

1. How do you elicit and sustain productive engagement?

Much like face to face, but using different tools. First create a solid process. How do I want it to flow? Then make another pass –

Ken Homer – collaboration series in CA..Getting them into the container – screen, ears, fingers (and you have no control over who walks in the door, or phone ringing, etc.

People have a button to push to step away to take care of their own needs. Apply everything we've learned about facilitation we transfer to the virtual environment. You first need a good process and can do the same things, just doing it differently.

Inviting people to participate and being very open and supportive, be a good host.

What to do about clear multitasking...perhaps they are using mute and doing other things? (EM) It depends on the platform – if based for presentation like GoToMeetings or Webex, it's harder. A platform that has facilitation tools makes it a lot easier. People will absolutely do other things and get caught at it...will have to confess. Laugh about it and move on. People wise up over time. Just repeat the question, as you now have their engagement.

When people ask, can you hear me? (use applause) Or check in – smiley face if okay, confused face if need to slow down, thumbs down if need to stop and deal with what's going on.

EM: additional moderator answering chat questions helped in something I was in recently. Is it distracting or frustrating?

LDC: Yes. It is for some people. Better to do everything in twos. Otherwise you are totally tapped out trying to watch everything on the screen at one time.

EM: if presenter looks at the questions and stops and reflects, it's hard for the group to stay engaged.

LDC: When being the moderator, can send questions to presenter to pay attention to in a different color to make it easy for the presenter

2. How do you design a virtual meeting?

To think about designing, think about a puppy or dog who goes around and around before lying down – same with virtual design. Start with the intents. Think about the group, their technical skills, visuals you may want to use, comfort with technology, something to do before session or after the session. Then start to lay it out – can mindmap it out. Transfer to little sticky notes on a big sheet – begin to sequence them, making notes about visuals that will help.

Then take it to PowerPoint, building the visuals and thinking about the activities. Then another pass to be sure to add more interaction. Write up a script, especially the opening and closing – maybe not every word, but to have clarity about what I'm doing at every point.

Then practice it in the virtual classroom, usually twice, checking how it feels in the body, then make adjustments as needed.

Use it like a story board – what’s the visual on the screen, what’s my part in this, and what’s the interaction. So design first, then visuals, and then come back to several times on the interaction. usually takes three good long passes to get it down. The visuals trump all other senses.

Added question: what tools really work for you?

Polling, multiple choice questions, or yes/no question. May show a video and then do a whiteboard (like a virtual flip chart) – example “the power of vision” (1 ½ mins) -- do an ORID type questions. Will comment on them via the chat and the whiteboard, giving the mike to them and leaving it open for people. Then it gets really quiet – tell them up front to take advantage of the quiet and facilitators sit on their hands and wait until someone picks up the microphone. Someone will, and then it catches on. It’s a learned skill to live with that silence. And it’s longer than in a F2F.

Don’t pack in as much as you would in a face to face environment – the technology actually slows you down.

Amount of time to design?

At least twice as long, but if something brand new, even longer.

3. What resources have you found most helpful?

Illuminate is the most efficient platform – emoticons, chat window, voice, whiteboard, polling, touring, etc. The emoticons make a HUGE difference and the facilitator needs them to understand what’s going on. Invite people to use them and they will, so you have clues what to do next.

What’s the learning curve for Illumintate? As a presenter, more than others. Need a moderator who knows the platform. New people who are fascinated by it don’t facilitate it very well. The learning curve is more than for most platforms but the payoff is HUGE. For participants, a live workshop takes about an hour and for people, they teach them ahead of time how to use what’s there. Then in the session, allow a little extra time, remind them of what’s about to happen – you will be doing something different...the hour upfront makes all the difference and without it you wind up focusing on the technology and not the content.

EM: How long have you used and loved Illuminate?

LDC: Using it for about 3 years. Hope no one takes it away from me and I’d be lost. I was in GoToMeeting today, but most of the time I’m calling in from a distance and everyone else is in the room. THIS highly limits engagement. They need to be in front of their own computer. Otherwise, it REALLY slows the work down. I don’t want to use those tools.

EM: Do people keep it upgraded?

LDC: Yes, it's been upgraded since I bought it in October. And new things on the back end, podcast out of it, video podcast (haven't used them yet) and Illuminate Plan is great. Came out of educational arena.

Illuminate has “three for free” access fully functional except for recording. This is a great way to learn it.

And they have many recorded teaching sessions – very brief and you can get a PDF file of it. And there are online people for real help. They train moderators and (? some other role). They do technical assistance from the virtual classroom.

Other resources? Nancy White is the best, the one I look to. She is witty, funny, charming and very smart. Also being in Illuminate training sessions has taught me a lot. One book is by Ruth Clark *The New Virtual Classroom*. I love that one (of several she's written). Helps you understand what's happening with the brain, ... (didn't get the rest).

EM: Sheila LeGeros and I were in Atlanta with Nancy White. Even her blog, newsletters, are helpful, well-written and brief. Re Ruth Clark, the book on using graphics virtually is really good.

