HOW TO FACILITATE ONLINE GROUPS

A ROUGH GUIDE TO HOLDING SPACE ONLINE

We believe in the power of face-to-face communication and now more than ever we need to be bringing people together to help us all Keep Calm, Stay Wise and Be Kind.

Online spaces can be quite different to real-world meetings, so we've put together this guide to help you through the technical and human pitfalls and opportunities. Whether you've been running groups for ages, or are just starting out, we hope it will help you.

- **HOW TO PREPARE MENTALLY**
  Core themes to consider before starting your group and to reflect on throughout *(Page 2)*.

- **HOW TO PREPARE TECHNICALLY**
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- **A-Z OF ONLINE FACILITATION**
  Helpful Tips we've picked up that help create great online spaces *(Pages 5-7)*.

- **FACILITATOR & PARTICIPANT GUIDE SHEETS**
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ACTION FOR HAPPINESS

HOW TO PREPARE MENTALLY

Reflect on these yourself by writing down your thoughts on each or by talking them through with your co-facilitator. We can never be perfect in practicing these, but active reflection helps.

KEY IDEA: Get yourself in the right space before you start

POSITIVITY: How will I make this space feel positive?

People are giving their time to join your group - make them feel positive about it. Online groups create listening, connection and inspiration and are a gift that can be offered in a spirit of generosity, collaboration and light-heartedness.

EMPATHY: How will I show that I care?

Having space to share our feelings and be heard is important and there are challenges to achieving this online (e.g. harder to read body language or emotions). Make it a priority to ensure there is enough time for people to share and that people know they are being listened to..

ENERGY: How will I keep energy levels up?

Sitting in front of a screen can become quite fatiguing over extended periods. With so many calls happening for many of us, they can easily become a bit of a blur. Keep sessions short, fresh (themes and content) and use regular breaks or physical exercises.

INCLUSIVITY: How will I support those that struggle?

Power imbalances (gender, race, age, class) are just as prevalent online and often more so. Who gets to speak first? How much time do they use? Who makes decisions? These questions get complicated further by varying levels of ability with technology. We need to positively mitigate this with clear ground-rules, proactive facilitation, simplicity and support for those who might be struggling.

HUMILITY: How will I create a positive relationship with failure?

We face a lot of unknowns when running online groups - things often go wrong and that's OK. When things don't go to plan, keep calm and be authentic. Let people see you are human and just trying your best. A good sense of humour works wonders too.

HOW TO PREPARE TECHNICALLY

Some tips on using features of Zoom that can be helpful to get to know.

KEY IDEA: Technology is there to help, don't let it become the focus

GET YOUR SET-UP RIGHT: If possible, use a laptop rather than a phone or tablet so you have full access to host controls. Use plug-in headphones and microphone if possible, to give the best possible sound. For good quality video, think about your lighting and background.

USE THE MUTE BUTTON: If everyone except the person speaking is on mute, it improves the sound for everyone. Tell people how to mute themselves (button at bottom left of screen) and use the mute participant/mute all buttons when needed.

MAKE SURE YOU CAN SEE EVERYONE: Zoom has two views which you can select via the button in the top right corner (or swipe left/right on a phone). Speaker View is where you just see the speaker. Gallery View is where you see everyone. Participants need to set this themselves - tell them how.

USE THE CHAT FUNCTION: The written group chat can be used for anyone to send messages to the whole group (useful for quickly collecting responses) or to send private messages (such as a discreet request or report to the facilitator). Let your participants know about this too.

BREAKOUT IN SMALLER GROUPS: Using breakout rooms can help people open up more and have more time to speak than they would in a large group. Using breakouts needs a good level of trust and instruction as the facilitator can only be in one room.

BROADCAST MESSAGES: When using breakout rooms (where you can only join one at a time yourself), you can use the Broadcast Message function to send a message to everyone in all the groups (e.g. 5 mins left, please pick a spokesperson to share for the group).

