



Online Learning Resource Guide



E3 ALLIANCE
EDUCATION EQUALS ECONOMICS



INTRODUCTION

E3 Alliance (Education Equals Economics) transforms education systems through data and collaboration so ALL students succeed. Founded in 2006 in Central Texas and now expanding work across the state, E3 is helping to build the strongest educational pipeline in the country to drive economic prosperity.

ONLINE LEARNING

INTRODUCTION

E3 Alliance put together an internal Task Force dedicated to researching, identifying, and developing a resource guide that includes best practices surrounding online learning. As we continue to engage in an online environment, it is important that we understand how to engage all participants and create an environment that fosters learning, thoughtful discourse, and reflective dialogue and feedback, so that every participant is learning. For this reason, we have compiled some tips and strategies that are applicable to both the professional learning context as well as the instructional learning setting. Whether our online learners are adults or students, we believe online learning will be an intricate part of our education system moving forward, and it is imperative that when selecting, planning, and delivering online learning, it is focused with ALL learners in mind.

As we continue to transition into an online environment, it is important that we understand the difference between online (virtual) learning and distance learning:

Online (virtual) learning is teacher- or facilitator-led education that takes place over the internet, with the teacher and student separated geographically, using a web-based educational delivery system that includes software to provide a structured learning environment. It may be synchronous (communication in which participants interact in real time, such as online video) or asynchronous (communication separated by time, such as email or online discussion forums).

Distance learning is learning achieved either solely using an online platform, using low technology, such as workbooks and packets, or a combination of the two. For this resource guide we are focused on providing you with information and strategies on how to deliver and implement effective high-quality online learning.

CONSIDERATIONS

While our focus was to provide guidance in delivering high-quality online learning experiences regardless of organizational role, we were intentional in providing strategies and tips that could extend support to our teachers and faculty facing the challenge of engaging non-adult learners.

We realize that in the case of instructional online learning sessions between teacher/faculty and students, a Co-Host or other support team member may not be possible. In this case, we suggest using a classroom social contract or behavior compact that outlines how everyone should behave while in video conferencing meetings.

As our experience in this new world of heightened online learning and interaction expands, we aim to update this guide periodically to reflect new ideas and strategies. As such, your feedback on the planning and implementation tips shared within the guide is welcomed and appreciated. Please let us know by [sending an email here](#).

Since we recognize the importance of tending to learner diversity in planning online learning experiences, we provided a supplemental document outlining resources gathered from Texas Education Agency (TEA) for our special populations students. You may access it [here](#).

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PLANNING

For delivery of high-quality online learning, we will highlight Zoom, an easy-to-use, web-based application for video conferencing as well as online learning sessions. Throughout this guide, we will focus on Zoom meetings. However, if you would like more information about Zoom Webinars, you may refer to "Zoom Webinars" in the Resource Links section at the end of this guide.

One of the first steps in setting up effective online learning is creating parameters that work best for your delivery intentions. Zoom has many features that can be edited and customized to your needs. On the following pages we will describe some features and settings that we recommend as you map out the delivery of your online learning experience.

- [Personal Settings within Zoom Profile](#)
- [Engagement Features Available within Zoom](#)
- [Recording Feature Available](#)
- [Sharing your Screen](#)

Please note that Zoom is frequently making updates to their system, and settings and options included in this guide may no longer be available, or may be different at the time you review this guide.

PLANNING

zoom

SOLUTIONS ▾

PLANS & PRICING

CONTACT SALES

SCHEDULE A MEETING

JOIN A MEETING

HOST A MEETING ▾

PERSONAL

Profile

Meetings

Webinars

Recordings

Settings

ADMIN

> User Management

> Room Management

> Account Management

> Advanced

Meeting

Recording

Telephone

Security

Schedule Meeting

In Meeting (Basic)

In Meeting (Advanced)

Email Notification

Other

Security

Waiting Room



When participants join a meeting, place them in a waiting room and require the host to admit them individually. Enabling the waiting room automatically disables the setting for allowing participants to join before host.

Waiting Room Options

The options you select here apply to meetings hosted by users who turned 'Waiting Room' on.

- ✓ Users not in your account will go in the waiting room
- ✓ Host, co-hosts, and anyone who bypassed the waiting room (only if host and co-hosts are not present) can admit participants from the waiting room

[Edit Options](#) [Customize Waiting Room](#)

Zoom meeting



Talking:

Select a window or an application that you want to share

Basic Advanced Files

Screen 1 Screen 2 Screen 3 Whiteboard

iPhone/iPad

Launch Meeting - Zoom - Google... Online Learning Resource Guide ... https://e3alliances.sharepoint.co... Online Resource Guide - skoop@...

☒ Share computer sound ☐ Optimize Screen Sharing for Video Clip

Share

Unmute Start Video

Security

Participants

Chat

Share Screen

Record

Closed Caption

Breakout Rooms

End

PLANNING

PERSONAL SETTINGS WITHIN ZOOM PROFILE

Within Zoom there are many setting options available. These options will vary depending on your account type (Basic or Licensed). When logged into Zoom, use the "Settings" tab from the left navigation bar to access setting preferences for your Zoom account. The settings that you choose will reflect in the options available to you when you go to schedule your Zoom meeting.

FEATURES	TIPS
Meeting ID	We recommend selecting the "Generate Automatically" option for the Meeting ID. This will produce a unique Zoom Meeting ID and prevent your Personal Meeting ID from being shared without your consent.
Mute	This will help control the talking/noise when entering the online learning session. During the online learning session, the Host or Co-Host can help manage participants who have left themselves unmuted.
Enable the Chat Feature	Depending on the type of learners you will host on Zoom, you may not want to allow participants to send a private chat.
Enable the Host to Add Co-Hosts	Co-Hosts can help manage participants. However, the Host is the only one that will be able to manage breakout rooms or run polls. For this reason, consider having someone other than the facilitator or presenter to be the Host.
Enable Remote Control	This is particularly helpful if you have multiple presenters. The person sharing their screen can give remote control access in order for others to advance the slide deck.

