**Training in an online environment**

**Short introductory guide**

**1. From face-to-face to virtual classes**

The term online learning is all-encompassing and is normally used to refer to delivering education using the internet. The ways in which can be achieved, however, varies greatly: from podcasts and downloadable content, informal education (such as Massive Open Online Courses – MOOC) to fully-fledged, institutional online courses delivered in the context of the academia or the profession.

At the beginning of 2020, with hardly any warning, educational and training institutions around the world were forced to abruptly halt in-person classes and switch to on-line format. Over the past decade, online training has grown in quantity and quality; the advantages of being able to benefit from training without the need of moving to a given location have been emphasized and enjoyed by larger numbers of individuals; availability asynchronous training possibilities made it feasible for professionals to fit learning that they would have otherwise missed into their busy schedules, also providing an opportunity to explore new topics and issues. The pandemic revealed to everybody, even the skeptical or uninterested trainers and learners, the potential of online learning.

Although, in normal times, online learning and traditional in-person instructions are not opposites, the pandemic prompted us to perceive them as such. This will remain as long as the emergency regulations, restricting in-person training, are in place. Beyond that, however, it would be good to see online training as complementary to classroom teaching. What the pandemic imposed on trainers and training institutions, however, was much more challenging. Indeed, one thing is to offer online training packages (such as the ones available on the CoE’s HELP platform) which are conceived from the start for online delivery, are prepared with the support of digital communication experts and graphic designers, and are made available of learning platforms that encompass a number of interactive features; another thing is to be forced to switch from face-to-face to online without any prior skill or preparation and, sometimes, without the needed resources. Transitioning activities which were meant to be in-person, and that had been traditionally delivered in classrooms, to the online environment involved inevitably a lot of work, required the acquisition of new proficiencies, and imposed re-thinking of the way in which training could be delivered without compromising the quality and attainment of the set learning objectives, declined in knowledge, skills and values. Lack of adequate digital skills and infrastructures (such as, to start with, a powerful internet connection) for both trainers and trainees to undertake training online, the difficulty of delivering traditional work-based learning online, and the struggle of teachers used to classroom instruction. E-learning, particularly when involving asynchronous session, also requires self-regulated learners, who should be able to dilute their intake of classes at a regular pace, so as to be able to digest and reflect on the various issues proposed, instead of binge-watching videos right before a live class. Commitment to go over activities without external oversight is also required. All this, was made additionally difficult due to the stress of the pandemic and the confinement rules. Moreover, the so-called “pandemic fatigue” affecting personal life after a few months form the virus outbreak translated into an “on-line training fatigue”, what at the beginning appeared exciting, new and convenient, after a few months standing a lot of time in front of a video, either for conferences, work or training, is perceived as burden.

Having in mind all the above, as well as the experience gathered in the course of 2020, it was deemed opportune to include in this Manual also some considerations on on-line delivery, so as to provide some additional tools and inspirations to all those engaged in training of adult professionals on how to maximize value for their audience. They are formulated in the forms of DO’s and DON’Ts. A few have to deal with technology or technical aspects, others are related to the training methodology.

**2. Choosing the tool: videoconferencing tools or Learning Management System (LMS)?**

The first choice trainers have to make concerns/in regard to the tool to be used. The instruments available can be broadly distinguished into two main categories. What follows is an overview of their features, so as to guide trainers into choosing the best one for their courses.

**2.1 Videoconferencing tools**

If your Institution has a LMS, you will be probably asked to deliver via that platform, you should have been trained to use it, and should be able to count on technical support. In case your institution does not have a platform for online training, the easiest, most immediate way to deliver online training is via a virtual room. On the internet, there are a variety of different videoconferencing tools available for free (Zoom, Google Meet, Skype meet now, Cisco Webex), whereas others are only available under as subscription plan (Kudo).[[1]](#footnote-1) The free version of such tools normally encompasses basic features such as screen sharing and a chat box, where participants can interact with the trainers and amongst themselves (via private messages) in the course of the session. Upgrading is normally offered for a fee and comes with additional possibilities, such as enabling the participation of a higher number of participants, availability of multiple channels for interpretation options, the option of launching polls or surveys, use of digital chalkboards, meeting recordings, meeting transcripts…. Training can be delivered effectively without such extra features, also because some external tools can be used in the course of the training to compensate for the tools that would only be available for a fee. There are, however, a few points that are a MUST to be able to deliver effective training.

