

Virtual facilitation toolkit

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Welcome

Are you an experienced facilitator who is struggling to adapt your services in the time of COVID-19? Are you a novice convener keen on facilitating virtual experiences for your community? Whoever you are and wherever you are in the world, **welcome from ChangemakerXchange!**

We are a global community of young social innovators, co-created with [Ashoka](#) and the [Robert Bosch Foundation](#), and we have a wealth of experience facilitating off- and online gatherings (cf. section [Our experience so far](#)). That's why we have created this **virtual facilitation toolkit** to share all our tips and best practices with other impact-focused organisations when it comes to facilitating online gatherings.

We hope this toolkit will strengthen your virtual facilitation superpowers and enable you to host online transformative experiences for your team and community!

The ChangemakerXchange Team

Table of contents

Welcome	1
Table of contents	2
Our experience so far	2
What is virtual facilitation?	4
Facilitation basics	4
Our learnings	7
Meta-level tips	7
Tips on pedagogy	7
Tips on tech	10
Tips for facilitators	10
Tips for participants	11
Tips on time, participants, energy, and attention management	12
Time and participants' management	13
Energy and attention management	13
Tips on roles	15
Tips on the agenda	17
Check-in (and breaking the ice)	17
Framing	19
During the gathering	20
Breakout rooms	21
Polls	22
Wrapping up	22
Tips on accessibility	23
Additional resources	24
Questions or feedback?	25



Our experience so far

Since 2012, ChangemakerXchange has been facilitating unique, intensive, and intimate 4-day “unconference” gatherings in Nature for young social innovators, focused on human connection, peer-learning, wellbeing, and collaboration. Our community counts 800+ members all across the world! Over the years, we have also hosted a range of virtual gatherings, from small-group bonding huddles to large-group co-creation activities.

- **COVID-19 collective action summit:** In April 2020, we gathered 100+ changemakers from 55+ countries and 10 changemaker communities for a [two-day virtual summit](#) to share knowledge, expertise, and tools to fight COVID-19.
- **Virtual co-creation summits:** In December 2018, we convened up to 80 young changemakers online to brainstorm and decide on key strategic questions for the ChangemakerXchange community.
- **Virtual local co-creation summits:** In December 2019, we piloted a hybrid model for offline and online co-creation summits which engaged over 110 young changemakers across 10 locations from Beijing to Kigali and saw them dialling into one Zoom plenary.
- **Virtual peer-to-peer accelerators:** Throughout 2019, we ran a six-month digital peer-to-peer accelerator for young changemakers to receive expert input as well as brainstorming solutions to each other’s challenges.
- **Virtual incubators:** Throughout 2019, we partnered with [Bridge for Billions](#) to provide a selected number of our changemakers access to their 12-week digital incubation programme that matches the changemakers with a corporate mentor.
- **Virtual community huddles:** We have been hosting many community huddles, webinars, and information sessions for our community members on various topics, from systems change to wellbeing and fundraising.

Let’s work together!

This toolkit shares a lot of the knowledge and experience we have gathered over the years that we are happy to share with the world. If you are interested in taking your virtual facilitation to the next level, we would be happy to explore collaboration opportunities to support you with:

- **Guidance** on how to pull together a virtual convening; and
- Trained **virtual facilitators** from our Global Facilitation Pool.

To request more info on how we can support you further, please email us at info@changemakerxchange.org. We would be more than happy to set up a call with you and explore different collaboration opportunities!

What is virtual facilitation?

Virtual facilitation may seem mysterious and intimidating, but the first and most important thing to acknowledge is that **it is still facilitation**, just in a different space.

This means you should still pay attention to all the core elements of face-to-face facilitation, such as **space**, **people**, and **process** (more on these in the [Facilitation basics](#) section below). In fact, facilitation principles such as holding a safe space, fostering trust and bonding among the group, managing the participants' energy, varying the activities based on different learning styles... are just as crucial – if not more! – for virtual convenings.

At the same time, it is important to consider certain **technical elements** that require you to adapt your content to the online format. In the following sections, we have tried to outline all the principles, best practices, tips and tricks when it comes to virtual facilitation. Please note that most of the tips are based on using the online meeting platform [Zoom](#).

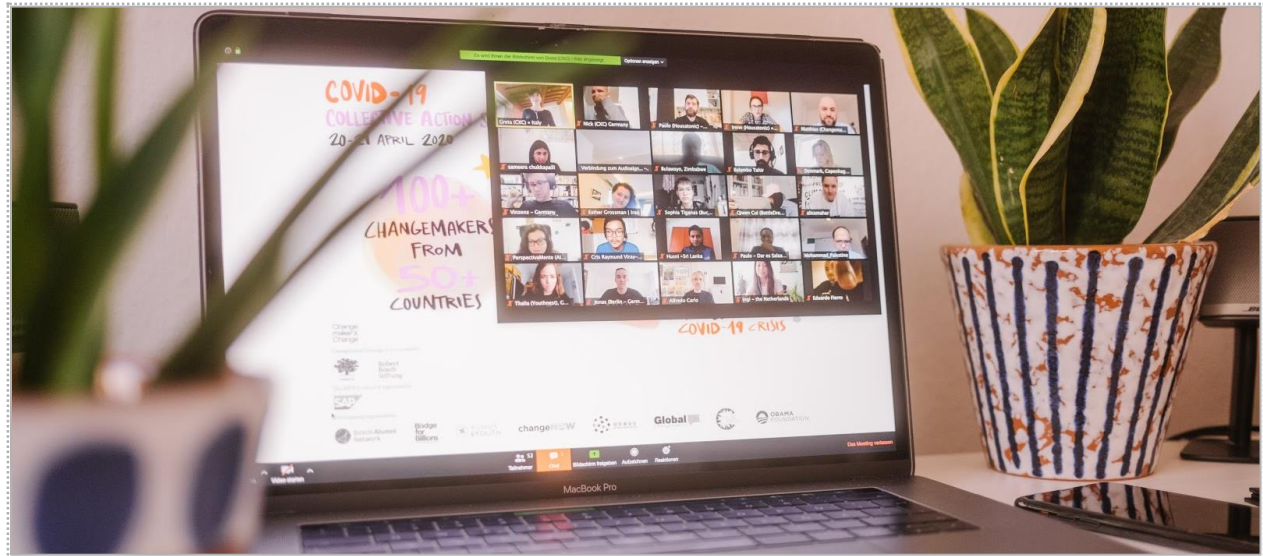


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Facilitation basics

We assume you already have prior facilitation knowledge and experience so this section is just a brief refresher on **three interconnected levels of facilitation** you should consider (both for off- and online convenings). If you have no prior facilitation experience, we strongly encourage you to do some thorough research to develop your basic facilitation skills and competences. For instance, check out the [Art of Hosting](#), which offers regular facilitation training and covers all the main facilitation techniques and practices.

