

## Tip Sheet

### Best Practices for Virtual Learning

As learning technologies have advanced, so have the opportunities for reaching larger audiences through virtual training and professional development. With consideration and planning in key areas, virtual learning can be just as effective as learning in person. Virtual learning provides an avenue for RETAIN projects to stay connected with stakeholders through continued learning and development opportunities that support the work of RETAIN. Examples of such opportunities include developing virtual training sessions on stay-at-work (SAW) and return-to-work (RTW) best practices for RETAIN stakeholders or using virtual platforms to support workforce development activities.

Several options are available to help states deliver an effective virtual learning experience for RETAIN projects. These range from relatively simple formats (e.g., YouTube video or slide presentation) to more complex platforms that allow users to post materials, engage with participants, assess knowledge, and track use and course completion (e.g., Canvas learning management system (LMS), Moodle LMS, BlackBoard LMS, Google Classroom). Additionally, using technology fosters opportunities for RETAIN teams to continue sharing authentic interactions with stakeholders.

This tip sheet provides strategies based on adult learning principles and offers best practices to help develop meaningful virtual learning and professional development opportunities. It is intended for states that are considering creating, continuing, or expanding virtual learning opportunities for RETAIN stakeholders. Although most of the tips apply to synchronous learning events, some tips are also relevant for asynchronous learning activities<sup>1</sup>.

#### Content Development

Content development for your virtual learning program should be driven by the learning goals and objectives. Although it is prudent to have supplemental activities to accompany lessons, it is best to limit the session topics so content can remain focused and easy to understand. When developing your session:

- Align the content to organizational standards, initiatives, and programs.

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<sup>1</sup>Synchronous learning refers to virtual learning that occurs in “real time” (e.g., live training sessions or presentations). People can be in different places, but everyone participates at the same time. Asynchronous learning refers to virtual learning that occurs when the trainer and the learner do not participate simultaneously in time or location. It involves accessing resources when it is convenient for the learner and is done at the learner’s own pace.

- Use up-to-date content, terms, and strategies.
- Develop a lesson plan and outline. Consider what content must be done live and what could be done asynchronously.
- Develop a facilitator's guide, tip sheet, or other resource to support facilitators.
- Make the learning experience and activities purposeful, relevant, and immediately useful.
- Develop activities that focus on relevant problems of practice (SAW/RTW best practices, resistance to staying at work or returning to work) and leverage the strengths of the group.
- Provide opportunities for practice (incorporate practice activities to ensure participants fully grasp the new content). Build in frequent reminders of important aspects/information throughout the virtual session.
- Build in time for feedback and follow-up.
- Make sure that the presentation or resources are succinct and to the point.



## Selecting a Virtual Learning Platform and Format

### *Choose Your Technology*

As technology becomes more prevalent, virtual learning has advanced and become more sophisticated, with many platforms and formats from which to choose. Selecting the options that are most suitable for your RETAIN project will depend on multiple factors, such as your existing technological infrastructure and stakeholder's access to technology. Most importantly, however, this decision should be driven by the learning outcomes, goals, and objectives. When determining which platform and learning formats will work best, consider the following:

- **Compatibility**—Is the platform compatible with your existing infrastructure (e.g., database, internet speed, or internal network)? Can it be adapted for mobile use?
- **Ease of Use**—Is the platform easy to understand and navigate? Does it require certain hardware or technological specifications?
- **Engagement**—Does the platform offer opportunities to engage with participants (e.g., breakout rooms, polling, chat windows, video streaming, writing tools)?
- **Cost and Scaling**—Is it free, or is there a cost? Is the cost prohibitive with respect to the number of participants who may be engaged over time? Can the platform scale with you as your RETAIN project grows?
- **Facilitation**—Does the platform allow for multiple facilitators to have administrator access (e.g., a facilitator, someone who provide supports with various platform controls)?

It is also important to think about *how* to present information. The format does not have to be limited to video presentations and may differ depending on your audience. Options include group discussions, question-and-answer sessions, or communities of practice. When selecting a format, consider the following:

- Which format is most aligned with your learning objectives (webinar vs. workshop, lecture vs. dialogue, live vs. on demand)?
- Which format will work best for both your audiences and your team (e.g., screen capture/screencasts, video lecture)?
- Which format works best for the RETAIN team? (Which format is the team most familiar or comfortable with? Which options require minimal technical support?)



## Pre-session Communication and Engagement

Communicating with participants before a virtual learning event allows you to provide necessary information that will help them prepare for the training session and address potential problems with technology ahead of time. Pre-session planning and engagement strategies to consider include:

- Advertise the training session and highlighting benefits and/or expected outcomes (e.g., what participants will learn from the session).
- Inform participants of the kinds of communications they should expect (e.g., a text message/email will be sent to confirm your virtual participation, along with a link to the app).
- Attach materials to the announcement (e.g., slide deck, handouts). Make sure participants are aware of the attachments and what they are for.
- Have a registration process to collect key information (email addresses, phone numbers, etc.) and track participation.
- Provide instructions on how to connect to the platform, and encourage participants to download or install any necessary applications well before the session. Include a direct link to live sessions so that participants do not have to search for instructions on how to access it.
- Provide names and contact information of the RETAIN staff whom participants should contact if they need accommodations to gain access. Include accessibility features such as closed-captioning and transcripts.
- If possible, include a phone number that participants can use to join a live session. Having this alternative in place will enable participants to attend if they experience computer or network problems.

