session that's longer than 60 minutes.

- Schedule no more than 3 hours of training a day.

- Schedule sessions on the same day of the week and at the same time, as much as possible, to make it easier for participants to remember.

- Offer orientation sessions before training starts to help participants and facilitators use the online platform and all its features.

CONTENT

ADAPT CONTENT

- Decide how much information you can discuss in a 60- to 90-minute session.
- Review your in-person content to determine what still works in an online session. Remember, some platforms offer the ability to meet in virtual breakout rooms.
- Provide additional resources or assign homework before or after the session to accommodate information not covered in the online session.
- Change the format or style of the presentation, if needed. For example, reduce the number of slides or increase participant interactivity.

USE BLENDED LEARNING

- Mix in-person meetings with online sessions if possible. You might offer networking opportunities in person but discuss specific topics online.
- Ask participants to take courses in Rotary's Learning Center before your session. Then use your facilitated discussion time to apply what people learned in the courses to case studies, explore the topic further, or discuss information specific to your district or region.

TIP: Review the Learning Center Course Catalog to see the latest list of courses.

GLOBAL CONSIDERATIONS

Our members and participants live around the world.
Make sure they're able to attend your virtual event by following these tips.

- Clearly communicate the time zone where your training takes place and provide resources to help participants adjust their calendar, if necessary.

- Schedule sessions at times of the day that are convenient for all participants if possible.

- Include session materials in the meeting invitation so participants can review them ahead of time. This is particularly helpful for attendees who may be using their second or third language to participate in the sessions.

- If your participants speak a variety of languages and you need interpretation in more than one direction, Rotary recommends using [Interprefy](#).
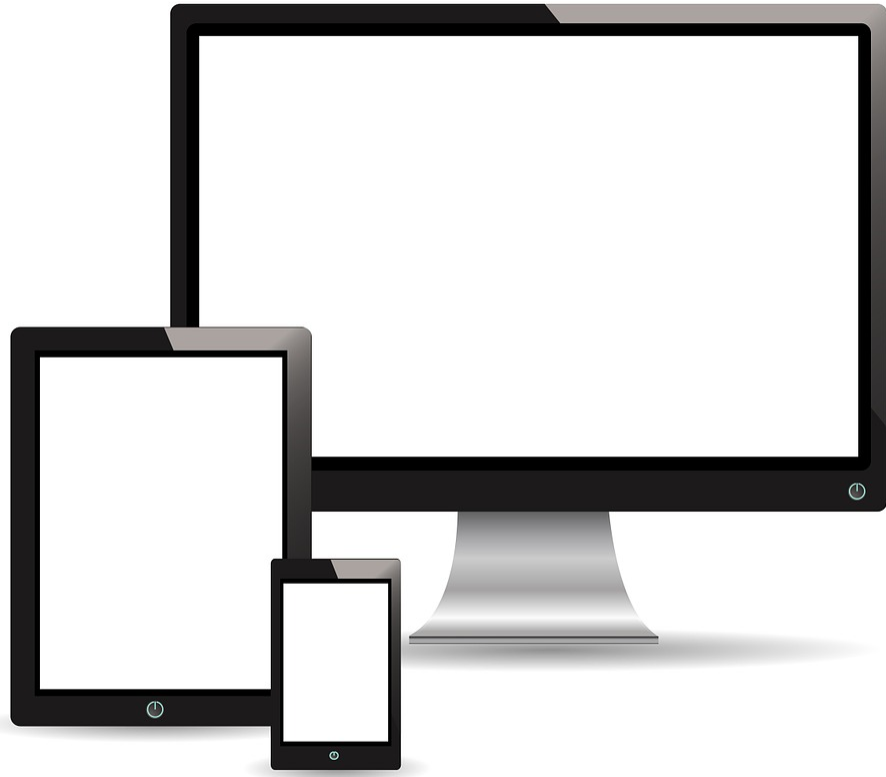
PREPARE

Preparing for a virtual event requires a different set of considerations than hosting in-person training.

EQUIPMENT

- **Use a desktop or laptop computer** rather than a phone or tablet so you can access all the features the platform offers.

- **Make sure you have the equipment you need** including headphones, a webcam, or a green screen, before your sessions start.