SHARE YOUR SCREEN: You can share many things on your screen - Powerpoint slides, YouTube videos, etc - to create some visual aspect to your sessions. If sharing video, tick the boxes to Share computer sounds and Optimize for full screen video clips.

WAITING ROOM: The Waiting Room means you can control who joins your sessions. When setting up your meeting, ensure Waiting Room is enabled (it should be the default setting). Then monitor the waiting room to let people in - and keep an eye on it in case people join the call late.

HOW TO INTRODUCE THE SPACE

Open the space by intentionally mentioning each of these aspects at the start of your session. Experienced groups won't need as much emphasis, but a bit always helps.

KEY IDEA: Collective understanding makes everything easier

OUTLINE: Let people know what to expect

It's really helpful to name the **intention** (why we have gathered), **context** (what's happening in the world right now), **theme** (what the focus of this session is), **content** (what we will do) and **timings** (how long we'll be together - suggestion 90 mins max) so everyone is on the same page together.

AGREEMENTS: Have rules that everyone agrees to

These can be suggested in advance by the facilitator or co-created by the group. Issues around confidentiality, sobriety, safeguarding and data protection are important to have collective agreement around, so set aside time to make this clear.

TRUST: Create a culture of mutual trust

Participants need to trust you as a facilitator (are you planning to record the session, has everyone consented?) and you can also let them know you trust them too. They are here entirely of their own choice; they can pass or leave as they need and they are free to focus on what works for them (while respecting the needs of others, including you!).

MODERATION: Let people know your role

A facilitator is there to get conversations started, keep things on track, monitor for people that need encouragement and help to model positive participation. Letting people know when you might need to 'step-in' (e.g. when a conversation goes off-topic, or when there is inappropriate behaviour) is important to gain their support.

PARTICIPATION: Explain how you'll work together

Online groups need clear methods of working together. People need to know how to 'take' the space ("I'm stepping in … I'm stepping out") and how to pass to the next person. Explaining this at the start of your session means you can check that everyone has all they need to participate (e.g. you might plan to use hand signals, then find some people don't have video).

A-Z OF ONLINE FACILITATION

Draw on the techniques below to create dynamic and meaningful spaces online. These have been collected from various experts plus our own experiences. Pick a few to work on at a time.

KEY IDEA: There are many ways to create engaging spaces online

(A) AUTHENTICITY: Don't try to be someone or something you are not. If you are nervous about the technology, or feeling uncomfortable, share this with your group - it shows people you are a human being doing your best, just like them.

(B) BEING SEEN: The more we feel that we are "seen" by others, the more we open up and engage with what is offered. With video available on calls we can notice when someone is looking like they are about to speak or give people more time if you see they are still writing.

(C) CO-HOSTING: Don't try to do it all alone! Between the technology and the facilitation there is a lot to juggle and it really helps to share it. Having a co-leader means there's someone you can chat to about the session and potentially cover if you are ill or away too :)

(D) DELEGATING: Don't be afraid to ask for help. There will be times when you are not feeling at your best, or have been holding the space for too long. Ask someone else to step in if you need to - people are often more ready than you might think.

(E) ENCOURAGING: So much richness and wisdom can come from people having the space to share their thoughts and feelings. The more we do to actively encourage people to share in a positive and safe way, the greater the benefits for everyone.

(F) FEELINGS: Checking in ("How are you feeling right now?") is really important in creating understanding and cooperation. Let people know that all feelings (but not all behaviours) are welcome and encourage everyone to really listen.

(G) GROUNDING EXERCISES: Exercises such as meditation or stretching/movement can be really helpful in getting people to settle together. Introduce these in your sessions to keep the energy up or create space after an emotional moment.

(H) HAND SIGNALS: If everyone has video, hand signals can include 'hands on heart' or 'open to the screen' to express compassion, 'waving' to agree or praise, 'hands up or down' for yes/no, 'raise finger' to speak, in shape of a T to ask a technical question.