PLANNING

ENGAGEMENT FEATURES AVAILABLE WITHIN ZOOM

Participants can engage with the Host and other participants in a variety of ways. A few are described in the following chart.

FEATURES	DESCRIPTION	TIPS
Breakout Rooms	A way to hold small group discussions. A breakout room is a session that is split off from the main Zoom meeting.	Preassign breakout rooms prior to Zoom versus during. If conducting multiple breakouts, use a spreadsheet to map out the different groups per session.
Chat	Allows participants to send messages to the entire group or individual participants. The chats can be saved manually or automatically.	Have a co-facilitator monitoring the chat, since good conversations and questions happen within the chat. Consider limiting the chat feature, so participants can only message the larger group but cannot privately message other learners.
Participant Function	Promotes nonverbal participation throughout your online learning session; participants can raise their hands, respond "yes" or "no," and more.	Great feature to assess understanding. The Host or Co-Host can manage the feedback and should use the "clear all" to reset the feedback throughout the session.
Reaction Function	Participants can choose to have a "clapping hands" or "thumbs up" image displayed on their video profile for five seconds.	Great feature for building community among your participants.
Polling	Allows you to create single choice or multiple choice polling questions during your online learning session/class and gather the responses from your participants.	Responses can be anonymous to create a safe space for all to participate. Use the "Reports" option available from the left navigation bar on your account home page to access polling results after the online learning session has ended.
Annotate	For collaborative work, the annotate function allows users to easily post their comments on a shared space.	Great tool to assess understanding. Have your learners place "Star" or "Heart" shapes next to comments or images that they like or agree with.

PLANNING

RECORDING FEATURE AVAILABLE

- You may choose to record your online learning session automatically when scheduling, or you may begin recording during the meeting. A recording notification will appear in the top left corner. It is a good idea to let your participants know the online learning session is being recorded.
- Recording to the cloud is only available with a Licensed account, and must be selected prior to the meeting. The default is for recordings to be saved to your computer. Files will be saved under your document's folder within a file folder labeled "Zoom."
- During Breakout Rooms, pause the recording of the Main Zoom Room, as the recording will continue to record whomever is still in the main room. Remember to resume recording once folks have all returned to the main room!
- Use the Recording tab from the left navigation bar to access any recordings saved to the cloud.
- You can clip the start and end points of a recording before sharing in your follow-up email.

The screenshot displays the Zoom web interface. On the left, the 'PERSONAL' sidebar is visible with the 'Recordings' tab selected. The main content area is titled 'Cloud Recordings' and includes a 'Local Recordings' tab. Below the tabs, there are filters for 'From' and 'To' dates, a 'Status' dropdown, and a search bar. A table of recordings is shown with columns for 'Topic', 'ID', 'Start Time', and 'File Size'. Each row has a checkbox, a 'Share...' button, and a 'More' dropdown menu. The table lists five recordings, including 'Blueprint Leadership Council Meeting' and 'E3 Alliance P12 and Higher Education Partners Meeting'.

Topic	ID	Start Time	File Size
Blueprint Leadership Council Meeting	834 9625 1357	Aug 25, 2020 08:59 AM	3 Files (249 MB)
E3 Alliance P12 and Higher Education Partners Meeting	869 1338 3130	Aug 7, 2020 01:47 PM	3 Files (168 MB)
E3 Policy Advisory Council Meeting	826 7676 6990	Jul 17, 2020 11:45 AM	3 Files (174 MB)
Blueprint Leadership Council Meeting	879 0851 6327	Jun 16, 2020 09:45 AM	3 Files (1.11 GB)
DonorPerfect Training	688 234 604	Mar 10, 2020 02:11 PM	2 Files (170 MB)

PLANNING

SHARING YOUR SCREEN

You may share content within a Zoom meeting using the "share screen" function. You may choose to share your whole desktop or an individual application such as PowerPoint.

FEATURES	DESCRIPTION	TIPS
Presentations	<p>Three ways to share:</p> <ul style="list-style-type: none">• Dual monitors with slideshow and views of the presenter(s)• Single monitor with slideshow in a window• Single monitor with slideshow in full screen	<p>We recommend using two monitors, if this is an option. By using two monitors, you can share your slideshow while also viewing your presenter's notes on another monitor.</p>
Videos	<p>Make sure to select the "Share Computer Sound" and "Optimize for Full-screen Video Clip" options. This option will appear at the bottom of the screen that pops up when you select "Share Screen."</p>	<p>Have video ready to play in a separate window and not embedded in the presentation.</p>
Participant Screen Sharing	<p>To prevent participants from sharing random content, you may set sharing privileges in your meeting settings to "Host Only."</p>	<p>Designate a Co-Host that can share the presentation in case the Host experiences technical challenges during the meeting.</p>
Showing the Video Panel of Participants while Sharing your Screen	<p>While screen sharing from a Mac or Windows device, video of the other participants will move to an adjustable video panel.</p>	<p>The Participant Video Panel will show by default, but if you do not see it, click "More" in the meeting controls, then "Show Video Panel."</p>

PLANNING

To plan a highly engaging and effective online learning experience, it is important to develop a Run of Show for each class and online session. You should pre-plan for:

- Prior to the online learning session
- During the online learning session
- Following the online learning session

PRIOR TO THE ONLINE LEARNING SESSION

SCHEDULE THE ZOOM MEETING:

A Zoom meeting can be scheduled by any user; however, a Licensed account will have additional features available. Zoom also offers scheduling permissions for users or administrators to schedule on others' behalf. Both users must be Licensed users for this feature to be enabled. There are several options to include when scheduling a new meeting; we will expand on some features below:

FEATURES	DESCRIPTION	TIPS
Require Registration	This feature is only available for Licensed accounts. It will allow you to collect participant information prior to the meeting and run an attendance report at the conclusion of the meeting.	<p>To access the report when logged into your account: go to "Reports," then "Meeting," then select "Report Type (Registration)," and search by "Time Range" for the date of your online learning event.</p> <p>Zoom admins can access all registration reports by going to: "Account Management," "Reports," "Active Hosts," then click on number of participants.</p>
Polls	To add a Poll to your Zoom meeting, you must first schedule your meeting. Once the meeting has been scheduled, go to "Upcoming Meetings" on the top navigation bar. You may add a Poll by clicking on the "Add" button at the bottom of the page. Polls can also be generated during a Zoom meeting.	Only the Host of the meeting can launch Polls.