- When facilitating a meeting, it can be helpful to **have a second monitor** where you can keep your notes or other resources. Place the second monitor so you can refer to it without looking too far away from the camera.

- **Make sure your device has consistent access to the internet.** Upgrade your internet by purchasing a higher-speed connection if you routinely experience slow processing.

CAMERA

To ensure a professional presentation:

- **Raise your webcam** to be at your eye level so you can look straight into the camera.
- **Adjust your lighting.** Too little light can leave you in the dark or give your image a grainy appearance. Natural and artificial light sources can help. Try to have more light in front of you than behind you.
- **Reduce visual distractions** that appear behind you and consider using a virtual background. You can find Rotary-branded Zoom backgrounds in the Brand Center.

AUDIO

Make sure everyone can hear you by using these tips:

- **Use headphones** with a built-in microphone.
- **Reduce or eliminate background noise**, including music or animals.
- **Set your phone or tablet to "do not disturb" or silent mode** to ensure that you're not interrupted by text messages or emails.
- **Practice speaking slowly and enunciating your words.** This is especially helpful for people who are participating in their second or third language or have difficulty hearing.

CHECK YOUR EQUIPMENT

Make sure your connection is strong:

- Choose a location where your Wi-Fi signal is most reliable.
- Close all unnecessary browser windows and software on your device.
- Disable the Wi-Fi connection on other devices to optimize your bandwidth.

Practice using the major functions of your online meeting software:

- Camera and microphone
- Screen sharing
- Chat, question and answer panels, polls
- Recording

PRACTICE, PRACTICE, PRACTICE

- Practice the entire session with mock participants. Ask every question, move participants into breakout rooms, and conduct polls. The more you practice, the more confident and relaxed you'll be during the actual session.

- In addition to getting feedback from your mock participants, ask an experienced facilitator to observe your practice session and offer advice.

- First-time trainers or anyone who wants to refresh their knowledge can review the following courses in Rotary's Learning Center. Although these courses address in-person training, you can apply many of the lessons to online learning:

    - An Introduction to Adult Learning
    - Becoming an Effective Facilitator
    - Managing a Training Session

ANTICIPATE CHALLENGES

Don't work alone

- Make sure you have at least one person available who can provide technical support or take over facilitation if you need to step away.
- Have your support person take attendance and remove any uninvited participants.
- Ask your support person to provide links or resources relevant to your discussion in the chat panel so you can stay focused on the session. They can also address questions that come up in the chat panel.

Have a backup plan

- If your microphone or camera doesn't work, switch to another device, or ask your support person to serve as facilitator.
- If a participant's audio or video doesn't work, offer alternatives for their participation, such as using the chat panel to communicate.

OTHER WAYS TO PREPARE

Log in 30 minutes ahead of the scheduled meeting time so you can check for any technical issues and start on time. Here are some other tips:

- If you plan to share your screen during the session, have your document, website, or image open *before* the session begins, so you can quickly and easily access it.

- If you're using more than one screen, keep your facilitator's notes or leader's guide on a different screen than the one you're using for your meeting.

- Print any documents you may want to refer to in hard copy, especially if you're using only one screen.

- Have a pen and notepad available to take notes.

- Pour yourself a glass of water and remember to breathe.

FACILITATE

Although many aspects of in-person facilitation are the same online, you can also try these online-specific techniques.

STARTING THE SESSION

- Open your meeting room 30 minutes before the beginning of the session so you can make sure everything is ready and working.

- Ask participants to join at least 15 minutes before the start of the session to meet each other and check their sound and camera.

- Turn your camera on and be sure you're unmuted before welcoming participants.