Let's now look at **space**, **people**, and **process** facilitation.



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Space facilitation: Consider the **settings** and the **environmental factors**. Though you have limited control over these in virtual gatherings, you can ask participants to join the call from a quiet place (and most importantly, with a strong and reliable Internet connection!). Also, breaks are important as people's concentration online is more easily distracted. If you can't give long breaks because of time constraints, a 3-minute breather to drink some water, go to the toilet, or get a breath of fresh air can still achieve a lot. Finally, if relevant, please inform your participants in advance of specific requirements when it comes to dress code or eating rules (i.e. is it okay if someone shows up in their pjs or eats their meal during the event?).

People facilitation: Consider three elements – **emotions**, **relations**, and **involvement**. Because you are not there in person with your participants, it may be more difficult to understand their emotions and what they are experiencing during the virtual gathering. So, it's even more important you find other ways to get a pulse on the group, e.g. by doing more frequent "mini check-ins" (thumbs up / down) during the virtual gathering. When it comes to relations, the atmosphere might be quite different depending on whether your participants know each other already or are total strangers. But in any case, it's important you state from the beginning a few rules you'd like them to respect when it comes to interacting with others (e.g. safe space, active listening, openness and vulnerability, not taking too much space...). Finally, though it is a bit more difficult to enact, it is important to involve your participants as much as possible. Use the chat to gather their questions, remarks, or comments; ask them to raise their hands to answer certain questions of yours; divide them in small groups to allow for deeper bonding and sharing... Don't forget you are creating a

space for them to connect, learn, and collaborate, rather than a space for you to listen to the sound of your own voice!

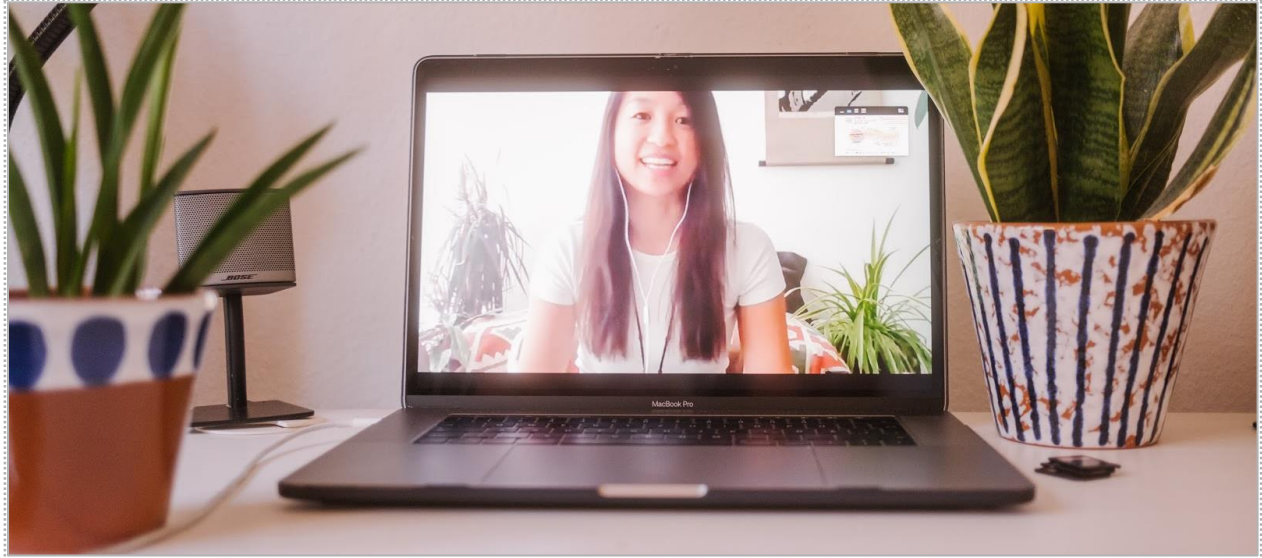
Process facilitation: Consider three elements – **information**, **operations**, and **energy**. As a virtual facilitator, it is essential that you provide the group with clear and concise information, at the right time and in the right format. For instance, make sure your participants know how to join the virtual gathering and if they need to prepare anything in advance; introduce the flow of the gathering at the start and share tips on how to use the platform you've chosen for the gathering; and be clear on the next steps and follow-up process at the end of the gathering. This is linked to operations and making sure that your virtual gathering runs smoothly – do you have all the necessary technical equipment and material for your activities? Finally, you're also responsible for managing the group's energy. Whilst each participant is responsible and accountable for their own engagement in the virtual gathering (something you should remind them of), you can do a lot as a virtual facilitator to maximise the learning experience through the programme flow. The best thing you can do is to plan the programme well in advance with the support of your co-facilitators to ensure you have a well-designed flow that avoids energy drops. But remember to keep flexible and adapt your activities if you sense the group needs something different from what you had planned for.

That's the basics covered – let's go into much more detail now!



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Our learnings



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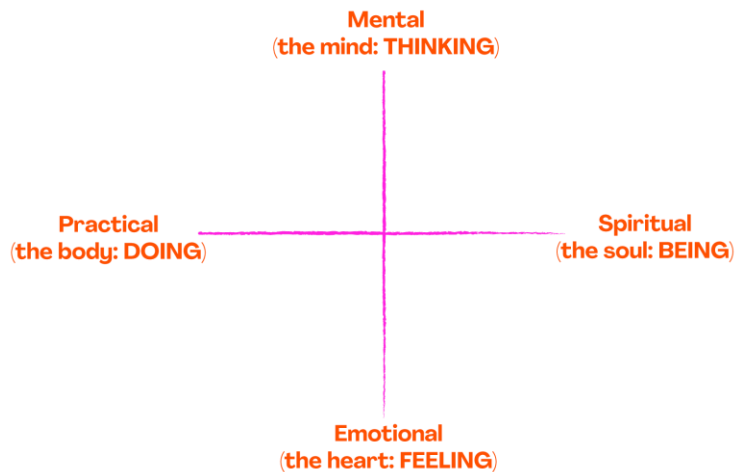
1. Meta-level tips

- Virtual facilitation requires **more effort and thoroughness** in the preparation and follow-up processes than an in-person meeting. On average, you might expect it to take 2-4 hours to prepare a well-facilitated, 1-hour session. And if you are planning a long virtual gathering (e.g. one-day long or more), consider splitting it into separate days to avoid overwhelming your participants and enabling them to stay fully present (maximum 5 hours of screen time per day).
- Non-verbal communication cues and physical tools are not available during virtual convenings, so it is even more important to have very skilled virtual facilitators who can **read the energy of participants through digital means** and know how to keep them engaged and interested.
- It is therefore even more important to **be very intentional** about the atmosphere you want to create for your participants, as well as the objectives you want to achieve – both in terms of how the virtual convening ties to your strategy and in terms of the outcomes for participants.

