

Delivering In-Person Trainings Online

Learnings and Best Practices from CEA Training Delivery

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While there has always been a need and place for online trainings, the COVID-19 pandemic (starting 2020) made it unavoidable for teams and organizations to conduct online trainings. Regardless of their technological efficacy, experience, and skills, both the facilitators and the participants have been expected to create and participate in effective online learning experiences, some of which replace their in-person counterparts.

This document lists down some of the best practices and guidelines that can help anyone convert an existing in-person training into an online experience in light of the conversion and online facilitation of the Community Engagement and Accountability (CEA) Training supported by the Surge Learning Team in June 2022.

Figure Out Dependencies

Before editing and updating any of the training materials, it is very helpful to map out dependencies between platforms and materials used to deliver the training. This helps identify what needs to be edited before others and how it supplements the rest of the training materials.



In the CEA Training, the materials that needed updating had the following dependencies:

- Facilitator Notes
 - PowerPoint Slides
 - Activity Instructions for Facilitators (Microsoft Word)
 - Activity Instructions for Participants (Microsoft Word)
 - Activity Materials

Select Platforms

Before working on updating the training itself, it is good for the training/curriculum team to discuss and decide on the platforms that will (and can) be used to support online delivery:

- Which platform (e.g. Teams, Zoom etc.) will be used to host the training calls, what are the pros and cons of alternative options and which platform do the facilitators have more experience using?
- Does the training need engagement with the participants beyond the call platform itself? What sort of engagement is needed and which platforms are available for that? (e.g. brainstorming ideas can be done on Mentimeter, quizzes can be hosted on Kahoot or Zoom, and team responses can be collected on Jamboard or Padlet, activity instructions can be provided using PDFs)
- Does the training need to be recreated and facilitated by other teams in the future and if so, does it affect the choice of platforms? (e.g. it might be better to use free-to-use platforms if other teams might be delivering the training rather than using paid platforms)
- Can the number of platforms be reduced to make it easier and seamless for the participants to attend the training online? (e.g. if there are too many platforms involved, some participants might not be able to keep up with the technology and understanding required to participate)

Review, Edit, and Update

After the dependencies have been mapped out, and the platforms have been discussed, it is good to start reviewing and updating the actual materials used to deliver the training:

- Start from the end in the list of dependencies
- Instead of updating all materials at once, it is better to update one item and discuss the updated version with relevant team(s) for feedback and review
- Keep into consideration how the participants will need to be engaged every once in a while, instead of just giving them slides to look at. While it is easier to see participants' engagement levels in-person, it is a challenge to keep them up in an online setting and hence you might need to add additional elements to make up for that. Some examples include asking the participant a question and taking the answer(s) from them instead of giving them the answer(s), running polls, including additional breaks, asking them to read the slide materials instead of reading it yourself, breaking them into groups
- While groups can be divided into breakout rooms during an online training, this can be done manually by the facilitators (where they place participants in each room each



time) or have the participants do it (where they choose the room based on their group)

- After review and approval, continue updating training materials following the list of dependencies starting at the bottom and working all the way to the top

Pre-Work and Invites

Depending on the platforms and activities involved, there might be a need to include additional pre-work in the calendar invites for the training sessions. It is good to send out the invites as soon as possible so the participants can set aside the time required and include any pre-work needed on their part:

- Do the participants need to download any software on their laptop? (e.g. Zoom app vs Zoom web)
- Do the participants need to update any software or settings before joining the calls?
- Do the participants need to be aware of any groupings they are a part of?
- Do the participants join directly from the link or do they need to sign up somewhere to get their own link for the calls (e.g. Zoom registration vs open calls)
- Will there be a tech dry run in the first call or should the participants try and prepare for the training call on their own? What resources might they need to prepare?
- Can the calls be attended from phones, or does it need to be a laptop or a computer only?
- Do the participants need to have a notebook/pen or something else for any of the activities?

Roles and Responsibilities

It is very important for the organizing and facilitation team to figure out and divide roles and responsibilities among themselves just like it is done so in an in-person training:

- Who will be responsible for handling tech support like launching polls, opening breakout rooms, start timers etc?
- Who will be presenting and who will be facilitating?
- Who will send file and website links in the chat?
- Who will monitor chat?
- Who will monitor hand-raises by participants and their queries?

Dry Run and Lunch

Once all aspects of the training have been updated, it is critical for the organizing and facilitation team(s) to schedule some dedicated time to run through the activities and flow of the training calls and flag out any remaining aspects that need to be addressed.

Many times, it is also highly beneficial to schedule some time in the first training call to do a tech dry run with the participants as well so they can familiarize themselves with the



platforms they will be using. This dry run call can also be scheduled separately as a part of their onboarding process.

While there are many tools, guidelines, and resources available to help you make the most out of an online training experience, both as a participant and as a facilitator, we hope this document can supplement your needs for online trainings when the material to be delivered has been created for in-person trainings and needs adapting before it is presented.

For any further questions or support, feel free to contact surge.learning@ifrc.org