Protection Information Management

Tip Sheet for Designing and Delivering Online PIM Trainings & Learning Events

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The PIM Training Resource Pack has been used across the globe to provide trainings and learning events by trained PIM champions and practitioners. Given the situation created by COVID-19, these are increasingly being delivered online. This Tip Sheet provides some (non-exhaustive) advice for organising PIM learning events remotely, mostly using webinar platforms, based on initial experiences from PIM champions. For any further guidance or to share your experiences, please contact pimtraining@drc.ngo.

1. Content Preparations

It is important to adapt the content and delivery modalities of the PIM Training Resource Pack to the context of an online platform. The modules cannot be delivered with the methodology indicated in the Pack, as there is less time available and fewer opportunities for interaction with and between participants compared to in-person trainings. Here are some things to consider as you think about content:

- **Define the purposes, outputs and outcomes:** As a first step, engage with the requester(s) of the PIM training (and participants as applicable) to generate a clear and shared understanding of the purposes and desired outputs of the PIM learning event. This is essential to manage expectations and ensure that the training is designed to meet those expectations. Consultations should also scope the number and profile of participants, the resources and time available for the training(s), potential facilitators, and any logistical issues (e.g., connectivity, time zones, languages, etc.).

- **Know your audience** to choose the modules**:** Does your audience already know PIM? What are the main challenges? Which competencies require strengthening? It can be useful to conduct a training needs assessment (via a short survey) to identify the learning needs of participants and the specific challenges that the PIM Framework might be able to address. You may also wish to take the opportunity to inquire about which PIM categories they want to cover (if the requester is unable to scope this).

- **Prioritize:** Do not try to cover the entire Training Pack in one session, but rather prioritize content with the requester/participants and spread out the training into multiple sessions. Regardless of priorities, it is recommended to always cover the foundational elements, i.e. the PIM definition, PIM Principles, PIM Process, and PIM Matrix in Module 1.

- **Less is more:** Do not try to pack in too much content into a given event/session. It often takes a bit more time to deliver content in reality compared to what is planned, and participants may start an important discussion that you do not want to cut short. Let the agenda breathe so there is space for these exchanges. To keep participants engaged, it is also important to ensure enough time is planned for activities and interactive moments.

- **Focus on the key messages**: Remember that the PIM Training Pack provides key messages and learning objectives for each module. Let these guide you as you think about how to adapt the content to online delivery. Regardless of the approach, these key messages must come out clearly during the presentation or be the key take-aways from exercises.

- **Build in variation**: It is said that "Variety is the spice of life". Each session should be designed to combine theory, practical applications, concrete examples, and moments of interactions with and between participants (see below).

- **Integrate** several modules into one session: Think about how key content from different modules can be combined in a useful and meaningful way. For example, one session can include the PIM definition, the PIM Process and the PIM Matrix. In a second session, you can combine the modules on Protection and on IM and bring in the PIM Principles to explore how these can be applied to guide the work of these two functions.

- If you are conducting a PIM training over multiple sessions, try to build moments into the agenda where you can **remind** participants of the main objectives of the training and the basics of PIM. This is ideally done at the beginning of the session, e.g. by asking participants who joined a previous session to summarize the key messages for others or by integrating a quiz.

2. Ideas for Designing Interactions with Participants

Once you know which topics/modules you will cover, you can think about how to design the webinar in a way that enables the engagement of and interaction with participants. This is both about *adapting the exercises* from the PIM Training Pack to an online platform and about building *moments of interaction* throughout the webinar. In all cases, the design of the exercises/interactions should be guided by:

a. The key messages and learning objectives in the modules of the PIM Training Pack. These tell you what you are trying to achieve with the exercises/interactions.

b. Practical considerations such as the time available, the number of participants, and the functionalities of the online platform you will use.

Some ideas:

- Think about **combining** different formats for the webinar, especially if you are doing a series, e.g., a plenary session with Q&A, individual or group presentations by participants, brainstorming sessions, group work, etc.

- Ask participants to do an exercise as **homework** prior to the webinar (either individually or in small groups) and use this as a basis for discussion during the webinar. (This allows you to frontload some of the interaction/collaboration before plenary sessions to free up time in your agenda.). Consider adding post-webinar learning activities as well. This can be useful to help participants reflect on what they learned during the session and allows for continued engagement with participants after the webinar.

- Share **handouts** before the webinar (as pre-reading), make them accessible during the session, and refer to them during the presentation.