**Tips and tricks when choosing your virtual room:**

* Opt for a tool that enables **reciprocal visual interaction** between the trainer and the participants. It can be rather alienating for a trainer to talk in front of a black screen as much as it is difficult for participants to watch slides without seeing the trainer’s face and benefit from the non-verbal communication;
* Ensure that the **screen sharing option is available, not only for powerpoint, pdf or word documents you might want to show, but also for audio visual media,** so that your delivery can benefit from the use of different training tools.
* Prefer tools **with breakout rooms option[[2]](#footnote-2)**, which is often a paid feature. This a convenient option that allows trainees to talk amongst themselves, for instance discussing a case and sharing material to be presented later in plenary session.

**Summary table of the main functions of a selection of video-conferencing tools**

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | **BLUEJEANS** | **Comments** | **BLUEJEANS EVENTS** | **Comments** | **KUDO** | **Comments** | **ZOOM** | **Comments** |
| **Price** | Free | - | Free | - | Paid | Interpretation department or FC | Free (basic version) and paid | Based on the FC |
| **Breakout rooms** | YES | Participants can be divided into different rooms at any time of the meeting.  The moderator regulates when the breakout sessions to be terminated | NO | It is possible only via different meeting links | NO | It is possible only via different meeting links, thus the KUDO operator needs to be informed to provide the different links. | YES | Participants can be divided into different rooms at any time of the meeting. Moderator regulates when the breakout session to be terminated |
| **White board** | YES | only via the application | NO | - | YES | - | YES | - |
| **Annotations** | YES | only via the application | YES | - | YES | - | YES | - |
| **Polls/voting** | NO | External platforms for polls may be used | YES | - | YES | - | YES | - |
| **Sharing documents** | NO | Speakers can share required documents with the project team before the meeting and they can send them to participants by email | NO | Speakers can share documents with the project team before the meeting and they can send them to participants by email | YES | Only the moderator and speakers can share documents during the meeting | NO | Speakers can share documents with the project team before the meeting and they can send them to participants by email |
| **Moderator** | YES | Any person can be a moderator with a password | YES | Any person can be a moderator with a different link | YES | Moderator needs to be communicated to the operator before the meeting. There can be a moderator (technical moderator) and a facilitator, but both of them will appear on the screen throughout the meeting | YES | Moderator is called host. There can be one host and several co-hosts |
| **How many participants?** | YES | up to 99 - can take the floor at any moment by just unmuting their microphone; all of them have access to chat | YES | Two categories of participants, each will receive different link - speakers (can take the floor and talk) and attendees (can only listen, write in chat and have Q&A; if they want, they can request the floor and be promoted to a speaker by the moderator) | YES | Two categories of participants, each with different link - participants (have access to chat, can take the floor and talk) and viewers (can only view without access to chat/talk) | YES | Host can give the right to participants to share screen |
| **How many people can you see on the screen?** | 9 | 3x3 via browser  25 via the application | 9 | 3x3 | 4 | 2x2  Depending on the contract with the provider a max. of 6 people can appear on screen | 49 | - |
| **Simultaneous interpretation** | NO | - | NO | - | YES | - | YES | Only via the application |

**2.2. Learning Management System (LMS)**

To provide a more comprehensive user experience, particularly in the case of articulated training programmes, web conferencing tools might not be sufficient.

Even if your institution is not equipped with its own LMS, nothing prevents you to set up one. Just like with the videoconferencing tool, on the internet you will find a number of platforms that, in their basic version, can be used for free, such as [Moodle](https://moodle.org/), [Google Classroom](https://classroom.google.com/), [Microsoft Teams](https://products.office.com/en-US/microsoft-teams/group-chat-software), [Schoology](https://www.schoology.com/) or [Edmodo](https://www.edmodo.com/). LMS are all-inclusive tools that help you create a permanent environment (as opposed to the virtual conference room, which is ephemeral) where you can share resources and materials within the community of your learners, and contribute to strengthen that community by facilitating peer teaching. Even in the basic versions, the features you have will enable you to create forum (for asynchronous discussions), chat (for synchronous discussion), assignments, wikis (collaborative tool that allows participants to edit a webpage, just like a Wikipedia page), setting deadlines for the different activities and establish a repository of documents or other material accessible at any time by your audience. LMS are normally available in English and require a good command of the language by the instructor and a basic one by the learners to work well. Each comes with its own manual and instructions on how to implement your courses, including tips on timing of activities, assignments and ways to boost and motivate your audience.