- Ask participants to enter or update their name on the screen. Think about how you'll address any privacy concerns.
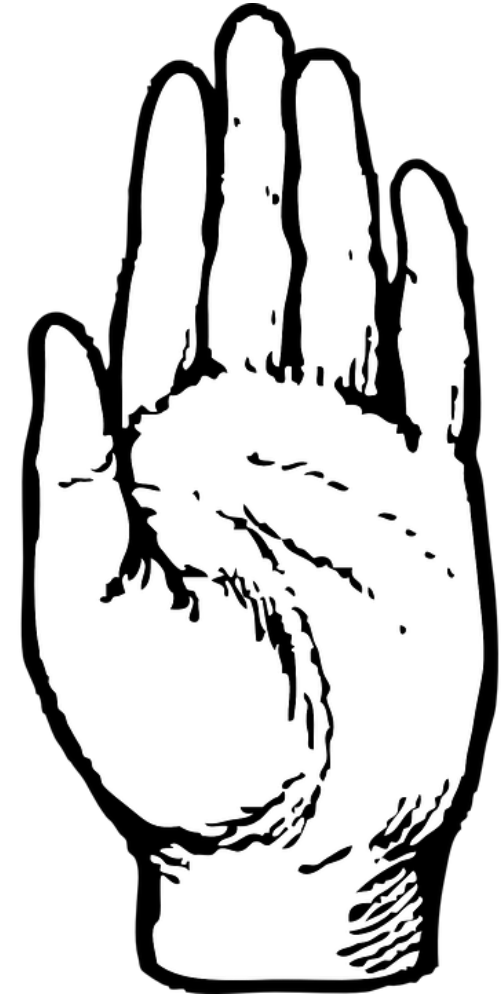
STARTING THE SESSION

- If you're going to record the session, tell participants ahead of time. Explain how they can protect their identity by turning off their camera, changing their registration name to first name only, and limiting their participation.

- Remind participants to mute themselves when they're not speaking.

- When you're speaking, you may want to "pin" yourself (make your image the dominant one on the screen). Think about muting all of the participants while you're speaking to eliminate distractions.

- Everyone's screen view of attendees is different, and the view may change as people join. So instead of asking people to introduce themselves based on how you see them on your screen, direct them to the chat panel, if it's available, for introductions or call on attendees using your list of participants.

DURING THE SESSION

- Look into the camera when you're speaking and listening. Keep your eyes on the screen at least 80% of the time to show you're actively engaged in the discussion. Resist the urge to look at your notes when a participant is talking.

- When participants are ready to talk, ask them to raise their hand in front of the camera rather than rely on the hand-raise feature of the software, if possible.

- Maintain your enthusiasm throughout the session to keep your participants engaged.

DURING THE SESSION

- Because it can be difficult to manage discussions remotely, allow extra time for questions and comments.

- Use silence while facilitating, but understand that it can feel awkward in a virtual setting. To avoid simply staring into the screen, take a drink of water while waiting for a response.

- Remember that you're on camera for the entire session and will be receiving as much focus and attention as you would have in person — maybe more! Be aware of your facial expressions, posture, and gestures at all times.

GLOBAL CONSIDERATIONS

- Rotary is a global organization and not all participants may be confident speaking in the language of the session. Make sure everyone feels included and able to participate.

- Speak slowly and enunciate. Avoid using jargon, slang, and colloquialisms, and explain any acronyms that might not be widely understood.

- Reduce the written text on slides to visually reinforce only the key points. Choose images, text, and examples that are relevant to diverse cultures.

ENGAGE PARTICIPANTS

- Whenever possible, limit the number of participants to 14 per meeting room. This allows the facilitator to quickly scan the screen for raised hands and other nonverbal cues.

- Avoid using slides or sharing your screen during a facilitated discussion so that all participants can see each other.

- Remind participants to join the discussion from a location that's not distracting to the facilitator and other participants.

- Ask attendees to close unnecessary browser windows and programs on the device they're using.

- Encourage participants to turn on their video to keep engagement high.

ENGAGE PARTICIPANTS

- Make time for networking. Consider opening the meeting room early and keeping it open for 30 minutes after a session ends.
- Get participants talking as soon as possible by asking questions and encouraging discussion.
- Encourage participants to use the chat feature, if it's available, for questions, answers, and discussion. Allow participants to download the chat at the end of the session.
- Use breakout rooms to give participants a chance to have a small-group discussion or work on an activity without the facilitator. Provide clear instructions before sending them to breakout rooms, including what your expectations will be when they return to the main room.
- Use polls to vote or check for understanding.
- Consider switching facilitators during longer sessions to avoid burnout.

RESOURCES

To learn more about online virtual training, review these courses and reference materials:

- [Conducting Training Online](#) course
- [Meeting Online](#) learning topic (in the [Learning Center](#))
- "[Online events are here to stay. Make yours a success in 6 easy steps](#)," *Rotary* magazine, January 2021

QUESTIONS?

Write to us at

learn@rotary.org