- Integrate **stories** about how PIM is applied in practice, e.g. by asking participants with PIM knowledge and skills to share their experiences and practical examples during the session. (This must be arranged in advance and sufficient time must be allocated in the agenda.)

- Use the **chat function** to allow people to ask questions. Ensure a person in the facilitation team (not the presenter) is monitoring the chat and "raise hand" functions, so they can intervene if needed. [It is usually not recommended to allow participants to unmute themselves, as this can become difficult to manage (depending on the number of participants). The chat function or 'raise hand' function are good alternatives to allow participants to raise any pressing issue outside scheduled interaction moments.]

- If you ask participants a **question** (e.g., with the Whiteboard function in Webex), make sure it is simple, clear and precise. Do not ask questions that are too broad, descriptive, complex or difficult to understand. For example, ask "Which PIM categories are you currently implementing?", rather than "Which processes, roles and timelines did you use when creating your protection monitoring system?" The latter is too complex for an online interaction.

- Think about how to organize the **Q&A session** (as applicable), either within the presentation platform (e.g., via the chat function in Webex) or on a separate platform that is used before and/or during the event, e.g. Pigeonhole. As always, moderation is key to success.

- Explore platforms that offer various **interactive options** for polls, quizzes, group work, etc. (see below). Try them out to decide which one(s) would be most appropriate given the learning objectives of the module, and brainstorm how they can be integrated at different moments in the session.

- Ask the facilitators to turn on their **cameras** when they are presenting. This creates a more personalized environment and promotes the concentration of participants (who can both see and listen rather than just listen to a floating voice).

- Take caution when using **videos** in your webinar. Depending on the internet speed of the participants, they may or may not be able to follow. Use short videos of no more than 5 minutes. Make sure you can explain the key take-away if the video does not play.

- Find a **balance** between presentation and interactions. Exercises and interactions should always be purposeful and relevant to the key messages and learning objectives.

- Try to **centralise** the session on one or two platforms. Participants may end up feeling that the webinar is chaotic and disorganized if they constantly have to click to different platforms to fill in a survey or ask a question.

3. Logistical Preparations & Planning

- **Identify facilitators**: Identify facilitators with the relevant expertise to deliver the chosen modules. For a 1.5-hour webinar, 2-3 speakers would be ideal to create variation in style and tone for participants. Engage with facilitators early on and have preparatory meetings with them to develop the detailed session plan(s). Make sure that facilitators are familiar and comfortable with the platform used before the session.

- **Divide into digestible pieces**: Organize the agenda of the learning event into manageable pieces. It might be possible to cover the materials in one session, or you may need multiple sessions. We recommend that each session is no longer than 2 hours, and ideally 90 minutes. Multiple sessions should be spread out over the course of many weeks, e.g., 1-2 per week rather than 1 every day. If you absolutely must have a longer session, include a break in the agenda. Do not exceed more than 4 training hours per day. Following a webinar can be more difficult due to distracting activities in the environment and on the computer, so it is important to give participants space to focus on other tasks in between and around the training.

- **Assign roles and build a choreography:** Work with the facilitation team to design the choreography (flow) for your learning event and assign roles. These can include for example: main facilitator/host, note-taker, timekeeper, Q&A moderator, etc. It is good to divide and conquer, as these tasks are too much for one person. Develop a detailed session plan that states clearly who does what at each step of the session. You may also need to assign technical roles related to the use of the platform, e.g., who will have the host, panellist, presenter vs attendee role – and access to related functionalities. Make sure to identify back-ups for all roles and all presentation content as a contingency plan, in case someone in the facilitation team becomes unavailable before or during the event.

- **Choose a platform**: Choose a platform that has interactive features that meet your needs, such as chat, quizzes, polls, whiteboards, and break out groups. You should also check if the platform allows for recording, which can be useful if time zones are an issue or if you want to be able to share the event later. Check if the platform allows for different functionalities and access and user rights for facilitators vs. participants. Check with your IT support staff in case your organization has a corporate account. Make sure the platform you choose is accessible on different computers, browsers, and possibly also on phones.

- **Communicate in a timely manner:** Ensure participants are informed well ahead of time and know what to expect in terms of the purpose, the agenda, registration procedures, connection modalities, etc. Consider time zone differences and language preferences when communicating. Explore scheduling options with participants before finalizing a date, and bear in mind the wider context (e.g. do not plan a webinar in the middle of HNO season). If you are delivering multiple webinars and participants are in different time zones, it can be useful to schedule each webinar at a different time to distribute the burden (e.g., to avoid having the same people having to wake up early or stay late).