2. Tips on pedagogy

Your participants have **different learning styles** so you should diversify your activities to ensure (as much as possible considering the purpose and topic of the virtual gathering) you accommodate

all learning styles. In our experience, the **PEMS model** is a useful tool that recognises four different ways in which people relate to the world that influence how they are most likely to engage and learn.



- **Practical:** Doing, taking action, testing, prototyping. People with a practical preference like action and movement and learn best through doing. In a virtual gathering, formats like open space or world café are suitable for practical learners.
- **Emotional:** Relating, making friends, getting to know the people around you. People with an emotional preference feel everything and everyone and place huge importance on sharing feelings. In a virtual gathering, check-ins, check-outs, and small group bonding activities are suitable for emotional learners.
- **Mental:** Thinking, discussing, using facts, creating models and systems. People with a mental preference like to analyse, debate, and discuss – to the smallest of details. This is the easiest to accommodate in a virtual gathering and actually most of the time, it is the only learning style taken into consideration.
- **Spiritual:** Being inspired, seeing the bigger picture, asking “why”. People with a spiritual preference look for the greater purpose in things and learn best when they feel a task has significance. In a virtual gathering, take some time to explain the bigger picture and get buy-in from your participants (or give them the chance to share their concerns and doubts).

Moreover, as you plan your virtual gathering, we invite you to **empathise with your participants** by putting yourself in their shoes. What are their expectations towards this virtual convening? What is their level of expertise about the topic? What do they want to learn and what do they need to experience? What is your learning style and how do you avoid imposing your learning style on your participants? Here are a few additional tips offered by the [Virtual Communities for Impact Toolkit](https://www.changemakerxchange.org) to help you cater for different learning styles:

- If relevant, use **visuals** while speaking (for the spatial visual learners). You might consider bringing on board graphic recorders and live scribes to make your visuals look top-notch (more on this in the [Tips on roles](#) section).
- Include **quick exercises**, **hands-on examples**, and signs that people can use to show their approval or disapproval (for kinaesthetic physical learners).
- Share **pre-readings** and **written summaries** or invite participants to join a shared editable document to take notes or add their questions, comments, and remarks (for linguistic verbal learners).
- Use **videos** or **music** to bring a message across or allow for smaller discussions where participants can digest and repeat the content (for the auditory-musical aural learners). We encourage you to choose your music in advance and test the audio-sharing functions, so you do not waste precious time and energy.

Finally, consider where participants are at when they join the virtual gathering: What time zone are they dialling in from? Would it make sense to host the same call at different times to ensure everyone can join at a “decent” time rather than at 6:00am in the morning or 11:00pm at night? What is their native language and how confident are they with the chosen language for your virtual gathering? Where would you like to “land” your participants by the end of the meeting? If possible (and applicable), you may consider sending out a quick survey to your participants before the virtual gathering to find out more about their learning styles. But if this is not possible, it is safe to work on the assumption that your participants will have different learning styles and so it is important to vary your approach and activities.



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3. Tips on tech

Before discussing all the tips for creating a great agenda for your virtual convening, let's address one of the **biggest sources of stress** for virtual facilitators: **tech!** This is partly due to the fact that many elements are out of your control, but we believe there is still a lot you can do to prevent or mitigate tech hiccups. As mentioned in the section [What is virtual facilitation?](#) at ChangemakerXchange we use the online meeting platform Zoom. This means some of our tips below are applicable to Zoom but may not be applicable to other online meeting platforms. Zoom offers [various plans and pricing options](#) so check out which one is the most suitable for your virtual convening.

Tips for facilitators

- Depending on the type of your virtual gathering, the size of the group, and the complexity of the activities, you may want to have a **team of facilitators**, each with a dedicated role (cf. the [Tips on roles](#) section).
- Make sure you have a **strong reliable Internet connection** and quiet surroundings.
- **Test your tech before the call** to make sure your image and sound are as clear as possible. Remember to check your camera, microphone, and light. Also, practice using the chosen platform to make sure you know where everything is: e.g. access the list of participants, open the chat, change view layout, share screen or present slides, record the session, form breakout groups, etc. There are a lot of features available on Zoom, so we invite you to

spend some time playing around to activate the most suitable features for your virtual gathering. One important thing to note is that only one person can share the screen and the audio at the same time.

- **Use the chat** to share the guidelines for the activities you would like participants to do (especially before creating the breakout rooms) as well as sharing key insights, links, resources, etc. You can also use the chat to send a private message to a participant, checking in with them, offering support, answering their questions, etc.
- **Avoid zoom-bombings** (which is when uninvited guests join your call and take advantage of the screen-sharing feature to broadcast shocking imagery to all your participants) by deactivating the feature whereby all participants can share their screen. When you start your call, click on the arrow next to the screen-sharing icon in the toolbar and change the setting to “only hosts can share their screen”. And don’t forget you can also remove a participant if it comes to last resort (to do this, click on the “Manage Participants” icon, go over the name of the toxic participant and click “remove”).
- Be aware of your **participants’ privacy** in the time of GDPR! There are a lot of features you can activate on Zoom, from protecting your meeting with a password so that participants need both the meeting link / meeting ID and the password; to disabling the “join before host” option to avoid uninvited guests from interfering and to activating the “waiting room” feature before your meeting starts. Read this [blog post](#) for more tips.
- **Extra perk:** Did you know that Zoom allows you (and your participants too) to choose a virtual background? It might add an element of playfulness to your virtual convening. Imagine you have a space-like background and you’re calling from your sofa! Click on the arrow next to the camera icon in the toolbar and open the virtual background settings.