PLANNING

SEND THE ONLINE LEARNING SESSION INVITE:

Add the meeting to your calendar. When you invite your participants, make sure that the essential details are included:

- Information on the purpose or objectives of the Zoom meeting
- Logistics (date, time, and link to the Zoom meeting)
- Zoom meeting invitation with Meeting ID and the phone number to call in for audio
- Pre-work (if applicable)

ONLINE LEARNING SESSION REMINDER:

One week prior to the scheduled online learning session, email participants a reminder of the meeting. Include in the email all logistics, the agenda if it is available, and details of any required pre-work for the online learning session. Other tips we recommend:

- In addition to emailing participants, email any co-facilitators of the online learning session a version of the agenda that is timed. This is helpful for them so they know when they will present/speak, and they can help the Host stay on track.
- For the most effective participation, send an email reminder 30 minutes to one hour before the online learning session with the Zoom information. If people are receiving an inordinate amount of emails, it may be buried deep in their inbox.

PLANNING

ASSIGN ROLES AND RESPONSIBILITIES

We recommend assigning roles, such as Facilitator, Time Keeper, Stack Keeper, Technical Assistant, and Notetaker. One person may be assigned multiple roles, depending on the size of your support team.

IDENTIFY ONLINE LEARNING SESSION ROLES:

ONLINE LEARNING SESSION ROLES	DESCRIPTION	TIPS
Facilitator	This person will present the content. They should not be assigned as the Host of the Zoom meeting so that they can focus on delivery.	It should be discussed prior to the meeting if the Facilitator would like to share their screen and control the presentation, or if they would like the Technical Assistant to progress the slides for them.
Time Keeper	This person should keep special track of the agenda and inform the Facilitator if they are exceeding time allocations.	These messages should be shared on an alternative form of communication, outside of Zoom, such as a text message or internal instant messaging program since the Facilitator will be very focused on delivery.
Stack Keeper	This person will manage the Chat box and make sure the Facilitator is aware of any questions from participants.	The Stack Keeper may also need to manage the Reaction Function.
Technical Assistant	This person should be designated as the Host of the meeting.	There are some functions within Zoom that only the Host can perform. They include creating and starting Breakout Rooms and launching Polls.
Notetaker	Identifying the process for taking notes can be a complex task to facilitate given that participants may or may not need to view or contribute to the notes.	Consider using a collaborative platform such as Google Docs if you would like individuals outside your organization to add to notes. This is especially helpful if you have multiple Breakout Rooms and will be asking each group to take notes.

PLANNING

Since it is hard for the same person to concentrate on presenting while also doing the “behind the scenes” work, split up jobs when possible so that participants have a seamless experience. When dividing jobs consider what might create downtime for participants (changing screen share, moving into and out of breakout rooms, etc.)

IDENTIFY AND ASSIGN RESPONSIBILITIES:

ONLINE LEARNING SESSION RESPONSIBILITIES	TIP
Determine Who Shares Slides	Minimize the switching of the screen share which creates downtime for participants. Zoom allows whoever is sharing their screen to give remote control to another participant. This is a great way to allow multiple presenters to advance the slide deck.
Determine Who Monitors or Record the Attendance	If attendance is critical to your Zoom meeting, consider setting up the meeting to require registration.
Determine Who Monitors and Responds to the Chat Box	If you will encourage learners to use the chat feature it will be important to have someone set a plan for how you will monitor the questions or comments, so you can respond accordingly.
Determine Who Manages Participants and Breakout Rooms	It is always easier to have someone manage the breakout rooms for you, although not necessary. Make sure to account for the time it takes to open your breakout rooms and bring people back into the main room. You will want to include this in your timed agenda.
Assign a Co-Host(s)	If you would like to assign a Co-Host, you must do so within the Zoom meeting. You cannot preassign a Co-Host (you may only preassign an alternative Host). Once a meeting has started, the Host can switch duties to a Co-Host in the “participants” tab. Please note: only the Host can launch polls or assign breakout rooms.

PLANNING

DURING THE ONLINE LEARNING SESSION

Similar to in-person meetings, participants will arrive at staggered times in Zoom meetings. While waiting for everyone to arrive, we recommend a welcoming message on the first slide of your presentation. This informs your participants that the online learning session has not yet started. You may also choose to play music during this time so that participants can check both their visual and audio.

At the beginning of your online learning session, consider sharing these suggested tips with your participants:

- Select a background/virtual background that is not distracting.
- Please mute yourself if not talking.
- Share your video feed but be aware you are sharing your video feed to all. Turn off your video as appropriate. We encourage everyone to turn on their video when in Breakout Rooms, since more in-depth conversations happen here.
- Familiarize yourself with these tools:
 - Participants > Raise hand
 - Participants > Check mark
- Please use the Chat Box as a back channel for questions.
- Please make sure your full name is disclosed on your screen.

PLANNING

BREAKOUT ROOMS

Breakout rooms allow you to hold small group discussions. Participants will receive an invitation to join a separate Zoom meeting space, but will have access to rejoin the main room or ask for help. Once your participants join their breakout room, they will no longer have access to the main room presentation or chat. Consider sending breakout directions or prompts to participants via email before the start of the online learning session to ensure they can easily reference during breakout. Or plan to have a facilitator in each breakout who has access to the slide and can screen share for others in the breakout room.

- Wait one minute before resuming your presentation to allow for participants to return from their breakout rooms.
- If a participant loses internet connectivity, or exits the Zoom meeting, they will first enter back in through the main Zoom meeting room. The Host will place them back into the breakout room of which they were originally assigned.
- Discussion protocols or activities with many steps may be difficult to accomplish in breakout rooms. It is hard for participants to answer questions on the spot as they struggle with directions. Plan for simple and intuitive discussion/activities that can be successful and meaningful to participants. The Host can and should drop into breakout rooms to ensure discussion is on track and answer any questions, if needed.

