IFZ – Electronic Working Papers

Co-producing knowledge online: workshopping ideas

... especially for creating a good atmosphere and fostering informal communication

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Before the workshop

- **ESSENTIAL:** Online workshops ask for even more structure and preparation than face-to-face workshops. Thus, plan ahead.
- **ESSENTIAL:** Make sure that you comply with GDPR and ethical standards likewise you do for face-to-face events. Related relevant information, e.g. when you plan to video-/audio-record, should be provided before the meeting takes place, and in case necessary, informed consent as well
- **ESSENTIAL:** Make a detailed workshop plan with:
  - Exact times (down to 5 min.)
  - Contents
  - Methods (have a good mix between inputs, plenary discussions and small group interactions or individual tasks)
  - Responsibilities (Who takes care of the chat function? Who reacts if somebody virtually raises their hand? Who takes notes? Etc.)
  - Depending on the structure of the virtual meeting, it can be useful to plan some 'buffer' time, which does not appear as such in the agenda, but makes it easier to deal with delays (which are likely to happen, especially as making technologies work often needs more time) → finishing a meeting earlier if the time is not needed is not a big deal, but prolonging the end of the event should be avoided. The time of all attendees should be valued.
- **ESSENTIAL:** The invitation to the workshop should comprise the goal of the workshop, the times and contents, and the technical equipment participants need for the online workshop (microphone, camera, etc.). For presenters/co-hosts it is recommended to use a headset instead of an inbuilt microphone.
- **ESSENTIAL:** Test all technology and methods beforehand. Get yourself familiar with the tools! You can also have a PLAN B platform, in case the platform you normally rely on crashes. Make sure you notify the participants in advance where to go in case of a 'crisis'.
  - In case you work with participants, who are not very familiar with the technical tools you use, a short training or test session could be offered. Another way to make participants familiar with the technical tool(s) could be to give the participants a small task to be implemented before the meeting.
- **ESSENTIAL:** Share all necessary information (presentation, third party-app-logins, etc.) with your colleagues, in case the presenter's computer/internet crashes
- Collect biographical information of participants beforehand (incl. photos and information what people like to do in their spare time) or collect videos and prepare a nice introduction-document or -video of the whole group and send this out, so people have the idea of already knowing each other when they meet online.
- Collect favourite songs of everyone and make a playlist, which can be played during breaks – so people have a nice background and maybe decide to not just turn the screen off, but stay online with their cups of coffee during breaks = enabling informal talks.
- Send all participants packages with "real life workshop gifts", like CHANGE materials and info plus other goodies like chocolate or wine etc. from your region. Or you include things in the package, which can be used during the meeting/workshop for a certain task, e.g. Yes or No signs for voting.

- Send people 'teasers' 1 week or so before the workshop, to remind them of the workshop and send short clips, podcasts etc. they can watch/listen and refer to in the discussion.
- Ask participants to do some beforehand workshop preparation like researching one specific question or collecting data in their organisation
- Hire a graphic designer who prepares online working environments (nicely) or who makes a graphic documentation during the workshop, which can be shared on the screen.
- Use additional apps to foster a 'workshop atmosphere' e.g. by means of online surveys or shared digital whiteboards people can write, place their post-its and comment on other people's post-its: Mentimeter, Google Jamboard, Padlet, MIRO etc. (.).
- If you plan to use apps where user registration is necessary, inform the participants in advance, so they can already register and get familiar with the platform.
- Prepare presentations with graphics and pictures (the shared screen should give participants always information on the current topics etc.), which can later be used to add screenshots from whiteboard results or survey results. The Power Point slides are replacing the "Flip Chart" from face-to-face workshops: they should include a nice welcome, the agenda with dedicated times for coffee breaks, and explanations to how technical tools of the platform can be used.
- Be aware of that not all participants might be able (e.g. for data capacity reasons, lack of camera) or feel comfortable with using a camera. Particularly if they work from home, they might not be willing to give insights into their private places. Ask them to prepare a profile picture or give them advice on how to display a 'neutral' background.

During the workshop

- **ESSENTIAL:** Before using more complex third party-apps like the Miro-Whiteboard, give all participants a short introduction.
- **ESSENTIAL:** Dedicate one person responsible for technology, who has also the telephone numbers of all participants, in case somebody has technical problems, so they can be solved quickly, without stopping the whole workshop or making the others wait.
- **ESSENTIAL:** One person of the organisers should be responsible for time keeping – punctuality is in virtual workshops even more important.
- **ESSENTIAL:** Make sure that the participants are informed how they should interact: raise their (virtual) hand, post their questions/comments in the chat etc.
- **ESSENTIAL:** Times for coffee breaks should stay as announced, as people working from their home offices have sometimes care and other responsibilities which they might have planned for those coffee break times. For 4 hours of workshop at least 2 x 15 min. coffee breaks are recommended.
- One person should take notes or screenshots etc. for a good workshop documentation.
- The workshop should be started with an interactive format, so that every participant can talk at least shortly from the beginning on (the longer somebody cannot interact, the higher the hurdle becomes to say something later on):

- o Introduction (e.g. with a game: everyone has 30 sec. and should pick 3 things from their environment to describe themselves)
  - o Quick survey (e.g. on expectations → make sure to document them! Or on the mood etc.)
  - o Etc.
  - o With a larger number of participants, it can be useful to divide them into smaller groups of up to 5 people (break-out sessions) for 5-10 minutes in the beginning of the event, so they can personally interact and introduce themselves
- Change tools and modes of interaction; a rule of thumb is that presentations should not be longer than 45 minutes and there should be an exchange of interaction and used tools/media every 10 minutes (10-minutes rule for online interactions).
- Prepare slides for your presentation and use the screen-sharing function when presenting.
- Let people use the chat function to collect questions and reserve time to clarify open issues.
- Whiteboards can be used to virtually implement the OPERA method.
- Other interactive methods are e.g. appreciative inquiry, speed dialogue → generally many offline workshops methods can be adopted for online settings. However, usually adaptations are necessary, and, as for real life workshops as well, the method needs to be adequate for the expected outcome.
- To engage people in the discussions it might be necessary to get them on board. So directly involve them by approaching single people with their names and ask for their opinion.
- During coffee breaks, the virtual meeting room should be kept open, giving the opportunity to casually meet with a cup of coffee for those who want to. Playing background music from the participants' playlist makes a nice atmosphere. It could also be helpful to open more, "smaller" rooms for bilateral exchange between people.
- After breaks, "energizing exercises" can bring fun and increase the activity level (again).
- During energizer activities, dialogues in break-out sessions the screen should show the faces of the (whole) group, in all other situations (discussions, brainstorming etc.) a slide or picture should be shared on the screen, so everybody knows what the topic or the task in this moment is.
- Every workshop should have some kind of closing, e.g. ask people (also using different kind of tools like Mentimeter) about their take-home-message or what they found most interesting, if there are any open topic to discuss, etc.
- Prepare a back-up plan if tools, formats, media or any kind of interaction does not work. If there is total silence, go on with the next agenda point.
- If there is a technical breakdown, postpone the event instead of waiting too long for things to get solved.

After the workshop
- Document the whole workshop well – e.g. also by working together on documents etc. Make the co-created knowledge visible.

- Include all commonly created outcomes (whiteboard screenshots, survey results etc.) in the Power Point template you prepared for the workshop, and share the file.
- Close the workshop with a feedback session (take home messages, what did I learn? How do I feel?)
- Do a team reflection on the workshop (what went well, and what not so much – what would you change next time …?) right after the event.
- If not done beforehand, you could also send the participants a small non-virtual thank you note afterwards.