- **Send reminders:** A day before, and again about an hour before the webinar, send a reminder to participants and invitees who did not confirm attendance, so that they can still attend if they want to.

- **Prepare the slides:** The slides should contain key messages and should be easy to follow while you speak. Do not use complex visuals and infographics. Keep the imagery simple and easy to understand. Illustrate your slides with pictures when possible, as it is more visually engaging, and will stimulate participants' memory and concentration more than slides that all look alike. If you have multiple webinars, use images consistently to create predictability for participants, e.g., use the same icon to indicate a Q&A session. Use real stories about people (rather than processes) as practical examples to illustrate issues.

- **Prepare the script:** Use the Notes page to write-out the script. This helps to avoid any surprises with the timing and also supports the re-use of the presentation by others. However, write it out in a way that sounds natural, to avoid coming across as stiff or overly rehearsed.

- **Timing:** Assign time to each element in the agenda, after practising the script. This is the test to know if you will have time to deliver all the materials (including any discussion and interaction moments), or if you need to revise the content and/or its presentation. It is useful to approach the timing from a 'maximum' perspective, i.e., indicate the latest time by which you should have completed a section, so you know when you absolutely must stop and move on. (Of course, this should not be an issue if you have practiced and follow the script.)

- **Prepare questions** for the Q&A (as applicable): If you have a Q&A session, it can be useful to prepare a few questions in advance. The moderator can use these to kick-start the Q&A session if participants do not immediately have any questions to raise. It can help avoid awkward silences or lulls in the presentation.

- **Prepare a short survey** to allow participants to provide feedback on the webinar. The feedback survey can be sent after the webinar and added to the thank you note. Questions can be about e.g. time management, participants engagement, usefulness of and interest in the various topics, learning achievements, facilitation and presentation style, and suggestions for improvement. This is especially important if your webinar is the first in a series.

- **Plan for a communication channel** between facilitators: It is important for facilitators to be able to be in touch directly on a separate channel during the event, e.g., to trouble-shoot or adjust the agenda. Agree on how this will be done, e.g. via a Skype Group.

- **Decide on the location** from which you will deliver the training. Is your internet at home reliable? Are the neighbours renovating the kitchen? Should you reserve a meeting room at the office (if accessible)? Select the most quiet and reliable option.

- Check if it is better to upload your presentation or share your screen, depending on the recommended practice for the platform you have selected. Also consider internet bandwidth, as sharing screen in low bandwidth contexts may not allow participants to follow the presentation well.

- **Practice using the platform:** Make sure all the facilitators are familiar with how to access and use the platform. You can practice beforehand, request a training from experts, and/or watch tutorials. You need to be familiar with all the technical elements of the functionalities you plan to use.

- **Practice delivering the training:** Organize a **dress rehearsal**/dry run at least a few days before the event. You can practice interacting with the platform and handing the proverbial mic to other presenters, and confirm the timing, flow and choreography of the presentation. This does not require that the full event be delivered, but rather that each section and connection point be practiced, and that roles be confirmed. This is also usually an opportunity to identify issues with the functionality of the platform, which can then be addressed/resolved before the event.

- If you are planning to break the plenary into **small groups**, make sure you know how you will group the participants. If possible, make sure all groups have colleagues with different responsibilities to ensure a meaningful discussion and from different points of view. Be clear on who is responsible for starting the small group activities and for bringing everyone back to plenary.

4. Presentation & Facilitation

Prior to the learning event (on the day of)

- If you are presenting or sharing your screen, make sure that your desktop is clean and that any pop-ups and sound notifications are disabled, e.g. from your mail, MS Teams and Skype accounts. (Various platforms, such as Webex, may hide pop-ups automatically, but it is good to check.)

- **Log in** to the platform in advance: Make sure all facilitators are logged in at least 15-30 minutes ahead of the session to test sound and video and sort out any last logistical issues. Keep an eye for participants who are joining so you do not discuss any in-house issues once they are connected.

- Put your phone on mute (or vibrate – if you are using mobile messaging apps to be in touch with your facilitation team during the event).

- If you are delivering the event from a meeting room in the office, put up a “Do Not Disturb: Training in Progress” sign on the door. You never know if your colleague will decide to pop in and say hello.

- Use the Chat function to welcome participants and inform them that the event will start shortly.

During the learning event

- **Start on time**: Your agenda is built for a certain time period. If you start 10 minutes late, you will rush or cut parts – both reduce the value of the session and do not create a conducive learning environment. You can begin 2 minutes after the official start time to give time to participants to join, but we do not suggest creating further delays. Starting on time is also a gesture of respect to participants and can promote punctuality for the next session, as applicable.

