Some Ideas for Facilitating Groups Remotely

When facilitating group discussions remotely (eg using Zoom, Teams, etc) many of the skills needed are the same as when facilitating groups in the usual face-to-face setting. There are many resources which discuss skills for facilitators, including some ideas on my website: https://damiankenny.co.uk/facilitating.html

Here, I offer some ideas which may be helpful when facilitating a virtual group using Zoom, Teams, etc.

Using Names

If the facilitator asks a general open question, or invites general participation, it is common that participants are reluctant to contribute. However, they are much more likely to contribute when the facilitator invites an individual to participate by **using their name**. If the whole group know that each person will be invited to speak in turn, then they are usually happy to contribute. Participants can 're-name' themselves so that their preferred name appears against their video picture.

During a session, there may be several times that the facilitator wishes to invite participants to contribute their ideas, and it works well to **invite participants in a different order each time**. For example, the first time could be alphabetical, the second time reverse alphabetical, the third time starting in the middle of the alphabet. Any method could be used, so long as participants are invited in different orders, so nobody feels they are always asked first, and nobody feels they are always left to the end.

Another technique is to invite one participant to share their ideas, and then ask that **participant to invite another participant** to go next. After sharing, this participant invites the next participant, and so on until everyone has contributed. Everyone is then using names, which helps to make everyone feel comfortable and encourages sharing and interactions between participants, not just replying to the facilitator.

It is not always necessary for everybody to respond to each question/item. If the order in which they are invited is always different then everyone will have the opportunity to share something during the session.

Getting started

Sometimes people are initially reluctant to speak, and it can be helpful to start off with a 'round robin' of brief sharing in response to a simple, easy, opening question. If the first question is not at all threatening or controversial, then it is easy for everyone to share an answer. The main benefit is that **everybody has actually spoken to the group**, and so they are likely to feel comfortable when the discussion becomes deeper or more serious later in the session.

Indicating Request to speak

During a general discussion, sometimes there is a tendency for two or more people to try and talk at once. The facilitator can step in to invite participants to talk one at a time, for example saying, "could Ming speak first, and then Simon." Another technique is to ask people to raise their hand when they wish to speak, either their actual hand or by using a hand symbol on the computer app.

Using the Chat function

Sometimes it can be helpful to invite participants to make comments or ask questions using the 'chat function'. Some people may find this more comfortable if they have a sensitive question, or they are finding it difficult to be heard in a lively discussion.

If a group frequently uses the chat function during the discussion, it can be difficult for one facilitator to manage both discussion and chat at the same time. It can be helpful for a second person to monitor the 'chat' and mention relevant comments and questions at appropriate times. The second person could be a co-facilitator or one of the participants could act in this role (perhaps for a certain length of time and then hand over this 'chat monitor' task to another participant).

Become Familiar with some Technical Aspects of the App

Spending some time becoming familiar with technical aspects of the app (Zoom, Teams, etc) will enable you to feel more relaxed whilst facilitating the virtual workshop. For example, know how to display a list of participants, see chat comments, share content, do a poll, etc. If the facilitator does these things smoothly then more time can be spent on the learning activities rather than the technology.

Sharing content

Sharing a document, picture, PowerPoint, etc can aid learning. If the facilitator plans to use any of these tools, they should be made ready in advance of the meeting so that they are instantly available at the chosen time. It can also be helpful to allow participants to 'share content'; the facilitator needs to set the appropriate permissions in the app 'settings'.

When **sharing content** using the whiteboard, the facilitator can write or draw diagrams to aid explaining. If suitable permissions are given in the 'settings' then participants can also **annotate** the whiteboard.

One way of inviting feedback is to ask everyone to write something at the same time on the virtual whiteboard. Participants must firstly click on 'annotate' whilst the facilitator is sharing the whiteboard, and then they can write either using the mouse or preferably using the text facility. This is an easy and anonymous way of getting instant contribution by everyone, and it can be saved if required.

Setting Video on/off and Audio on/off

For some meetings (eg if mainly didactic) it is fine for participants to leave their video switched off. However, for interactive group meetings it is much more effective if everyone has their video switched on so that everyone can see everyone else and use visual cues to enhance discussion. The facilitator can choose whether or not to insist on video being on.

For all meetings, it is generally best that everyone has themselves **muted unless they are speaking**. This avoids distracting background noises and enables the person speaking to be more clearly heard. The facilitator can mention this at the start of the meeting, and can also monitor who is muted by looking at the list of participants and the symbols next to each name.

Using Breakout rooms

Sometimes it may be helpful for groups to break up into smaller groups for a short time to enable easier discussion between a few people rather than the whole group. This can be done using the 'breakout room' facility which is a feature of some videoconferencing software programs. The facilitator can allocate people into each breakout room, or allow the program to do this randomly.

Repeating questions/comments from participants

Sometimes a question from a participant might not be easily heard by everyone else. It can be helpful for the facilitator to repeat the question/comment before answering or asking others to comment. It can also be helpful if the facilitator slightly reframes the comment/question to make it clearer, and thanks the participant whilst giving an answer/comment. A useful aphorism is **'thank, repeat, validate'**. For example:

Participant: "If the patient has two problems, do we deal completely with one before the second?"

Facilitator: For a patient with two problems, do we gather information and then discuss management for the first problem, and then repeat for the second problem? Thanks, that's a common scenario and it is useful to think about the order of dealing with problem A and problem B. One way is..."

More tips?

Please send me your own useful tips, so I can add them to future updates of this handout.