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Online Delivery Best Practices Checklist

Below is a guide for online facilitation preparation and delivery. This is a living document so it will change from time to time. This document is to be utilized as suggestions for facilitators and has been used by various people in Financial Empowerment department at Momentum.

Note regarding modules: You can either send out the module before or after the session, this is at the facilitator's discretion. Facilitators are encouraged to try both methods (send it out before and after the workshop) to test out which method is more effective for learners.

There are two main approaches to online learning: traditional and flipped classroom. In traditional, the workshop is first delivered, then additional material or assignments are sent out to the learners afterwards. In the flipped classroom approach, the information is emailed out beforehand, learners are expected to read over the information, and the workshop focuses on discussion, learner engagement, brainstorming and debriefing the material.

Before the workshop:

- ☐ Ask the agency host/Admin administrator to speak at the beginning of the workshop to introduce the facilitator at the beginning of the workshop, and to explain why it is important that the registration forms are completed.
- ☐ Clarify the objectives of the online workshop with the host agency staff
- ☐ You can name the workshop Money Management Lite (I.e.- Budgeting Lite, Assets Lite, etc.), this way it is clear that, within the time period allocated, only some of the topics of the whole module might be covered. This will ensure that the expectations of the Money Management in-person sessions are not the same as for the online session. Usually workshops delivered online are shorter than those delivered in-person.
- ☐ Have a sign-in list during the session (the Admin or agency host should keep track of who joins the session, first name, last name, email and phone number)
- ☐ Have Admin or agency host keep track of number of participants registered, number of participants who attended the session, modules disseminated, and registration forms.
- ☐ Allocate at least 5 minutes at the beginning and end of the workshop for registration forms to be filled out by participants.

During the workshop:

- ☐ Pre-load any websites and files needed for session. If your internet connection is slow, try disconnecting from the VPN before starting the video call.
- ☐ At the beginning, inform participants of the protocol in case the facilitator is disconnected from the video session (e.g.. - participants are asked to stay on and the facilitator will join as soon as possible). Ask forgiveness for any technical difficulties.
- ☐ Outline the objectives and/or the goals of the workshop

- ☐ Review good online etiquette with the participants:
  - Please mute yourselves during the presentation
  - You are encouraged to keep the camera and mic on during discussion and engagement sessions
  - When asking a question, remember to unmute yourself. Ask questions and interact using the chat
- ☐ Review expectations around chat during workshop (i.e.- will only be checking the chat during breaks and right at the end of the session to answer any questions)
  - If you have an admin person, cohost or agency host, they can monitor chat for you, synthesize questions and respond to the chat.
- ☐ Limit number of participants per workshop to 12, this number still encourages participation in group exercises without it feeling too big.
- ☐ For the group engagement:
  - Include a few opportunities for group discussion throughout the presentation
  - Provide several ways of engagement (e.g. polls, breakout rooms, chat, large group discussion).
  - Colour code discussion questions differently from all other slides to capture the participants' attention and provide a visual cue.
- ☐ To encourage participation during workshop use the reflect, write and share method
  - allow participant a couple minutes to complete each part of this method
  - Have participants reflect on a question
  - Ask the participants to write down their reflections
  - Ask a couple of participants to share their reflections
- ☐ During an in-person group discussion, the recommendation is to be silent for 7 seconds, whereas during online group discussion hold 12 seconds. This pause is particularly important for learners to have a chance to gather their thoughts.
- ☐ Give at least a 10-minute break for every one hour of engagement (i.e.- Facilitate for 50 minutes and have a 10 minute break per hour). Suggest a physical break for learners (e.g.- stretches, grab a drink)
- ☐ Use an online timer to keep track of the break (e.g. https://www.online-stopwatch.com/countdown-timer/) Load the timer into the browser and share your screen so that learners are aware of how much time is left during their break.

- At the end of a workshop, ask some poll questions to ensure learners have understood the basic concepts of the session. Questions can be taken from evaluation survey for each topic (i.e.- assets evaluation survey).
- If time allows, ask participants about online facilitation feedback.

After the workshop:

- Take a few minutes after each workshop to reflect on some successes and struggles.
- If there was an administrator, agency host or cohost, ask them for feedback.
- Make a goal of doing one thing differently to improve your delivery for next time.