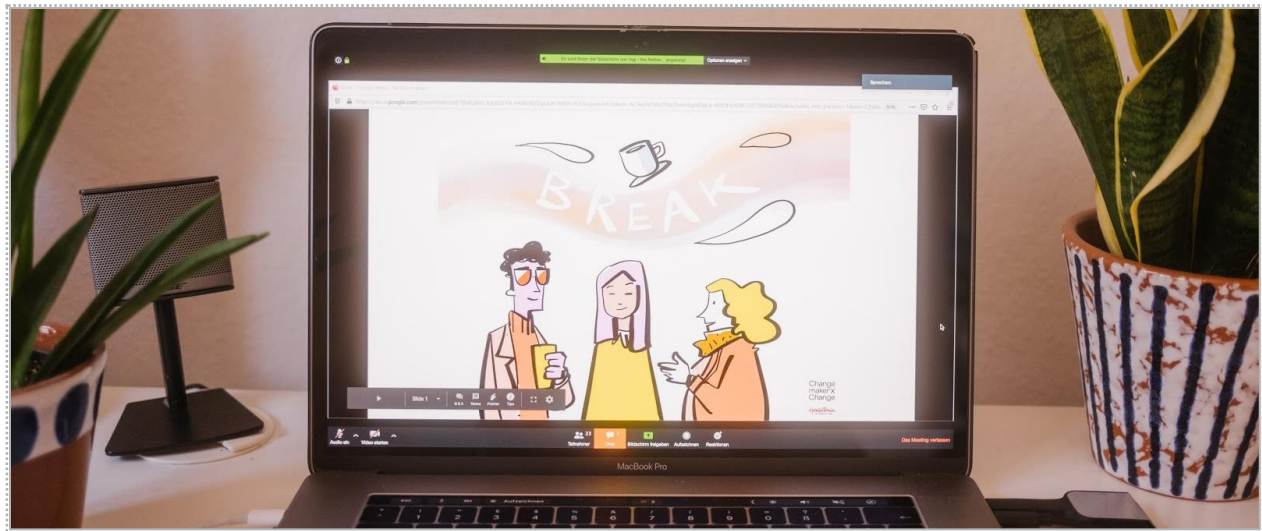
Tips for participants

- Ask participants to **download the application before** (or any relevant plugins) and test their tech before the call.
- Ask participants to **rename themselves** by clicking on the “Participants” tab and then on their name (you might ask them to also add the city/country they are calling from). It’s important their names are visible to everyone, especially to you so you know who’s in the room! If anyone is struggling to change their name, you can do it for them as a host.
- Ask participants to please keep their **microphones on mute unless they are speaking**. This is obvious, but there are always a few who don’t mute it and it creates a distracting background noise for everyone. If necessary, proceed and mute the participants yourself (though bear in mind they might not be able to unmute themselves afterwards as you need to do it for them). You may also want to consider “muting” all participants when they join the call. You can either log into your Zoom account, go to Settings and tick “Mute participants upon entry” or when in the call, you can click on the “Manage Participants” icon

in the toolbar and then right below the list of participants, you find the options to “unmute/mute all”.

- Ask participants to **occasionally look into the camera** to create the feeling of being seen and directly spoken to.
- However, ask participants who don’t have a strong reliable Internet connection to **turn their videos off** as this increases the speed and quality of the connection. We know it’s nice to see everyone’s faces, but it’s most important you can hear them and they can hear you.
- Invite your participants to **switch their view layout** between speaker’s only and full group to see all the other participants in the call (top right corner).
- Ask participants to use **hand gestures** to react even while they are on mute, which is especially recommended in large groups. For instance:
 - Thumbs up for “I agree” and down for “I disagree”,
 - Raising one hand for “I would like to ask or say something”, and
 - Raising and moving both hands for “I resonate with what you said”.
- **Use the chat** to encourage participants to write their questions or comments in the chat, as well as engage with each other via the private messaging function.

4. Tips on time, participants, energy, and attention management



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Some of the tips included below have been inspired by the [Virtual Communities for Impact Toolkit](#).

Time and participants' management

- Before your virtual gathering, **identify points in the agenda that could be shortened** if you are running behind schedule. It is important that you do not put time pressure on your participants.
- **Always start and finish on time.** Extra brownie points if you finish a couple of minutes early; participants always appreciate that!
- Be clear with your participants on whether this is a **drop-in / drop-off call** or whether it is mandatory that they join from the beginning to the end. If it's the former, consider a contingency plan for those who join late. For instance, you may agree on who in the hosting team takes care of writing a private message to late comers to welcome them and catch them up with what is happening in the call. If it's the latter, then you may want to consider "locking" your Zoom call, which means no new participants may join in, even if they have the correct link or meeting ID. When in the call, click on the "Manage Participants" icon in the toolbar and then right below the list of participants, you find the options to "lock" the call.
- **Be kind but strict with the group.** For instance, if a participant is taking too much space, thank them for their input and remind them and the group about the principles you set at the beginning, and then invite others to share. Alternatively, you might communicate a specific time limit per comment, e.g. maximum one minute, which makes "interrupting" people who take too much space easier as you can refer to the time rule. You may also want to have signals that the time is up, e.g. a bell that rings or you start weaving and other participants follow you... You can make it fun, but it's best if you communicate this at the beginning of the meeting (if relevant).
- **Use your time wisely.** For instance, if you are speaking in front of the whole group, try to keep your presentation no longer than 10-15 minutes at one time as participants' concentration starts to fade after this. On the other hand, if you divide participants in breakout rooms, give them at least 15-20 minutes; less than this and they either some people won't have the chance to speak or their conversation will stay at a superficial level, not reaching the depth you are looking for. This is very important because it's easy to run over time with your presentation and then decide to cut their breakout room time – please resist the urge too!

Energy and attention management

As we explored in the [Facilitation basics](#), you are responsible for the participants' overall energy during the virtual gathering. This means you should first and foremost check on your own energy levels because if you are feeling drained or exhausted, it is more likely that you will struggle to sustain the energy level of your group. Moreover, you must also learn to read the energy level of your participants, which can be difficult if they don't have their cameras on, are multi-tasking

during the call, or checking their phones. Here are a few tips to help you retain participants' attention and engage them.

- **How big is your group?** The size of your group will impact participants' level of engagement. Usually, small groups allow for more participation, as long as you foster trust, so participants feel safe to expose themselves to the group.
- **How often do you engage the group?** We already mentioned not to speak for more than 15–20 minutes at one time but even when presenting, try to engage your participants every few minutes.
- **Do you listen to the group?** When you are not speaking, do you really listen to your participants or do you pretend to listen while you prepare the next activity? Active listening is key for all facilitators. It's always a good idea to refresh your active listening skills, so here is an [activity](#) for you to practice.