DAY-OF CHECKLIST

To ensure you are ready for your Zoom meeting take a moment to run through this checklist to make sure you have everything on hand well before your start time:

- Handouts/notes/agenda is printed and easy to reach.
- Anything for screen share is open and all other windows/programs are closed.
- Other line of communication is available (such as text).
- Notifications (email, chat) are silenced so it doesn't disrupt screen share.
- Slides:
 - Images are large enough to see with borders to help them stand out.
 - Text is large enough to be read easily.
 - Text includes a mix of upper and lower case for easier reading.
 - Use recognizable icons/ideograms when possible.

PLANNING

EVALUATIONS

Identify, develop, and plan how you will evaluate whether the participants met your objective. Make sure you allocate at least five to 10 minutes to your agenda for the evaluation; this will ensure participants have ample time to respond. For best results, conduct the evaluation before your closing remarks to increase participation.

FOLLOWING THE ONLINE LEARNING SESSION

Follow up with your participants. Develop a follow-up email template to save time, rather than creating a new one each time. Ideally within 48 hours, send a message with notes and any next steps:

- Remind them of content and provide resources.
- Include any attachments promised and/or additional resources.
- Include reminders for action steps or call to actions.
- Be available for questions. Offer the opportunity to connect via phone, if needed.
- Include supervisors, if appropriate.
- Provide the link to the Zoom recording, if available. Be sure you have reviewed it and made any necessary edits.

PLANNING

HELPFUL TIPS

Your first activity can be a quick icebreaker. This will provide extra cushion time for late arrivals. Have your participants answer a quick question and have them enter their name, organization, and role into the chat box.

Note that participants are only able to view content within the chat box that is time stamped after their entry into the Zoom meeting. Consider having any instructions or links provided within the presentation as well.

Play a song during your breaks. This allows your participants to walk away from their computers to refresh their drinks, stretch, or take care of any other self-care items. Once the music stops, they know the break is over.

Enter the return time from the break into the chat box.

Create structured opportunities for attendees to engage.

Utilize the chat feature to enable participants to post questions/comments in real time.

Engage participants at the session's beginning with a Poll.

Use breakout groups for small group sessions. Facilitators can 'drop-in' to mimic walking around the room to gauge participant understanding.

Before transitioning to a new topic, ask participants if anyone has anything to contribute to the current topic.

IMPLEMENTATION

When implementing successful online learning we first need to consider the learning outcomes sought, technology constraints/opportunities, resources, and general organization readiness. Throughout your planning, understand that change is a given. We cannot simply replicate our old ways of doing things in a digital environment. Challenges will be met; therefore, we need to be ready for the disruption change will bring, but remember disruption can be good. Implementation of online learning requires careful planning to be successful. Before implementation, the goals need to be clearly articulated and learner centered. We must identify the Why, What, and How.

WHY:

Why are you presenting this particular lesson or concept? Define your why, so as you begin to prepare what resources and content you will use to guide the learning experience, participants will be focused on your why and contribute to participant engagement and learning.

EXAMPLES

Professional Learning and Development: Send an email or video the week prior to provide an overview of the why and learning that will take place in the Professional Learning and Development session.

Instructional Lesson: Post a weekly announcement to provide an overview of the coming week's topic or a recap of the previous week's work, or both.

WHAT:

What are the desired outcomes? Make sure to set clear expectations for your participants. Remember, if online learners are working by themselves, they will not be able to ask for, or receive, clarification in the moment they first encounter your assignment instructions. Because of this, you will need to explain what you're looking for as clearly as possible in an online platform.

EXAMPLES

Write down the expectations, create an informal, two-minute video to explain the assignment.

Provide a rubric.

Share an example of the desired outcome of the assignment.

Have a trusted colleague evaluate your online learning experience. Ask them to go in and poke around as if they were a participant. Use their observations to help you make a few tweaks, if needed.

IMPLEMENTATION

HOW:

The following section on pedagogical knowledge helps situate the why, what, and how in the specific context of classroom instruction, both remote and on campus. Although the focus is on teaching methods for an instructional setting, the approaches outlined below can be adapted to any online learning experience of which the goal is to foster learning, discourse, and reflection.

How do you organize the content? Online learning suffers a well-earned reputation of being boring, lackluster, and unengaging. The appearance of our surroundings and the way in which things are organized affects our level of engagement.

EXAMPLES

Allow participants to preview the content.

Think about how the use of engagement tools, modules, videos, Google docs, other engagement/organizing tools helps or hinders the participant's progress through the learning experience.

Strike a balance between scrolling and clicking. Participants should access content evaluations and learning activities without constantly clicking more and more links.

PEDAGOGICAL KNOWLEDGE

An online learning environment that fosters critical thinking and problem solving is implemented systemically and driven by pedagogy.

When introducing technology in educational settings, we need to rethink the pedagogical methods of deployment. Technology offers us so much more than whiteboards and chalk ever did. We can now employ rich multimedia content that provides a more interactive and engaging learning experience. Teaching methods, therefore, need to be reimaged to get the best out of technology. We know from studies in education psychology how learners retain knowledge and how they can apply it to situations outside the classroom. This has motivated the development of various 'active' or learner-centered pedagogies (teaching methods). These include problem-based learning, scenario-based learning, and inquiry-based learning, to name a few. These pedagogies promise better learning outcomes than previous didactic approaches to teaching as they promote the development of critical thinking and problem-solving abilities.