**3. Online delivery: basic guidelines on the training methodology**

**A few golden rules**

* Online training cannot be a mere replica of in-person teaching
* The virtual room is not the only “place” and “time” where training is to be delivered;
* Live sessions are not the only tools to be used. Do not attempt to cover the content of an entire training through live classes. A number of different tools can be combined instead.
* Training fatigue is your worst enemy! Fight it by diversifying the offer so as to keep your trainees committed.

**Plan, plan, plan**

Especially for beginners, preparing for an online session requires much more planning than for a traditional one. This, regardless of the experience you might have in training. In the online environment, participants’ attention is difficult to keep up and more often than not your participants will not be as reactive as they would be during an in-person session. Therefore, in order to avoid that your training revolves around a one-way presentation, it is even more important than during face-to-face events, to plan your class carefully. At the beginning you should consider that for every hour of training you might need up to a couple of hours for preparation. After a while, of course, having gained familiarity with the tools, with your e-training style and with the dynamics of online training, time needed for preparation will decrease. The responsibility for the preparation of the training lies primarily with the trainer, even though, especially in case your institution has its own training platform, you might need to interact with those responsible for its set up and management. As in the in-person delivery, planning means that you should outline the content of the class, the learning objectives, the time needed, as well as the training technique that better enables reaching the desired results. When choosing the training techniques, do not forget to vary them, so as to be able to keep the participants’ attention high at all (or most) times. Online training leaves fewer possibilities of sudden changes in order, for instance, to follow the group dynamics. Therefore, having a clear schedule (as well as a couple of backup plans in case the activity you are proposing does not work as anticipated!) and following it step by step is of much help. Also, do not forget to spend enough time familiarizing with the tool you will be using. There is nothing worse than a trainer who is not able to function the training tool! Last but not least, remember that despite their potential, virtual learning environments are often not used to their fullest extent: trainers should take the time to familiarise with the possibilities available and creatively think about how to use them;

**Focus on advantages of online learning, not on challenges**

Online training provides a totally different training experience. It is up to the trainer, at least up to a certain extent, to make it even better.

Remember to **switch your mindset** and explore the possibility of online training to the fullest:

* **increased opportunities** to have guest lecturers that otherwise would have never been able to join due to tight diaries;
* **simpler organization** of alternative or additional events, such as roundtables involving many experts;
* **play with technologies**

**Consider the possibility of having both asynchronous and live sessions**

As it is very difficult to keep participants motivated and attentive in front of a screen for hours first of all, consider the possibility of preparing ahead of the training **short videos, up to 30 minutes, to be watched by participant before the live session, within a given time frame.** This, also coupled with assignments related to the videos, can boost the interactivity during the ensuing live session. The idea is to use live time to deal with practical issues. Live sessions, even more than ordinary in-person session, should be problem-oriented rather than knowledge-based.

**A few tips on live and pre-recorded lessons**

* Long live sessions can be replaced by **shorter modules** and **micro-lessons** to illustrate the learning scenario;
* In addition, or as an alternative, **you can foresee assignments** for your participants, which are to be analyzed during the live session;
* **Breaking down long sessions in shorter ones**, alternating live and pre-recorded sessions, and making live sessions available at a later stage, will help participants with limited resources (i.e powerful internet connection) to fully participate in the learning experience;
* **Resist the temptation of using prerecorded sessions you might have already available**. This makes participants fee as they are outside observers and not the direct addressee of the training;
* **Avoid streaming face-to-face sessions**. There are normally issues with the audio, the framing, people moving around and is simply not engaging.