Now, despite your best attempts, some participants will get distracted and disengaged. Remember not to take it personally – it happens to all of us that we get distracted so be kind to your participants and provide them with ways to bring their attention back to the group. It's a bit like mindfulness meditation: our mind wanders off but instead of judging ourselves because we got distracted, we acknowledge the distraction and gently bring our awareness back to whatever we were focusing on. **How can you get a sense of whether your participants are not engaged?** Here are the most common signs:

- They turn off their videos (unless they do so because their Internet connection is not stable). You might even want to ask them to turn them off at specific times to give them a break from having to look into the camera at all times, which can be pretty exhausting.
- They have a somewhat fixed stare or gaze, meaning they are probably responding to an email or doing something else (we all do that at times and we know that despite our best efforts to hide it, it's impossible to!). You might want to gently remind them that multitasking takes up a lot of energy in the brain because it is constantly switching from task to task and this scatters their focus and reduces their productivity as much as 40%.
- You ask a question and no one responds (unless the way you formulated the question is confusing so always make sure to be clear in your delivery!).
- You only get a few responses to a poll question.

If you sense that not just one or two participants are disengaged, but that the whole energy of the group is dropping, adopt one of the following **coping strategies**:

- Ask participants to **stand up and stretch** their bodies quickly.
- Give them a **short break** to get a drink or snack (or just some fresh air).

- **Change up your delivery methods** if you notice you're giving them too much input and not enough time to process, digest, and feedback on the content.
- Add **more breakout conversations** to get people to talk to each other in smaller, more intimate groups.
- **Check with your participants** on how they would like to use the remaining meeting time to make sure it's valuable for everyone. Don't be afraid of cutting the meeting short if there's no energy for it!

For more insights into the so-called “Zoom fatigue”, check out this article [“How to combat Zoom fatigue”](#) published in the Harvard Business Review.

5. Tips on roles



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We find it helpful to have **five main roles** when it comes to hosting a virtual gathering. Please note this doesn't mean you need five different people – one person can fill more than one role! And most importantly, you need to find what works for your team. Feel free to allocate the different roles and responsibilities in a way that makes you most effective.

- **Main facilitator:** This person is in charge of the overall flow of the event and the facilitation of its activities, as well as welcoming participants, setting the frame, handing over to their co-facilitators, wrapping up the call, clarifying the next steps, etc. When they are not facilitating, the facilitator can also share their insights and observations to help participants work through a collective process more easily. And they might support the tech host, e.g. by sharing the screen instead of them or replying to private messages from participants if the tech host is sharing their screen.

- **Co-facilitator:** This person (or people) facilitates specific parts of the agenda and they will be welcomed and given the word by the main facilitator. The main facilitator should brief them carefully and request from them any slides they wish to use, so they can share them with the tech support host and make sure everything is in place. When they are not facilitating, the co-facilitator can also share their insights and observations to help participants work through a collective process more easily. Like the main facilitator, the co-facilitator might support the tech host, e.g. by sharing the screen instead of them or replying to private messages from participants if the tech host is sharing their screen.
- **Tech support host:** This person is responsible for the meeting's technical elements, including breakout rooms, polls, slides, etc. They will also take care of answering incoming questions in the chat, as well as checking in with participants via the private chat function to provide one-on-one support without distracting other participants. This includes welcoming late-comers and bringing them up to speed with the gathering's flow and activities (we encourage you to do this via the private chat function to avoid creating distractions for the other participants). Please note that whilst the tech host is sharing their screen, it is more difficult for them to also answer to the private messages and trouble shoot for participants, so make sure the other facilitators support the tech host!
- **Energy keeper:** This person pays special attention to the mood of the group and their energy levels. This role can be filled by a participant as well and they are tasked with noticing when the energy drops and an intervention may be required, e.g. "I notice our energy has dropped and I wonder if we need a quick energiser or break..."
- **Harvester:** This person documents the essential insights and decisions that emerge from the group process. They make sure to capture learnings and insights in a meaningful way so that it can be shared with participants during the call (e.g. to recap the process made so far), as well as distributed after the call.
- **Graphic facilitators:** This is *optional* but it is a real added value to your team and to the participants' experience. Consider bringing graphic facilitators, visual recorders, or live scribes on board to help you: (1) prepare "digital flipcharts/slides" (before the gathering), (2) capture the conversations among participants (during the gathering), and (3) visualise the insights and takeaways from the event (after the gathering).

6. Tips on the agenda



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6.1. Check-in (and breaking the ice)

It is good practice to start your call by welcoming your participants and doing a quick check-in to **allow participants to “arrive” into the meeting**, break the ice, and be fully present with each other. The same way as you leave your baggage on the side when you check-in at an airport or hotel so that you may enjoy your trip or stay, check-ins serve the purpose of allowing participants to distinguish between mutual space and personal space and decide what heavy luggage they want to leave behind. Your check-in will vary depending on the size of the group and the time allocated for it (some online huddles have the sole purpose of allowing participants to check-in, in which case the entire call is dedicated to just that!).

Here are several suggestions for different types of check-ins:

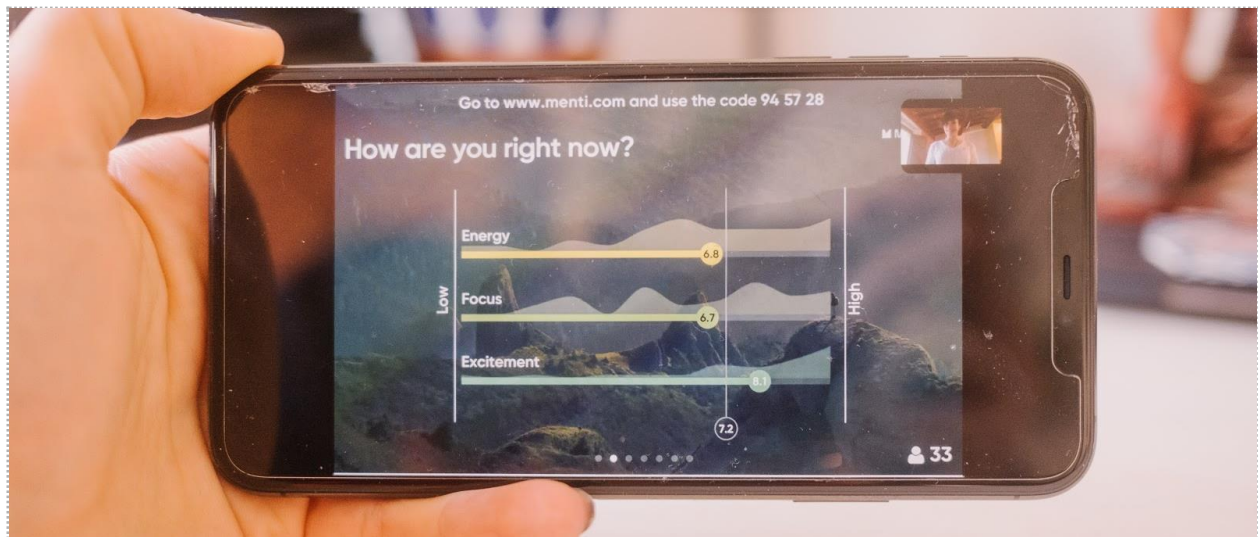
1. **Medium or large groups:** If you have a medium or large group (say 10+ people) and a relatively small amount of time for your check-in (say 10 minutes), there are different possibilities to conduct your check-in are: (1) use [Mentimeter](#) and set up an interactive presentation, (2) use a Zoom poll, or (3) share a check-in prompt and ask participants to answer in the chat (either by writing spontaneously or by typing the answers BUT waiting before hitting the enter button until you tell them to do so). See point 3 for sample check-in questions.
2. **Small groups:** If you have a small group (say fewer than 10 people) and a relatively small amount of time for your check-in (say 10-15 minutes), you can ensure a bit more interaction