IMPLEMENTATION

Learning is dependent on the pedagogical approaches teachers use in the classroom. A variety of approaches are common in schools, but some strategies are more effective and appropriate than others. The effectiveness of pedagogy often depends on the particular subject matter to be taught and on understanding the diverse needs of different learners. Below are a few pedagogical approaches:

APPROACHES	DEFINITION
Blended Learning	Rethinks established routines and sequencing of learner work and teaching to enhance understanding and relies heavily on digital resources. This approach aims to be engaging and coherent for learners, as well as to optimize access to teacher expertise by reducing routine tasks.
Problem-Based Learning (PBL)	A teaching method in which complex real-world problems are used as the vehicle to promote participant learning of concepts and principles as opposed to direct presentation of facts and concepts. In addition to course content, PBL can promote the development of critical thinking skills, problem-solving abilities, and communication skills. It can also provide opportunities for working in groups, finding and evaluating research materials, and supporting life-long learning.
Project-Based Learning	The content is baked inside a long-term project, which is a real-world problem learners need to solve in a creative and authentic way. In the process of solving the problem, learners also meet required standards, but this work is integrated into the project, not separate from it.
Inquiry-Based Learning	More than asking a learner what they want to know, this is about triggering curiosity. Activating a learner's curiosity is a far more important and complex goal than mere information delivery. Despite its complexity, inquiry-based learning can be easier on teachers, partly because it transfers some responsibilities from teachers to learners, but mostly because releasing authority engages learners.

IMPLEMENTATION

PROJECT-BASED LEARNING ONLINE

To provide an example on how to plan, below are steps for implementing project-based lessons:

SCENARIO	SOLUTION
Driving Question and Hook	Gain the learner's attention and set the stage. This lesson should pique learner's interest and make the project relevant for the learner.
Introduce the Project	Include a video or resource document that explains the path the learner is about to embark upon at the overview level.
Formative Assessments	These will continue across several steps of the project to gauge learner understanding. Distinguishing between a learner's content knowledge and their project understanding helps the teacher plan between learner interventions or online lesson adjustments.
Build Content Knowledge	To build content knowledge you include: reading, video, and images that introduce the learner to new content for understanding (analysis, etc.).
Create Learner-facing Rubrics	Write the standards as success criteria for learners, or "I can" statements. This breaks down teacher-facing language into vocabulary that learners can understand, which helps them to know what is expected of them while also helping them reflect on their learning.
Summative Assessment	The learner submits their project and an opportunity for revision is facilitated.
Sharing	Learner publishes the work to share with an authentic audience.

IMPLEMENTATION

ORIENTATION AND PRE-WORK

One of the most important steps in online learning is implementation. Successful execution of this step is strongly related to proper planning. Highlighted below are examples and important things to consider.

ASSESS NEEDS OF PARTICIPANTS: PRIOR KNOWLEDGE, REASON FOR JOINING, BACKGROUND, ETC.

Consider content/modality/desired outcome and what questions will help you shape the session to best fit the needs of the participants.

EXAMPLES

You are leading a professional learning on instructional coaching for campus-based coaches within a district. Gather information from potential participants. You know that most are familiar with popular coaching models and theory but are hoping to spend time understanding how to organize and implement this work effectively. This means you can design the content to allow more time for modeling coaching strategies and less time on the theories of coaching.

When leading professional learning for a campus team, you know the desired outcome is to produce a detailed process map for their system. Knowing the desired outcome, you can plan the experience with adequate time for collaboration and work to complete the process map.

MAKE SURE TO SEND ANY NECESSARY HANDOUTS/MATERIALS AHEAD OF TIME SO PARTICIPANTS ARE PREPARED TO ENGAGE IN THE LEARNING AND KNOW WHAT TO ANTICIPATE.

Consider what resources your participants will need to optimize learning and engagement. Email ahead of time or create a Google Doc that can be shared ahead of time or that can be accessed during the session, whether viewable or editable.

EXAMPLES

You would like participants to use a bubble map during a brainstorming session. Send a PDF of the bubble map at least one day ahead and ask participants to determine if they are more comfortable printing a copy, drawing it on their own paper, or using it electronically.

You would like participants to use a discussion protocol in a breakout room. Send the discussion protocol one day ahead and ask participants to have a paper or electronic copy ready to reference during the session.

IMPLEMENTATION

SEND A LIST OF "READY-TO-LEARN" GUIDELINES SO PARTICIPANTS KNOW WHAT TO HAVE ON HAND DURING THE SESSION. THE MORE INFORMATION YOU CAN PROVIDE, THE BETTER PREPARED THE PARTICIPANT WILL FEEL.

Consider if work could be completed ahead of time to benefit learning during the session. This will reduce the length of the time spent on Zoom during the session and maximize the focus on things that must be done live with participants.

EXAMPLES

Before a session on improving learner attendance, send an article describing the success at one school. Ask participants to be prepared to share one "Ah Ha" and one question about the article during the session.

Background reading/video on the topic: provide the reading/video at least one week ahead and provide a discussion prompt for participants to be ready to share during the session.

ASK PARTICIPANTS TO SEND/POST/SHARE SAMPLES OF ANY ASSIGNED PRE-WORK AHEAD OF TIME TO USE DURING THE SESSION OR CONVERSATION PRIOR TO THE SESSION

Consider how might participants' pre-work be used to enhance the learning and/or discussion.

EXAMPLES

To prepare for a math education session, participants scan and/or share three student samples that highlight different levels of student work to identify areas of strength and improvement.

Before a session on supporting English Learners in science, ask participants to post one strategy that has worked in their classroom to an online collaboration tool, such as [Padlet](#). During the session, the Host can acknowledge posts/comments, as they are relevant, to honor participants' knowledge and experience.

Teams will be attending a session on teacher effectiveness. Before the session, teams are asked to list all the instructional strategies they know are currently being used on the campus, group them into logical sets, and give each group a name. The team should have this list-group-label summarized into one document that can be shared onscreen or otherwise viewed by all participants during the session.

IMPLEMENTATION

PROVIDE PARTICIPANTS WITH CLEAR DIRECTIONS AND RESOURCES PRIOR TO THE MEETING, SO THEY CAN BE PREPARED.

Consider what online tools they will need to use. Send detailed directions on what to download and ensure capability and/or usage prior to session.

EXAMPLES

Ask participants to login and test necessary platforms prior to online learning session training. Send detailed directions for login and ask them to test speakers and microphone to ensure they are working. Give directions for testing the functionality of the tech/sites you will be using.

COURSE DESIGN

The course design can play a huge role in usability and learner success. Here are some things to consider when you are planning your online learning experience:

HOOK YOUR PARTICIPANTS.