**A few tips on the technical side**

* Training from a portable computer or desktop as opposed to a mobile device is more convenient as it will allow you to use multimedia and benefit from a wider screen facilitating interaction with participants;
* Connection, audio and video must be **checked beforehand** and be of **average quality**. You do not need exceptional material to deliver good training. Use of a headset is advised;
* **Recording the sessions** can be a good idea: as the video can be made available to participants in case they want to go back to some concepts and it will allow the trainer to create a library of online classes that can be used (partly or fully) in the future;
* When delivering or recording your session, opt for garments in plain, non-flashy color and ensure that the room light comes from the front, not from the back;
* choose a **quiet place** and remember to inform other people who might be around about what you are doing and for how long, so as to minimize disturbances and noise;
* remember to silence all social media and apps that might come in with notifications on your screen and phone, so as not to be distracted;
* keep only needed pages or apps open onto you screen, particularly if you are planning to share it!

**A few days before the live session**

* Send an email to participants with the link to the training and including a few instructions on how to access it (particularly important in case they need to download an app);
* Some tools allow participants to directly save the date into their electronic diaries: if this option is available, do not hesitate and use it!
* Remind the audience about the level of interactivity they should expect to have in the course of the training;
* Inform them you are planning a dynamic ice-breaking opening/exercise for which they need to prepare in advance (i.e. bring an item that represent themselves);
* **Inform participants** **if you are planning activities** (quizzes, polls) that require participants to **operate on two devices at once** (i.e. following the session on the computer screen and answering a quiz on their mobile);
* check that all participants are in a position to operate on multiple devices, if need be; **if not, consider the opportunity to drop the idea**, as this might be perceived as non-inclusive.
* Consider **carefully the workload** that dealing with additional material and assignments given prior (or after) the live session require. Be sure you are clear in your expectations about what is mandatory and what is optional;
* If you are planning **self-paced activities prior to a live session** (for example the mini videos or readings assigned in preparation of the live session), **prompt participants’ feedback** by, for example, asking them to be prepared to illustrate the main points of what they have gone through in 3 sentences they will present during the session;
* Test the appearance of your online class before you launch it: **ask a colleague to run a trial connection** and assess whether the setting you have chosen, the framing and the media are effective.

**During the live session**

* Connect well before time to check the equipment and prepare the training;
* Organize a “**welcome coffee” to greet participants**. Prepare a nice slide, for example with the word “Welcome” and insert a few words such as “Grab your cookie and coffee and get ready for this training” to be left on the screen, maybe accompanied by a nice lounge music as you wait for when it is time to start the training;
* remind everybody about the “housekeeping rules” (mikes off, videos on, use of chat box, how to request the floor;
* Do not transform your live sessions into a monologue or, worst, soliloquy. Vary techniques often! **Use polls** to ask questions, via the platform you use or via external tools, **use more visuals** (pictures, graphs, word clouds, infographics, etc) and avoid a lot of texts.
* **Sitting in front of the computer** is not very exciting but **probably the best way to deliver on line**, enabling you the control of the screen, of the chat and ensuring that the framing is correct.
* **Standing positions are possible**. In such cases, however, it might be good to mark the right position with a tape placed on the floor, so that in case you have to sit in front of the pc and then come back, you will know exactly where to. Should you opt for a standing position, however, consider that without a camera operator, it will be virtually impossible for you to write on a flipchart or on a board and have trainees read them.
* **Some of your participants might connect from a mobile** device: thus, it is even more important than usual to prepare effective slides, limiting their content to few bullet points, and using large font (+30 min.);
* **Managing the chat or requests to speak** whilst delivering the training might be challenging and contribute to breaking the momentum. On the other hand, keeping all questions at the end might not be always convenient;
* **Do not improvise!** Most techniques you are going to use require careful prior planning. For instance, breakout rooms require the creation of groups (to be determined in advance, to be set up during the training on the basis of certain criteria, etc.), instructions to be given to the participants, naming of the rooms (if possible) to make the experience more tailor-made, distribution of material, and timing;
* Just because you are online, it does not mean you cannot use **self-assessment tools to track learning progresses!** Current available tools allow for high interaction and contribute to increasing the dynamics of the course. Check the table at the end of these guidelines for the best tool!
* Collecting “evaluation forms” via email or through the tool you are using might have the disadvantage of not ensuring anonymity. If the latter is a priority to you, as it should be in most cases to receive an honest evaluation, consider using other tools, such as [Menti](https://www.mentimeter.com/?utm_campaign=first%20page&utm_medium=web-link&utm_source=govote&utm_content=&utm_term=&_ga=2.54758123.1943164468.1607596323-694245574.1559817956), live!