with and engagement from your participants. For instance, you can ask them a question and invite them to (briefly!) share their answer one by one, popcorn style (this takes longer though), by nominating the person who will speak after them, or by providing a list with the speaking order.

3. **Check-in questions:**

- What emoji describes your mood right now?
- What is alive for you as you come to this session?
- Why is it important for you to be here today?
- If you were a weather system, what would be your report?
- What are your expectations towards this session?
- If you weren't on this call, what would you be doing?
- Give an example of something you've done this week that you're proud of.
- If you could eat any dish right now, what would it be?
- What is the first word that comes to mind when you think of this topic?
- One-breath check-in (i.e. only speak for the duration of one breath).
- On a scale from 1 to 10, how... confident are you about this topic?

4. **EQ check-in:** This is a [check-in](#) around emotional intelligence and it can work both for small, medium, and large groups and it can be adapted for quick check-ins or expanded for longer check-ins.



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5. **Short meditations:** Another way to help your participants feel more grounded into the call is to guide them through short mindfulness meditations or visualisations. Below are a few suggestions for you to try out, but make sure you are comfortable leading this type of activity (also make sure you speak with a relatively soft and gentle tone and that there is

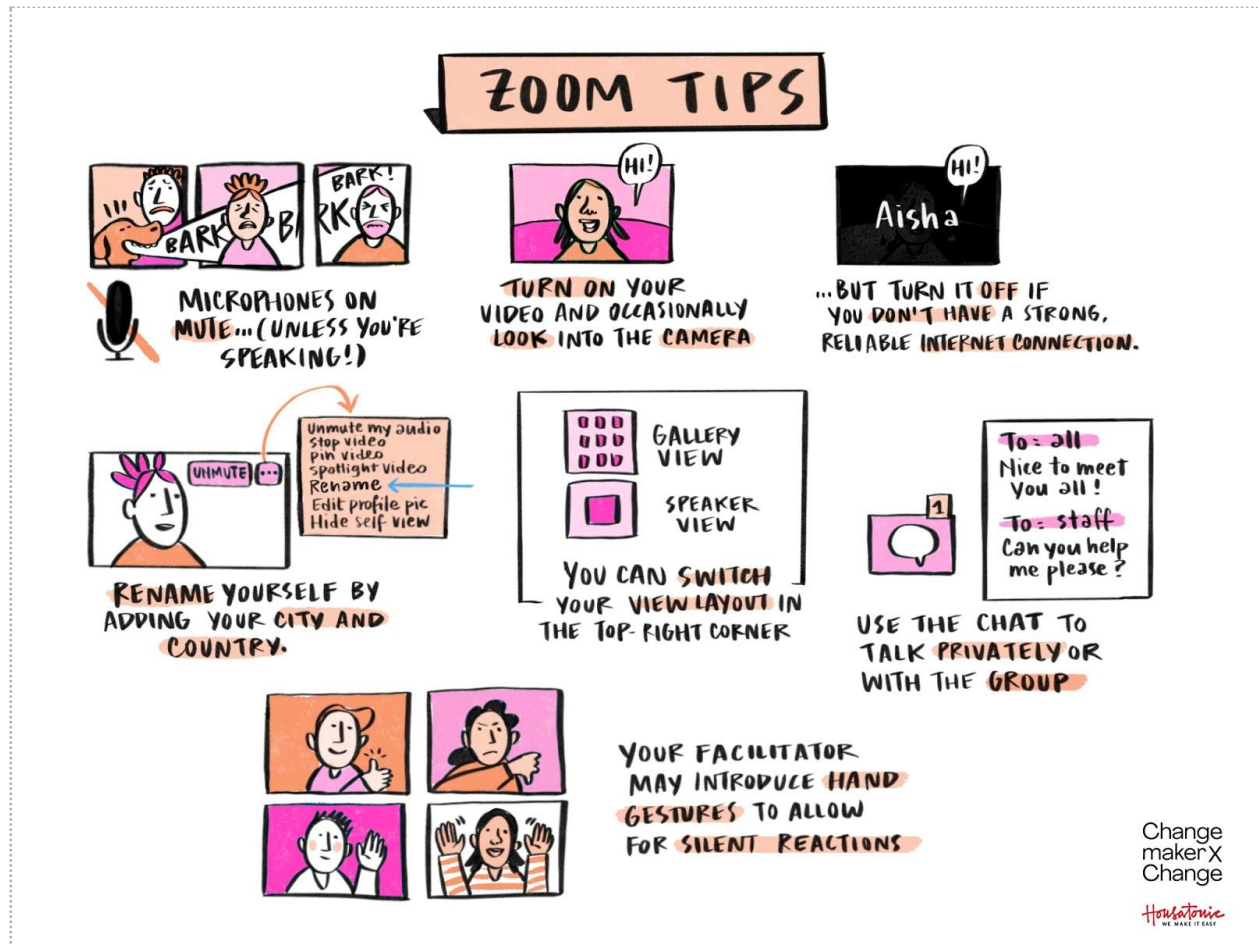
minimal background noise in your surrounding otherwise you risk distracting your participants).