Consider WHY are we learning this? Provide a rationale that is inspiring and compelling for participants, and is specific to the content of the session.

EXAMPLES

Show data that links graduation rates, future earnings, and chronic absenteeism at an attendance professional learning.

Show quotes from past coaches/teachers describing improvement on instructional coaching at the beginning of professional learning.

Ask participants to think/write about one person, as you give a verbal description. Then explain how the content of the session will help them improve outcomes for that person.

BEGIN WITH THE END IN MIND AND PLAN "JUST ENOUGH."

Consider: What outcome/result do you want? Why are participants joining the session? What is essential to achieve the outcome? What is most helpful? Review and reduce at least once, always keeping the big picture in mind.

EXAMPLES

When planning a professional learning, outline all the content that you would like to deliver to participants. Then review the outline and highlight the parts that are *most critical*. Consider the desired outcome of the session and determine which parts of the outline are "essential" and which parts are "nice to know." Assign times needed for delivery, processing, and activity for each piece of content on the outline. Reduce the content to "essential," if needed to provide adequate processing and activity time to achieve the desired outcome.

IMPLEMENTATION

HONOR THE PARTICIPANTS' EXPERTISE AND EXPERIENCE THROUGHOUT THE LEARNING DESIGN.

Consider your language throughout the session and use language that highlights participants' expertise and experience.

EXAMPLES

Ask participants to share strategies that have worked for them in their classroom and then make connections to their share-outs when presenting a list of effective student collaboration strategies.

After presenting a strategy for directing coaching conversations, allow participants to discuss with a partner and make connections to similar conversations they have had with people they were coaching.

SHARE CONTENT SO IT IS HEARD.

Consider avoiding jargon, include stories that support/personalize the content, be inclusive, and, most importantly, make connections between content and real-life learning.

EXAMPLES

Using jargon or acronyms can distract participants from further learning. Even with widely used terms in your field, some participants may not know the meaning. Not being familiar with a term can turn a participant off from enjoying and learning during the session.

Give an example from your own classroom experience when guiding participants to learn a new student collaboration strategy.

Examine your stories and language to ensure that you are not unintentionally communicating bias or stereotypes that might alienate a participant or cause discomfort.

TO PROVIDE BUY-IN FOR YOUR PARTICIPANTS, YOU NEED TO HIGHLIGHT YOURSELF AS THE EXPERT.

Consider sharing your background and specific connection to the session content in your own work and experience.

EXAMPLES

Share your background and specific connection to the session content and participants. Prepare one slide with relevant information to screen share while you are introducing yourself to the participants.

IMPLEMENTATION

KNOW MORE ABOUT THE SUBJECT THAN YOU ARE SHARING

Consider what questions you will need to be prepared to answer and or direct participants to the proper resources. Be confident! As the person leading the session, you are the expert.

EXAMPLES

The complexity of your session topic or the time allowed may mean you have to deliver the essential pieces only. If a participant asks a question about the supporting research, you may need to direct the participants to a link to a detailed source, pause the session at an appropriate time to respond verbally, or tell the participants you will stay online during an upcoming break to discuss this question and the research. Even in a virtual session, this will make you seem available to participants who wish to know more.

LEARNING IS RELEVANT AND HAS IMMEDIATE VALUE TO THE LEARNER.

Consider how much time participants need to apply learning to a specific problem they identify. If possible, provide guided work/processing time throughout the session to ensure they can use the content to develop a working solution for identified problem.

EXAMPLES

A campus team attends a professional learning session on math instruction. During the day, they determine that students are not consistently using a problem-solving method to organize their work. The team has time during the session to plan for supporting teachers to ensure students have access to appropriate problem-solving methods.

LEARNING NEEDS TO BE PROCESS ORIENTED NOT CONTENT ORIENTED.

Consider, as much as possible, concepts that are “essential” and provide more time for participants to apply the content to their unique contexts.

EXAMPLES

In a strategic planning workshop for campus leadership teams, participants are given a short overview of what a process map is and are show two to three different examples (content). Participants also learn about the important considerations that may affect their process map (content). Then participants are given a guide to help them develop their own process map and asked to plan their own collaboration and work time to create a process map before the next session.

IMPLEMENTATION

WHEN LEARNERS HAVE THE OPPORTUNITY TO SELECT THEIR OWN PATH, THEY ARE MORE ENGAGED.

Consider offering choices whenever possible.

EXAMPLES

Give two to three methods participants can use during processing time (think silently, write on your notes, text a participant).

IMPACTFUL LEARNING IS SUSTAINED OVER TIME, IF POSSIBLE.

Consider the content vs. collaboration and work participants will need to do to achieve the desired outcome. Can the session be split into three, one-hour sessions instead of one long session?

EXAMPLES

In professional learning for instructional coaching, the first session teaches the process of planning for a crucial conversation and asks participants to think of a specific upcoming conversation, plan for it, and bring their plan to the next session. In the next session, participants role-play their planned conversation with a partner in a breakout room and get feedback. Participants are then asked to hold the crucial conversation and bring a reflection to the next session.

IMPLEMENTATION

To implement a highly engaging and effective online learning experience, it is important to develop a lesson guide that includes opportunity for connection, engagement, and reflection. You should pre-plan for:

- Prior to the online learning session
- During the online learning session
- Following the online learning session

PRIOR TO THE ONLINE LEARNING SESSION

BE FAMILIAR WITH THE MECHANICS:

A little bit of practice can go a long way. Make sure you are familiar with all the technology you will be utilizing ahead of time. See below for some easy ways to make certain your presentation comes across as well planned and executed:

TIPS
Practice alone and then with a group of people who will give you honest feedback.
Do a full run through of activities with tech tools and slides to ensure smooth transitions (screen share, breakout rooms, annotation, etc.).
Have all documents/views needed during the session already open and all other tabs/documents closed.