(I) ICE-BREAKING: Online spaces can have some awkward moments when people join or come back from a break and nothing is happening. Fill these gaps with a fun question for people to answer in the chat, or by playing music for everyone to enjoy.

(J) JUDGMENT: As a facilitator you need to know what behaviour is (or is not) appropriate - and to be willing to take steps where necessary. This requires being brave enough to take a stand, including removing someone who is being disruptive or abusive out of a call if needed.

(K) KEEP FOCUS: Use your discretion as facilitator to interrupt where needed and bring things back. We all have limited attention spans and memories; repeated reminders of the question or purpose of the exercise can be helpful.

(L) LAUGHTER: Laughter can be very bonding and help to release emotional and physical tension. Getting people to move to music, or play a game can create some jolly chaos and give people a positive emotional boost if done with enthusiasm and lightness.

(M) MODELLING: How you are feeling and behaving will affect the group a lot. Make sure you are actively involved (e.g. by 'showing' not just 'telling'), following the ground rules ('walking your talk') and injecting some positive energy.

(N) NAMING: Naming what you notice happening in yourself ('I'm starting to feel concerned') or in the group process ('we seem to be having a misunderstanding') is the first step in moving through a challenging situation together.

(O) OPTIMISM: If we're not aware of our own limiting beliefs of what's possible with online groups, those limits will always be present. The more we can be open, willing and optimistic, the more exciting the possibilities and fun we can have.

(P) PLACE: Unlike a public group, people attend online groups from their home and will be impacted by that environment. They might fear being overheard, or might not even be fully dressed (!) - this is all new to many of us and we need to be flexible and supportive.

(Q) QUIET: Being together in silence is unusual online - but can be very powerful. At the start of our call, explain that silence is welcome so people feel less uncomfortable about it and maybe plan in some intentional pauses too.

(R) REHEARSAL: Trying your technology and exercises out beforehand can bring vital experience and identify potential issues up front. Why not gather some friends together first and try stuff out with them? Working with small groups before big ones is good practice too.

(S) STANDING UP: At the moment, lots of us are spending more hours of our days sitting than usual (especially if we are doing lots of Zoom/Skype calls). Encourage your participants to stand up for some or all of the call - it helps if you do too.

(T) TAKING TURNS: It's less easy to 'go around the circle' online. But one technique is to 'throw the tennis ball' where each person who speaks nominates the next person who they are throwing the ball to. It helps if you track who has spoken and ensure people don't get missed out.

(U) UNKNOWN: A lot can be unknown in online facilitation. We sometimes do not know how many people are going to be in the sessions, what people's technical ability is, or how people are feeling - being open to the unknown helps.

(V) VISUALS: Some people engage and learn best when there is something visual to respond to. Online we can provide this by 'sharing screen' to show slides or a video, or by just using our own camera and holding up diagrams or whiteboards.

(W) WRITING: Just because we are online doesn't mean we have to be talking the whole time. Written exercises are a great way to get everyone involved and give a bit of break in the conversation. You can ask participants to write on paper or to share in the chat online.

(X) EXHAUSTION: The current situation is really taking its toll on people and you may find them tired, impatient or even irritable. We can accommodate this by acknowledging the situation we find ourselves in and checking in properly.

(Y) YOUR SPACE: Remember that people are going to be seeing into your space. You might want to tidy things away or sit by a wall to maintain privacy. Also, you may want to think about lighting, camera and background to ensure you are able to be seen clearly.

(Z) MISTAKES: Everything that happens is an opportunity for learning - if something doesn't work, we'll learn from it. This doesn't have to be the place where a group solves everything and you don't need to be a flawless facilitator. Good enough is perfect.

Keep Calm Stay Wise Be Kind

GUIDE SHEET: ONLINE FACILITATOR

15 key questions to ask yourself when preparing to facilitate an online group

PREPARE MENTALLY
Get yourself in the right space before you start

POSITIVITY: How will I make this space feel positive?

EMPATHY: How will I show that I care?