- a. [4-7-8 breathing technique](#)
 - b. [Body scan meditation](#)
 - c. [Colour-breathing meditation](#)
 - d. [Heart-breathing meditation](#)
 - e. [Mindful check-in](#)
 - f. [Morning intention setting](#)
 - g. [Simple breathing exercise](#)
6. **Sketching:** A fun and creative way to break the ice at the beginning of a virtual gathering is to ask participants to sketch their neighbour to their right on Zoom. To make it even more fun, ask participants to divide their sheet of paper into four and draw their neighbour: (1) In the most realistic way; (2) Without lifting the pen/pencil off the paper; (3) With their non-dominant hand; and (4) With their eyes closed. The results will be surprising in many cases (you can also have them guess who they were drawing – but beware of your timings!) and it will bring some laughter in the group right from the start.
 7. **Two truths and a lie:** Ask each participant to write down three statements about themselves, one of which should be a lie. Each member says their statements and the others vote for which statement they think is a lie. Then reveal the correct answer.
 8. **Take a picture of...** To build personal rapport and bonding, ask your participants to snap a photo and share it with the rest (either via the chat function or by turning their phone to the camera – unless you're using a platform like Mural where you can add pictures to the board). Choose one specific category, such as: the room you are calling from, your shoes/socks, a view from your window...

6.2. Framing

After the check-in, we suggest you give a clear framing for the virtual convening. Below are a few topics you may wish to cover in your framing:

- Overall flow and agenda (what is going to happen?).
- Clear objectives and outcomes (why are we gathered?).
- Ways in which they can contribute (how can you contribute?).
- Functionalities and principles of the virtual space (how do we run our event smoothly?) – see section 3 [Tips on tech](#). Remember that for some people, this might be the first time they attend a virtual meeting and use that particular online meeting platform so it's important to give them a quick tour around the space. If helpful, here is a [digital flipchart with the main Zoom tips](#) we created for one of our virtual summits.
- Get their permission to record the session (if applicable).



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We then suggest you begin your meeting with a short breakout session that allows participants to connect in small groups of 2-4 people by introducing themselves and answering a general question such as: Why are you here? Why are you really here? Why is this topic relevant for you? This is unless you've already dedicated some time for small group interactions during the check-in.

6.3. During the gathering

We already covered many tips in earlier sections, but the most important reminder is to engage your participants regularly and in different ways. Below are a few suggestions:

- Keep your presentation time to an absolute minimum.
- Use breakout rooms as much as possible (and as much as appropriate given the topic of your virtual gathering).

- Invite participants to use the chat feature to ask questions, make comments, share concerns, etc. and engage with other participants via the private messaging function.
- When inviting your participants to share in a large group or plenary session, use a mix of popcorn style (spontaneous contributions) and choosing specific people who might not otherwise volunteer.
- If the energy is low, do a quick energiser – for example, ask people to stand up and take a stretch or give them a short breather to get some fresh air.
- Give participants a screen-break from time to time and invite them to turn their video offs and just listen to you (or whoever is speaking). This is important because staring at a screen for hours is exhausting and draining.

6.4. Breakout rooms

Breakout rooms are a great feature to split your group into smaller subgroups and allow them to have a **more intimate time to bond deeper**, have meaningful conversation, learn from each other, and brainstorm creatively. Here are a few tips:

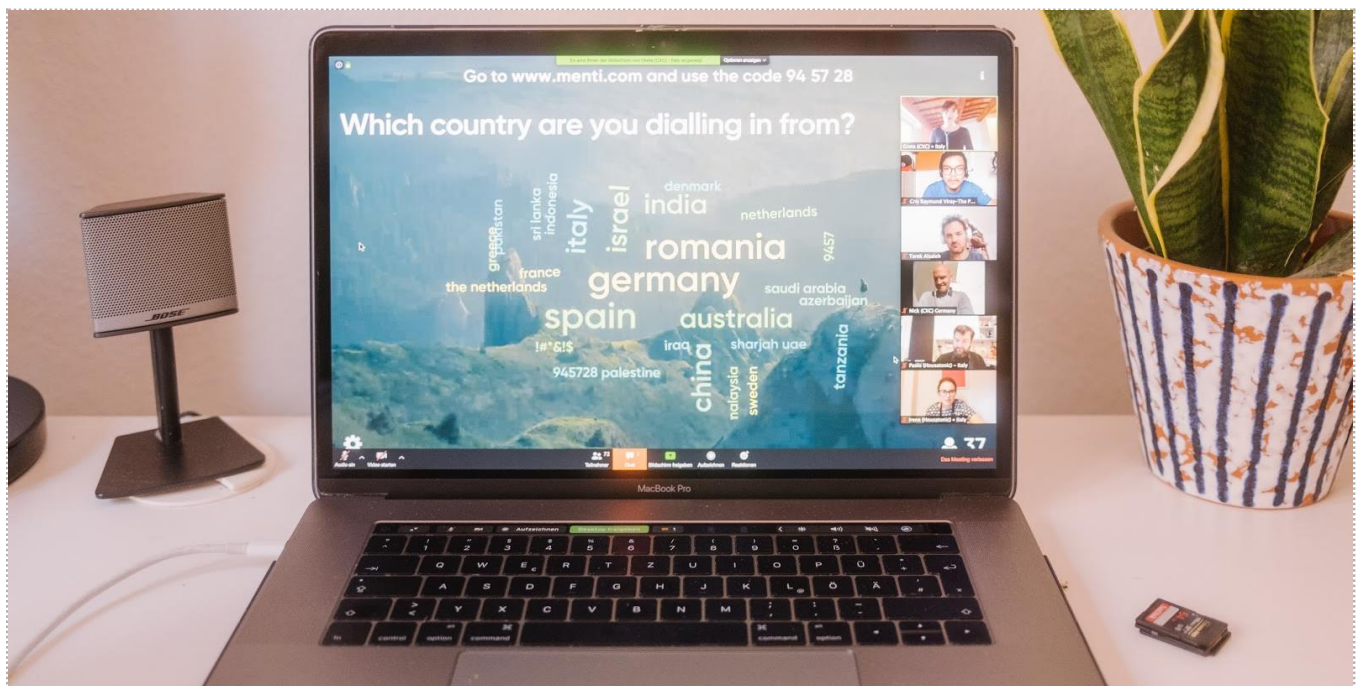
- You have **two options to split your participants**: in a random order (automatically done by Zoom) or manually (if you need a particular configuration). If opting for manual allocation, please allow for a few minutes to do this so you might want to have your tech host prepare the breakout rooms while you introduce the guidelines for the activity.
- The **ideal time is 15-20 minutes** – anything less than that is pointless (unless you are using it for a quick check-in/check-out) whereas more than 20 minutes is possible but should be facilitated.
- **Involve participants** as much as possible (and applicable) in the creation of topics or themes for each breakout room.
- Explain that once you open the rooms, a window will pop up and they need to hit the **confirm button to join** their breakout room. If for some reason they get disconnected and return to the main room, they should be able to see a “breakout rooms” icon in the toolbar which will enable them to re-join the room you have assigned them to.
- If possible, assign **one facilitator per breakout group** (who are briefed prior to the call on the guiding questions). If it’s not possible, ask the group to choose a volunteer who will then report back the main takeaways from their conversation (based on the task). Make sure they are clear on where to collect their notes.
- **Keep it simple** – be clear in your guidelines but don’t provide more than 2-3 guiding questions otherwise it becomes confusing.
- Mention the **“ask for help”** feature (before you split them into the rooms) in case they need the support from one of the facilitators.
- **Trust the group** to be able to self-manage and make the most of the breakout room.