ANTICIPATE STRUGGLES:

Think about possible technical issues and have a solution in mind. Anticipate what could possibly be a struggle for both the presenter and participant. See below for examples:

SCENARIO	SOLUTION
A participant drops off the online learning session because of connectivity issues	Provide norms or directions for rejoining the online learning session at the beginning and in pre-online learning session communication.
A presenter drops off the online learning session due to a connectivity issue	Plan for the Co-Host or alternative Host of the online learning session to take over if the presenter is having difficulties.
A Host cannot share a video during the online learning session because of lagging WIFI	Prior to your Zoom meeting, have a plan in place for the Co-Host to take over the screen share and show the video, or decide if the online learning session should continue without the video.

IMPLEMENTATION

LOOK AND FEEL OF THE EXPERIENCE:

Think about what the look and feel of the experience will be like for the participant. See below for some helpful tips:

TIPS

Try any features as if you were the participant with someone else hosting to ensure you can give clear directions on using them.

View all your slides in presentation mode. Do transitions work?

Plan with a partner/team.

Create a detailed agenda and make sure to include the timeline.

Plan for 10-15 minutes or 7 items of information (be mindful of attention span/working memory).

Insert activity that provides processing time for each CHUNK.

Plan for periodic summary/review (transition to new topic, break, etc.).

Preview/foreshadow upcoming content (transitions).

DURING THE ONLINE LEARNING SESSION

START YOUR ONLINE LEARNING SESSION STRONG:

Ensure the session begins with a welcoming atmosphere. Gestures do not need to be grand to impress your participants, but simple courtesies can go a long way. See below for some easy ways to start your online learning session off strong:

TIPS

If possible, greet participants as they join.

Consider an activity at the beginning that is engaging but not crucial. For example, ask participants to enter in the chat box one thing someone did to make them feel appreciated.

Consider playing some soft-volume music to set the mood.

Start on time, even if waiting for participants.

IMPLEMENTATION

ENGAGEMENT DURING THE ONLINE LEARNING SESSION

Our recommendation is to give yourself grace as the Host. It may not be possible to manage participants remotely in the same way you can manage them in person. However, some tactics may increase the quality of engagement offered within online learning.

TIPS TO INCREASE THE QUALITY OF ENGAGEMENT:

FEATURE	TIP
Frequency	Time/Engagement Activity Ratio: Rather than planning for a one-hour session, consider doing four, 15-minute sessions with an engagement feature after each one. For every 15 minutes, lead participants in two to three engagement opportunities. Give your audience a problem to solve to sustain a continual expectation of meaningful engagement. Examples of engagement may be a group-generated list or a poll.
60 Seconds	In the first 60 seconds of the conversation enable your audience to empathetically understand or experience the problem/opportunity before asking them to solve it.
Co-Host	If you have a Co-Host, consider using them to monitor participants' level of engagement via facial expression, how often they respond to questions, or provide feedback.
Nowhere to Hide	Give people tasks they can actively engage in. Use breakout groups intentionally with limited time frame to address the problem/topic. Have answers shared in the online learning session chat or ask a few to share their approach/answer.
MVP	Use a Minimum Viable PowerPoint (MVP). Include the least amount of data on the slide needed to inform and engage the audience. Mix data with stories for higher participation.

IMPLEMENTATION

TIPS FOR CREATING MEANINGFUL CONVERSATION:

Most will agree that engagement is important for a high-quality learning experience. Here are a few ideas for increasing and ensuring higher levels of involvement in online learning:

ACTIVE LEARNING	EXAMPLES
Whole Body	<ul style="list-style-type: none">• Engage your participants through questions or stories.• Embed images/humor/movement whenever possible.• Ask for physical response like thumbs up.• Encourage movement. Ask participants to stand up and stretch or walk during the break.• Provide an incentive to return from the break. For example, you can say, "when you come back, I will share a short video I like to show my staff at the beginning of the year." Or "When you come back from break, I want to share the joke my 10 year old told me."• Modulate your voice—change it up and add expression.• Avoid Chaos/Confusion, give clear directions for all activities, verbally and in writing.• Example: Ask participants to pause and reflect by giving a prompt and asking them to write it down or enter it in the chat.
Talk/Write/Think	<ul style="list-style-type: none">• Ask a specific question or give a specific prompt.• Generate a question for the large group.• Generate a question to take back to their peers after session.• Summarize current learning: title, one sentence, retell, teach to someone else (provide a specific audience).• Create a comparison/analogy/metaphor.• Create graphic organizers.• Reflect: organize learning, highlights, most important, what you will share with others.
Draw	<ul style="list-style-type: none">• Create a visual representation: quality is not the point; processing is the point.• Randomly ask someone to share on camera.
Play a Short Game	<ul style="list-style-type: none">• Scavenger hunt.• Charades.• Pictionary (use the white board function in Zoom).

IMPLEMENTATION

TIPS FOR CREATING MEANINGFUL CONVERSATION

Discussion must be built into the course design and tied to learning objectives. It is important to ensure that meaningful conversation takes place. Discussion topics and questions must be aligned with the curriculum.

STRATEGY	EXAMPLES
Create Purpose-Driven Engagement	Each time you ask learners to engage in the course or with each other, clearly state the specific purpose of the activity and connect it to the learning outcomes for the course.
Provide Clear Guidelines for Participation	Providing guidelines about work, time, commitment, and effort helps learners to structure their learning.
Prompts	Ask questions that require higher order thinking.
Provide Effective Feedback	A successful leader of a vibrant learning community provides effective feedback to individuals in the community.

AT THE END OF THE ONLINE LEARNING SESSION:

- End with memorable closure.
- Call to action.
- Quick and purposeful—too long will lose impact.
- End on time or early.
- Have your participants share their answer in the chat (this can quickly become overwhelming if conducting a large online learning session, so use sparingly).

IMPLEMENTATION

FEEDBACK:

Meaningful feedback is an essential component of keeping learners or participants motivated and engaged with learning material. When learners can see that you're genuinely interested in the success of your materials or program, they'll feel greater levels of engagement and motivation. Providing effective feedback helps learners glean the most information from an online learning experience, which can significantly impact their overall performance outcomes.

When learning online, feedback allows the learner to assess their progress and determine potential areas of self-improvement. It promotes self-reflection, increases knowledge retention, and encourages constructive discussion with facilitators or other online learners.