**After the training**

* Do not overwhelm students with links, readings, and other documents in addition to the live or pre-recorded sessions.

**Summary table of interactive resources to be used during training**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Application** | **Key features** | **Definition** | **Use** | **The free version includes** | **How it works** | **Links** |
| **KAHOOT** | Test content through a **quiz or a game** | Kahoot is an interactive game-based learning program where you can create free quiz games. A host creates a set of questions for the participants and projects it on a shared screen. The audience reacts to the questions by using their mobile devices. | - For trainings: to receive instant feedback from the participants through mini quizzes  - For meetings and webinars: to receive real time ideas or raise awareness on a specific topic or to see the general knowledge of the audience on the topic of the presentation | - Creating quizzes or poll questions which can be answered either through multiple choice or true false questions.  - The free version has more functionalities if you register as a teacher | - The presenter (Kahoot quiz creator) should have an account  - no need to download an application for presenters or participants.  - the participants get a code to connect to the quiz page and answer questions using their mobile devices, the questions and results are presented on the shared screen. | Main site: <https://kahoot.com>  Game code entry: <https://kahoot.it/>  [Tutorial Link 1](https://www.youtube.com/watch?v=KJgZZQcsSPk&list=PLVpm5New2Rw-StW-dFikh3BEVx78CSPyR)  [Tutorial Link 2](https://www.youtube.com/watch?v=pAfnia7-rMk)  [Tutorial Link 3](https://www.youtube.com/watch?v=rZUew1wIQts&list=PLVpm5New2Rw-StW-dFikh3BEVx78CSPyR&index=3) |
| **PADLET** | **Collaboration** tool to share documents and content through an online bulletin board | Padlet is an online virtual “bulletin” board, where the host and participants can collaborate, reflect, share links and pictures, in a secure location. Padlet allows users to create a hidden wall with a custom URL. | - Before a webinar or a training necessary documents could be shared on the padlet board.  - During the webinars/trainings the participants can share real time feedback in written texts, vote or grade the content put on the wall by the author of the padlet.  - After the meeting the same wall could be used as a portfolio by the participants.They can add their own material or carry out discussions. | -Creating three padlet walls. For each wall you can choose out of 8 different formats according to the material you would like to share.  - Customise the way the participants can react to the material (giving scores, giving stars, like-unlike) | - The presenter (Padlet author) should have a padlet account which is free  - no need to download an application  - the participants receive a link through which they can reach the wall, read the content, react or collaborate  - if participants do not have an account, they have to write their name when commenting, otherwise the post will be anonymous | Main site: <https://padlet.com/>  [Tutorial Link 1](https://www.youtube.com/watch?v=2lllMVGf30w)  [Tutorial Link 2](https://www.youtube.com/watch?v=7SuAKOoXNsQ) |
| **MENTIMETER** | Instant **feedback** during an online meeting | Mentimeter is an interactive presentation tool that allows users to engage their audiences in real time. At the same time it is a polling tool wherein you can set the questions and your target audience can give their input using a mobile phone or any other device connected to the Internet. | -During a webinar/training it could be used as a supportive presentation tool. You can raise the participants’ awareness before the presentation or summarize your content after the presentation with the help of customized slides in which you can use a variety of formats (word clouds, quotations, polls, shared videos, open-ended questions, etc)  - word cloulds can be a good visual way to get an instant feedback for an event | - Creating mentimeter presentations (limited to 2 questions and 7 slides)  - Place to ask questions for your participants in different forms | - The presenter (Mentimeter author) should have an account which is free  - No need to download an application for presenter or participants  - the participants receive a link through which they can read the content, react or give feedback. | Main site: [www.mentimeter.com](http://www.mentimeter.com)  [Tutorial Link 1](https://www.youtube.com/watch?v=i_UZoS9_bMQ)  [Tutorial Link 2](https://www.youtube.com/watch?v=vb48V28mASs) |
| **TRAININGCHECK** | Surveys, evaluations of activities | Trainingcheck is a tool that helps to anonymously evaluate training, workshops, conferences and other learning activities  It allows to manage multiple evaluations, collect feedback on line or on paper, track responses, schedule reminders. | For trainings: to receive comprehensive feedback from the participants through the electronic version of the paper evaluation form | Creating evaluation questionnaries with multiple questions  - Possibility to ask questions to participants in different forms | - The presenter (Trainincheck author) should have an account which is free  - No need to download an application for presenter or participants  - the participants receive a link through which they can read the content, react or give feedback. | Main site at https://www.trainingcheck.com |