- **Visit the rooms** to make sure they are alright (don't interfere unless needed).
- **Broadcast messages** from time to time to remind people of the prompts, how much time they have left, and anything else you might want them to do before returning to the main room.

6.5. Polls

Polls are a great way to **get an immediate pulse of the group** on something you are discussing, exploring, sharing, especially for large groups. If you choose to conduct a poll, remember to:

- Use a simple provider, e.g. Google Forms or [Mentimeter](#).
- Keep the poll anonymous to avoid any GDPR implications.
- Prepare them in advance!



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6.6. Wrapping up

Returning to our baggage analogy (cf. section [Check-in](#)), it is good practice to host a quick check-out to allow participants to add something new or relevant to their bags, so they go away feeling more enriched. We always recommend doing a check-out, but this is especially crucial for virtual gatherings that last 1.5 hours or longer or that involve the sharing of important information. Your check-out will vary depending on the size of the group and the time allocated for it.

Here are a few suggestions for different types of check-outs:

- **Medium or large groups:** If you have a medium or large group (say 10+ people) and a relatively small amount of time for your check-outs (say 10 minutes), there are different possibilities to conduct your check-in are: (1) use [Mentimeter](#) and set up an interactive presentation, (2) use a Zoom poll, or (3) share a check-in prompt and ask participants to answer in the chat (either by writing spontaneously or by typing the answers BUT waiting before hitting the enter button until you tell them to do so). For instance, you may ask them to type in the chat what the biggest takeaway from the session is, what they enjoyed about the activities conducted, what will be their next step...
- **Small groups:** If you have a small group (say fewer than 10 people) and a relatively small amount of time for your check-out (say 10-15 minutes), you can ensure a bit more interaction with and engagement from your participants. For instance, you can ask them a question and invite them to (briefly!) share their answer one by one, popcorn style (this takes longer though), by nominating the person who will speak after them, or by providing a list with the speaking order. Here are a few sample questions: How are you leaving this day / session? What landed for you that you take away with you? If you were a weather system, what would be your report now after the meeting? If you were a colour, would it be different from the one mentioned in the check-in and why? One-breath check-out (i.e. only speak for the duration of one breath).

After the check-out, briefly bring the virtual gathering to a close by summarising the main takeaways, actions, and follow-up steps and by thanking your participants for joining you. Make sure you recognise your participants and their efforts by showing appreciation for their time, energy, and contribution to the virtual convening.

7. Tips on accessibility

You may have participants with different disabilities so it is important you do your best to create a safe space for them to be fully included in your virtual gathering.

- **Physical disability:** No particular concerns, but if you decide to do an energiser that requires movement (e.g. stretching), choose simple moves that can be performed sitting (e.g. neck, shoulders, arms, hands stretches).
- **Blind or partially sighted:** Ask everyone who speaks to always introduce their name before speaking so it is easier for the participant with a visual impairment to recognise who is speaking. If possible, avoid using slides, or if using them, make sure to describe carefully what's on the slide (so instead of saying, "As you can see from the graph in the slide..." say, "This slide shows a graph that describes XYZ..."). Also, minimise the non-verbal guidelines you require participants to follow (e.g. hand gestures) as it will be difficult for your participant

with a visual impairment to know what is going on. Finally, if possible, provide the participant with the main talking points of the virtual gathering before the event so they can use a voice-reader to prepare themselves ahead of the call.

- **Deaf or partially hearing:** Provide the participant with the main talking points and as much of a script as possible (at least for your presentation) before the event so they can read it and prepare themselves ahead of the call. During the call, you can nominate a person (e.g. your co-facilitator or tech support host) to be in charge of the closed caption writing. You can activate this feature on Zoom. Unfortunately, Zoom does not allow for automatic captions but if you don't need breakout rooms, you may consider using Google Hangouts Meet because this platform does have automatic closed captions available. It's not 100% perfect, but it's pretty good!
- **Learning disability:** No particular concerns but make sure you give clear guidelines (you might repeat them as well) and to give enough time for people to reflect without feeling rushed or put on the spot. You can also give examples of possible responses to your prompt.
- **Autism Spectrum Disorder:** People with A.S.D. might struggle with abstract, metaphoric prompts so opt instead of more direct questions or use visual materials as prompts (e.g. slides with images).

Consider assigning a member in your team to be available to provide extra support for participants in need, e.g. sharing their contact details with the participants so they can reach out to them if they need extra support or help.

Additional resources

Below you can find a few useful links with extra resources and tips:

- CoCreative: <https://www.wearecocreative.com/tools>
 - [4 agendas in collaborative innovation](#)
 - [6 patterns in collaborative innovation](#)
 - [Different levels of engagement and collaboration](#)
- Liberating Structures: <http://www.liberatingstructures.com/>
- The Commons • Social Change Library: <https://commonslibrary.org/online-meeting-guides-to-get-you-through-covid-19/>
- Virtual Communities for Impact: <https://communitiesforimpact.org>
- WeDialogue: <https://wedialogue.mykajabi.com>
 - [Mastering the Art of Online Hosting](#)

Other platforms you may want to use are:

- Airtable: <https://airtable.com>



- Hopin: <https://hopin.to>
- Jitsi: <https://jitsi.org>
- Meet: <https://meet.google.com>
- Mentimeter: <https://www.mentimeter.com>
- Miro: <https://miro.com>
- Mural: <https://mural.co>
- Sli.do: <https://www.sli.do>

Questions or feedback?

We will keep refining this document to keep improving it but if you have any questions, suggestions, or general feedback, please get in touch with us at info@changemakerxchange.org.

HAPPY VIRTUAL HOSTING!

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