ENERGY: How will I keep energy levels up?

INCLUSIVITY: How will I support those that struggle?

HUMILITY: How will I create a positive relationship with failure?

PREPARE TECHNICALLY
Technology is there to help, don't let it become the focus

SPEED: Is my internet connection good enough? Check at www.speedtest.net
Minimum: 1.5 MBps up and down. If too low, you may need to move closer or plug in to your router.

TEST: Are my video and audio working? Do a test call at http://zoom.us/test

CONTROL: Do I know how to use Zoom? Get help https://zoom.us/docs/en-us/covid19.html

CONTENT: Do my videos/presentations work? Test anything you plan to share beforehand.

BRIEF: Do my attendees know what to expect? Email the GUIDE SHEET to participants.

INTRODUCE THE SPACE
Collective understanding makes everything easier

OUTLINE: Have I explained what will happen?

AGREEMENTS: Have I set out rules that everyone agrees to?

TRUST: Have I mentioned and invited trust?

MODERATION: Have I explained my role in the group?

PARTICIPATION: Is everyone clear on how we will work together?

GUIDE SHEET: ONLINE PARTICIPANT

Helpful tips before joining your online group to ensure the best possible experience

CHECK YOUR TECH
Getting on top of the technology really helps

- **Get Zoom:** Install Zoom on your device (it's free) https://zoom.us/support/download
- **Test Call:** Before joining the call, make sure you've checked that your connection, audio and video all work http://zoom.us/test (note: using headphones can help).
- **Use Link:** Your group organiser will send you a unique link to join your group.
- **Join Audio:** When you join the call, you may need to activate audio to hear and be heard. You can find this option in the bottom left next to the microphone symbol.
- **Mute Audio:** We recommend you mute audio when not speaking. If you want to speak and your microphone has been switched off by the host, use the "raise hand" option.
- **Gallery View:** To switch between Gallery View (seeing everyone) and just the speaker or presentation, click the option in the top right corner (Speaker/Gallery view).
- **Your Space:** Pick somewhere to join the call that is comfortable, has good internet connection and has minimal distractions. Sit by a wall for a less busy background too.

KEEP CALM · STAY WISE · BE KIND

Remember we are coming together to support one another as members of the Action for Happiness community. Whatever we do, let it be to promote calm, wisdom and kindness.

- **We listen to what everyone has to offer**

  Everyone in the room has something valuable to offer which we honour with our full attention and non-judgment, giving them the space and time they need to speak.

- **We speak from the heart, not just the head**

  When we share our lived experiences and feelings, rather than just ideas and theories, we offer something really valuable to the group and ourselves.

- **We take care of ourselves and each other**

  It's up to us to decide how much or how little to participate, while being mindful of the needs of others. We only benefit when we are willing to put good ideas into action.

USEFUL RESOURCES

- **ZOOM VIDEO TUTORIALS:** A series of videos on how to use the various features of Zoom:
  https://support.zoom.us/hc/en-us/articles/206618765-Zoom-Video-Tutorials

- **HOW TO KEEP OUT UNINVITED GUESTS:** A blog post from Zoom showing some of the ways to keep your space safe and secure:
  https://blog.zoom.us/wordpress/2020/03/20/keep-uninvited-guests-out-of-your-zoom-event

- **HAPPY STARTUP SCHOOL VIDEO ON USING ZOOM:** A video from our friend Carlos on using Zoom to create engaging and positive spaces:
  www.thehappystartupschool.com/getting-started-with-zoom

- **LEADING GROUPS ONLINE:** A fantastic, 50-page, free e-book on how to run online groups from Jeanne Rewa and Daniel Hunter, some excellent organisers in the US:
  www.leadinggroupsonline.org

- **THE ART OF HOSTING GOOD ONLINE CONVERSATIONS:** A really good short article from Howard Rheingol on the principles of being a host.
  https://medium.com/@hrheingold/the-art-of-hosting-good-online-conversations-38c6d06642d0

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