- **Introductions:**
    - Introduce yourself and the facilitators, if possible, with cameras on, as it is more engaging for participants to put a face to a voice. You can also propose that participants turn on their camera to introduce themselves as the beginning of the session, depending on the number of participants and if the platform and internet connection allow it.
    - Introduce the agenda of the session, explaining the different moments of presentation and interactions.
    - Inform participants as to whether the session will be recorded.

- Do not read from the slides, but rather use them as a visual reference to illustrate the points with key messages.

- Not all participants will be comfortable with sharing experiences or starting a discussion online. Be prepared for this and know what you will say if there are no volunteers to participate. It can help to integrate short icebreakers into the session, to help participants feel more connected to each other.

- Ensure you **manage the time** well: Time goes by quickly, especially when you have interactive activities and discussions with participants. The timekeeper should be moving the conversation along to ensure that the content can be covered.

- **Moderate the Q&A** as per the approach that was agreed on. Ensure the Q&A remains engaging and ask participants to be concise in both the questions and answers.

- **Always pay attention**: You may find that you are distracted, e.g., if you start answering a question in the chat rather than listening to the presenters. You never know when the mic will be handed back to you to provide an answer or clarification, so always stay focused on the main presentation space.

- If you have breakout rooms for small group work, make sure there is at least one facilitator in every room. If possible, have someone going around the groups to make sure everything is working as planned. You should also have a plan B and be able to reassign people to other groups, in case there is a group that has a problem. Coordinate with the other facilitators to finalize and wrap up group work. Inform participants a few minutes in advance when the group work will end and ensure everyone joins the plenary at the same time.

- If you ask participants to present a part of the module or an example from their operation, make sure they manage their time and find a way to inform them when they need to wrap up. Sometimes facilitators will not look at the chat, so prepare a way to communicate with them or be ready to politely interrupt if necessary so they can wrap up their points.

5. Wrap Up & Evaluation

- Send a message to participants to **thank them** for participating. In the message, you can also share the presentation, the link to the recording (as applicable), the feedback survey (see above), and any relevant resources that were mentioned during the event. You may also want to provide answers to any questions that could not be answered during the Q&A session, due to time constraints or because follow-up was needed.

- **Organise a debrief** after each webinar with facilitators to debrief and share the findings of the feedback survey. Look at the findings together and agree on areas to improve. You can also discuss the planning process, the content selection, team communication and collaboration, the facilitation experience, etc.

- For a longer training/learning process (i.e. one that requires multiple webinars), it is recommended to prepare a **short report** with the purpose, agenda, participant list, survey findings, lessons learned and recommendations, and links to the presentations and recordings (as applicable).

6. Useful Resources

Tutorials

1. DisasterReady, *Conducting Live Online Presentations*, 2020
2. DisasterReady, *Creating an Engaging Webcast*, 2020
3. GoToWebinar Tutorial Channel
4. Zoom Tutorial Channel
5. Microsoft Teams Tutorial Channel
6. Webex tutorial

Tools

1. Microsoft Forms – A tool to create forms or quizzes; easy to insert in PowerPoint.
2. Webex – An enterprise solution for video conferencing, online meetings, screen share, and webinars
3. Zoom – A tool for online meetings
4. Bluejeans – A tool for video conferencing
5. Google Jamboard – An interactive whiteboard developed by Google,
6. AnswerGarden – An online platform to create word clouds with participants' answers.
7. FeedbackFruits – A suite of tools for blended and online learning
8. Pigeonhole – A tool for live Q&As, polls, quizzes, and surveys
9. Mentimeter – A tool for interactive meetings and real-time inputs with live polls, quizzes, word clouds, Q&As and more
10. Whiteboard – An online collective whiteboard (similar to Google Jamboard).

Articles

1. TechSoup, *10 Steps for Planning a Successful Webinar*, 2016 [includes a link to browse webinar platforms]
2. Olivia Mitchell, *18 Tips on How To Conduct an Engaging Webinar*, n.d.
3. Anne Hennegar, *Webinar Tips for Presenters and Attendees*, 2020.
4. Leiden University, *Top Tips for Remote Conferencing*, 2020.
5. Leiden University, *Remote Teaching: Choosing Your Tools*, 2020.
6. Leiden University, *Facilitating Discussions for Effective Online Learning*, 2020.
7. Leiden University, *How to Moderate Your Online Community*, 2020.