4. How do you accommodate a variety of learning styles in your virtual facilitation?

This is always tough – in F2F and in online. Doesn't get easier. It's the paradox you live with. One thing is to slow down. Extraverts will want to grab the microphone. Introverts will be in the chat room chiming in, but not on audio. (Brain science says you can't multi-task, you can only jump back and forth really quick.) You translate the live session to the virtual environment – perhaps use a virtual flip chart, have them draw, give quiet time, etc. to address all those needs.

Session time that works? No more than 90 minutes because it's as long as people can be in front of the computer without taking a break. Have done a 3-hours session, but took a healthy break and had many things going on, break-out pieces, etc.

Recommend 90 minutes and take healthy breaks if you are going to have people come back.

5. What criteria do you use in choosing tools for virtual facilitation?

See Resource section above. It depends on what I want to accomplish, my intention, and number of people in the room; the level of their expertise (are they comfortable with technology, brand new, or a mix – and if a mix, enough with comfort to help each other). And on what I want to know – something on white board, or chat, or polling – and mix them up so people are doing something different as you move through.

Re numbers in the room? 200????

Have never had more than about 120. It gave me shivers. Most in Illuminate was 80. It takes more work. you need more moderators, someone to help people having trouble. You will do less of the whiteboard activities because it goes very slow. So with more than 25, or than 50 for sure, stay with polling, chat, emoticons – much more controlled because higher numbers change the dynamic – becomes more of a presentation. In non-Illuminate platforms, you are highly limited

with what you CAN do. In Illuminate, you do things really quickly. The chat there is harder to use because all talk at once and it flies. It's wild with a lot of people.

End of meeting documentation in Illuminate?

I do it at the end of every session. Save chat in a text file. Save whiteboards (in addition to the presentation slides). As a matter of practice, I take a screen shot of the participants. I can see all 25 names (my copy limits me to 25).

What kinds of follow-up are usual with your participants?

People will use the chat information. Some will have a web-based session after the event with a couple of questions, wrapping it around as a form of follow-up. And this lets people bring some form of summary to it, using the "what did you take away from this?" types of question. The session can also be recorded and kept at the website.?

6. What else do we need to know about virtual facilitation?

The whole idea is to translate as much as possible of what we do in the F2F environment into the virtual. We are about to try the World Café dynamic in Illuminate.

7. What do you find most critical in choosing tools for ToP Virtual Facilitation? (ToP only experts)

Have done some things like the workshop method – put things up on a whiteboard and move them around, as the moderator. And you can turn participants into moderators. They can easily move their own stuff around. It depends on the size of the group and the amount of stuff you have on the screen. Ask people to choose a certain font size, maybe choose a color. Maybe we could choose a time and play with creating the sticky wall dynamic.

Haven't really done ToP methods specifically inside Illuminate (other platforms aren't nearly as flexible). Yugma is one, very much like GoToMeeting, but they have a few other things. Not facilitation tools, but presentation tools. Most platforms out there aren't designed for facilitation and learning. Don't know what Nancy White's favorite platform is. We need to find out. She's a member at CPsquare. She uses asynchronous stuff, and also voice and chat together. Audio can get dicey with international work – use a bridge that allows both bridge call and Skype AND chat. Some can only listen and use chat for their responses.

What about mobile learning devices?

I'm playing with it. Haven't built any apps yet. I have a colleague in Washington, DC who is building apps. Anyone with a smartphone for sure (web accessible) – it's moving in that direction in a big way?

8. Who are other experts we might want to contact?

In addition to Nancy White and Ruth Clark (author) – Ken Homer in San Rafael, CA. Will send his email. A masterful facilitator. Has developed some of the best process questions I've ever run across. And he developed the idea of getting people into the space and being comfortable, more than just looking at a screen.

9. What other critical documents, articles, books or resources should we read?

Not many tech resources out there. Peter Block's work has a lot to do with the virtual environment because the principles there, when applied to a virtual environment (creating a sense of belonging and being a part of something bigger), will result in much better results.

Ruth Colbin Clark and Chopeta Lions, © 2004 re the visuals. Another was an ASTD speaker from PA, Professor Karl Kapp *Gadgets, Games, and Tools for Learning* – now working on games in three dimensions (Second Life, etc. that real gamers play). These kids have never not known anything else. He talks about gamers 1.0, 2.0, 3.0 etc. And it includes mobile devices – a related, but different direction. Colleges around the world are doing course work on cell phone.

NOTE: Ester Mae and LaDonna are soul mates re their love of books!!

Need to add LaDonna to Huddle.

LDC: I still do a little F2F with some clients, but most of my work is virtual. And I really appreciate the opportunity to reflect on this.

Later, spoke with Sunny re use of Illuminate with CADCA staff – train all over the world. Very “illuminating” to work with this project. They bought a full version with unlimited seats.

AND one of the things that helped me learn about the engagement piece was social media – Facebook, Twitter – it really changes how you think about things. For example, it's something people need training on, because there is the public piece AND there is a way to have things private as well. Things LaDonna puts online she puts in creative commons and only asks it get cited and not charged for. Doesn't know if license can be put on stuff there.

Do you want it in a project management system (like maybe Huddle). Or use content management stuff like Moodle (can stand it up on your own server). Like for courses, very flexible.

Ken and LaDonna worked up a sheet that explains the distinctions between Webinars and “Interactionars” (service marked it). So people would have clear guidelines.