- When possible, identify a cofacilitator who will be available to provide assistance as needed.

As part of the planning process:

- Rehearse multiple times—Consider possible scenarios or issues that may interfere with the virtual session.
- Include all cofacilitators and helpers in the rehearsal and determine their role(s).
- Troubleshoot with technology—Make sure all tools function properly.



## Facilitation

### ***Applying Adult Learning Principles***

Adult learners have specific needs that should be considered when planning a training session for this population. Applying adult learning techniques to RETAIN virtual training sessions will improve the quality of your training and will create a positive, more engaging experience that will support retention and application of the material. Consider the following adult learning principles when designing and delivering your RETAIN training session:

- *Need to Know/Relevance:* Adults want to know why they need to learn something.
- *Learner's Self Concept:* Adult learners expect to be responsible for their own decisions.
- *Role of the Learner's Experience:* Prior knowledge and experience affect how adults learn, and these can serve as a rich resource for learning during a training session.
- *Readiness to Learn:* Adults become ready to learn when they need to know or do something to help manage real-life situations.
- *Orientation to Learning:* Adults are “life centered” (or task- or problem-centered) rather than subject-centered, and they are therefore more motivated to learn things that will help them perform tasks or address problems.
- *Motivation:* For adults, internal motivators are more effective than external ones (e.g., job satisfaction, self-esteem, personal growth and development).

### ***Participant Engagement***

When conducting a live virtual learning session, facilitators must be able to deliver engaging, quality content and manage or delegate technical issues that may arise. Accordingly, facilitators, cofacilitators, and all support staff must know their roles and responsibilities and execute them when the facilitation occurs. When planning to engage your participants, consider the following:

- Allow time for participants to become acquainted with the application platform (create brief activities) and its navigation tools (drawing, writing, underlining, circling) before the virtual session commences.
- Introduce presenter(s) and assistant(s) or support staff.
- Identify the session objectives, or if the session was previously recorded, review the objectives. What should participants know by the end of the session?
- Describe how the topic/content is relevant for the audience.
- Display an agenda. This helps the participants follow the flow of the session and helps facilitators stay on track.
- Get participants involved with an opening activity or discussions at the outset of the session.
- Demonstrate how the topic or content is relevant to the audience by linking it to organizational standards, initiatives, and/or programs (e.g., supporting the health and well-being of injured workers, the benefits of early intervention, the cost savings associated with SAW/RTW).
- Use a variety of engaging activities (e.g., breakout rooms, storytelling, scenarios, problems of practice, discussion topics, polls to check understanding of information, chat box responses, mini presentations, video clips, scenarios, real-world examples).
- Divide content into small segments to avoid overwhelming participants. Use lists with bullets and numbers.
- Use real-life examples that are relevant to the audience.
- Use creativity and application. Boredom can kill the presentation. Avoid simply reading to participants; have them use or do something with the new information.
- Respect the established time frame allotted for the session: Start and end on time.

### ***Providing Technical Support***

Despite your best efforts, your team or participants might experience challenges accessing the session or technical difficulties during the session. It is important to have a plan in place to address these issues and minimize disruptions. In addition, some formats may have different elements to attend to (e.g., chat box, polling) and will require coordination among multiple team members to ensure smooth facilitation. Strategies to consider include:

- Make sure all RETAIN team members involved in the training delivery are available and knowledgeable about the plan for delivery.
- If possible, have a cofacilitator who is responsible for monitoring the chat box.

- Use links for supplemental and additional resources. Ensure resources are organized on the electronic site, and give the length of time that resources/links will be available.
- Be prepared if technology fails. Create a backup plan using prerecorded videos, teleconference, and/or accompanying handouts prepared to be emailed to participants. This should include who is responsible for initiating the plan and communicating with the audience. Everyone with facilitation and logistical roles should be aware of the backup plan and be ready to implement it.



## Postsession Activities

As with in-person training sessions, it is important to collect participant feedback about virtual learning experiences, for both live and on-demand offerings. In addition, you may want to provide follow-up support and maintain participant engagement. The following steps will help actualize postsession activities:

- Establish an electronic evaluation, quick response (QR) code (the two-dimensional barcode), or email link so participants can access the evaluation to offer their perceptions of the training session.
- Use participant feedback to inform future training sessions (e.g., identify outliers, themes, additional needs; reduce or eliminate content).
- Follow up with participants:
  - Email or post a notification of summary sheets, tips sheets, and follow-up activities (based on positions or sites).
  - Create virtual portals to maintain session materials and announcements/reminders.
  - Arrange virtual office hours for question-and-answer periods, chats, emails, or videoconferencing.
  - Establish blogs and/or vlogs with postsession content (intended to provide follow-up activities and support).
- Archive live training sessions to allow access for participants who:
  - want to review the information or content;
  - encountered technical issues during the live session; or
  - could not attend the session during the specified time.
- Share the link to the archived session as part of your follow-up activities.

## References

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