**Additional resources**

**Games (similar to Kahoot!)**

[**Pear Deck**](https://www.peardeck.com/) – a presentation tool + assessment. You can design presentations, questions, polls, quizzes and formative assessment. The free option includes standard functions.

[**Quizizz**](https://quizizz.com/forwork) – create quizzes and online games. The participants can respond from their devices.

**Feedback/Assessment (similar to Mentimeter)**

[**Sli.do**](https://www.sli.do/)**:** it can be used for immediate feedback with a wordcloud or graphs. Up to 3 questions in the free version.

[**Poll everywhere**](https://www.polleverywhere.com/) – an alternative to Mentimeter. You can create unlimited number of questions/quizzes.

[**Socrative**](https://www.socrative.com/#play-video) – assessment tool. It can assess participants from any device, supports unlimited number of people and provides detailed reports afterwards.

**Collaboration (similar to Padlet)**

[Instructure](https://www.instructure.com/canvas/?newhome=canvas) – Google + Canvas platform for learning. It can create assignments, share presentations, comment, exchange and show. It is free.

[**Stormboard**](https://stormboard.com/)– online solution for capturing, organising and prioritising ideas. Add, comment, assign tasks or put notes for participants/trainers/colleagues. It can be used also for unit meetings or brainstorming sessions.

[**Web White Board**](https://awwapp.com/) –you can create a slide or presentation, draw, comment and invite other people to do so. It is good for brainstorming sessions. Web White Board works on laptops, computers and phones.

[**ClickUp**](https://clickup.com/1?utm_expid=.m0awzPKhRiaeu5QZBeY2YQ.1&utm_referrer=)– a productivity platform. It keeps your work organised in one place. You can create and plan your documents, tasks, calendars, spreadsheets, timelines and goals and share it with anyone. Free for up to 100MB of storage.

[**Brainscape**](https://www.brainscape.com/): A platform that allows students, teachers, and corporate trainers to create electronic flashcards. You can also search the flashcards created by the publishers and users.

[**Seesaw**](https://web.seesaw.me/): The Learning Journal is a user-driven digital portfolio that inspires users to work better and saves time. You can create lessons.

[**Trello**](https://trello.com/home)– online tool for planning, organisation of a training, coursework or collaboration in a user-friendly manner.

**Interactive presentation (in addition to PowerPoint)**

[**Ahaslides**](https://ahaslides.com/) – Interactive presentations for your meetings, classroom or trivia nights.

[**Edpuzzle**](https://edpuzzle.com/)– tool for creating lessons, trainings or programmes online for educators.

[**Powtoon**](https://www.powtoon.com/?utm_source=blog&utm_medium=content&utm_campaign=2019_4_top_blog_posts&pa_id=erSJ4UHQwCA) – a visual communication platform where you can create your own presentations and videos. Templates exist, no need to have design skills. There is a free version.

[**Prezi**](https://prezi.com/) – you can export your PPT in here and create interactive presentations. Free basic version is available.

[**Video scribe**](https://www.videoscribe.co/en/) – it is an website where you can create animations and scribes and make presentations with these slides. No need to draw or have design skills – they have a huge library. One-week free trial and then 13 eur per month, used by top Universities.

[**Unsplash**](https://unsplash.com/): Free stock photos

1. The list is merely exemplary and informative. It is not meant to recommend any of the listed products. [↑](#footnote-ref-1)
2. Breakout rooms are sub-meetings within a main meeting. They are controlled by the organizer who can create normally up to 50 breakout rooms to facilitate focused small-group discussions, which can be difficult in larger virtual group settings. Organizers can start/stop rooms, move assignments, visit individual rooms, observe, listen, and intervene into the discussions, make announcements, just like s/he would do during a face to face session. Room participants can contact the organizer in chat. [↑](#footnote-ref-2)