The following are some strategies for gathering feedback:

TIPS

Choose, or create, an online course that uses interactive content in the form of short surveys or quizzes; this will allow learners to check how successful they have been in retaining the content.

Arrange office hours and make sure to set times that will accommodate your learners/participants.

Take note of learners who do not participate and contact them individually.

Return graded assignments to learners' personal mailboxes within 48 hours and make sure to provide substantive feedback and/or evaluation of work submitted.

Thank participants publicly or use the online chat feature in response to their comments and participation.

IMPLEMENTATION

FEEDBACK STRATEGIES	DESCRIPTION	EXAMPLES
Descriptive	<p>Uses specific examples</p> <p>Identifies areas to correct</p> <p>Corrects areas in error</p>	<p>Met, Not Yet, I Noticed: Focuses on the quality of progress with the learner's work and then adds a brief comment that focuses on quality and progress of the work.</p> <p>More of, Less of: Feedback is given in relation to the criteria with two to three suggestions for what the learner needs to do more of, or less of, to be successful.</p> <p>Key Questions - What's working? What's not? What's Next?: Learners can build on strengths, while considering next steps and what is not yet working.</p>
Constructive	<p>Incorporates a positive tone</p> <p>Balances between positive and negative comments</p> <p>Avoids overly positive comments</p> <p>Individualizes comments</p>	<p>Positive:</p> <ul style="list-style-type: none"> • Phenomenal job on ... • I believe your example was ... • I enjoyed your work because ... • It really impressed me when you ... <p>Next Steps:</p> <ul style="list-style-type: none"> • One suggestion would be ... • Perhaps you should add ... • I think you should add ... • Take into consideration moving ... <p>Questions:</p> <ul style="list-style-type: none"> • What are ... • Where is ... • What do ... • When does ...
Timely	<p>Is provided frequently</p> <p>Is utilized in a prompt and ongoing manner</p>	<p>Establish a time period when all assignments or tests will be graded and returned to the learners.</p> <p>Detail when learners should expect teacher feedback (for questions asked, emails sent, projects submitted, and tests taken).</p> <p>Feedback can be given verbally, non-verbally, or in written form.</p>

IMPLEMENTATION

FEEDBACK STRATEGIES	DESCRIPTION	EXAMPLES
Action Oriented	<p>Indicates what corrective action to perform</p> <p>Connects feedback to current objectives</p> <p>Relates feedback to upcoming content</p>	<p>Be Specific: "Good Spelling" or "Great job following the steps to solve the problem."</p> <p>Be relevant to the task: Don't comment on writing in a listening assessment.</p> <p>Include an action: Use capital letters for names; listen to the other person's answer.</p> <p>Be timely: Give feedback as soon as possible after a task (orally or on paper).</p> <p>Be short (one or two comments): "You have good ideas. Use periods to end a sentence."</p> <p>Include a positive: "You didn't finish" vs. "Plan your time to help you finish by the due date."</p>
Prioritized	<p>Balances between too few and too many comments</p> <p>Comments on recurring errors one time</p> <p>Uses a bank of comments</p> <p>Provides learners with a rubric before an assignment</p> <p>Uses a rubric when grading</p>	<p>Four questions to use when prioritizing feedback:</p> <ol style="list-style-type: none"> 1. Does the feedback reinforce the learner's strengths? 2. Does the feedback focus on one or two areas for improvement? 3. Will the focus of the feedback have the greatest impact on the learner's understanding of the concept? 4. What new strategy or instruction will be provided for the learner?
Personalized	<p>Includes a learner's first name</p> <p>Uses a casual or conversational tone</p>	<p>Have a one-on-one conference with the learner.</p> <p>Notes and comments added digitally on the learners work.</p>

IMPLEMENTATION

FOLLOWING THE ONLINE LEARNING SESSION

EVALUATION:

Assessing participant learning is an essential component of effective teaching and learning in the online environment. Here are some strategies for evaluating learning:

STRATEGY	FEATURES
Use Live Streaming	Live streaming is effective in knowing if learning outcomes are met because it increases interactivity, boosts learners' engagement, and provides immediate feedback.
Give Assessments	Both formative and summative assessment tracks learner understanding and allows you to adjust teaching accordingly.
Get Feedback	Feedback allows learners to track their performance and ensures they do not drift from the set learning outcomes. Feedback will also assist you to evaluate the effectiveness of your materials and make any necessary adjustments. Completion rates of different segments of an online course can be used to gauge feedback on the engagement factor. If users are not completing certain courses, or certain parts of courses, it's worth looking at revamping and improving the material.
Use Collaboration	If you allow your online learners to form small groups and learn concepts together, you can increase the chances of achieving learning objectives.
Wrapping Up	Knowing if objectives are met is essential to the success of your online course. In fact, before starting to deliver a course, you should clearly outline how you'll evaluate its success.

IMPLEMENTATION

REFLECTION:

Reflection helps online learners absorb and assimilate the information more effectively. It also allows them to put their newfound knowledge into a real-world context. Here are some tips for encouraging online learner reflection:

TIPS

Engaging with learners directly after the completion of a course is the best time to gather accurate feedback about their learning experience, while their thoughts and experiences are still fresh and unclouded.

Break online learners into groups, assign them a real-world problem or task, and then let the knowledge sharing begin.

Sometimes all it takes is a carefully crafted question to trigger self-reflection. Learners may think that they know everything about the topic, but a line of inquiry reveals otherwise. Post questions to the chat feature that encourage online learners to reflect. This process also helps them tie the subject matter into real-world applications.

Use mind maps: mind maps begin with a word, problem, or image in the middle of the screen. Then, learners branch off in different directions to uncover new ideas or solutions. Mind maps are also great brainstorming tools, as they allow online learners to reflect on different facets of the subject matter.

Incorporate real-world activities: real-world activities emphasize the practical uses of the knowledge and skills they are acquiring. These activities also immerse them in realistic situations so that they can analyze their response.

RESOURCE LINKS

PLANNING

Zoom:

[Breakout rooms](#)

[Chat](#)

[Participant Function](#)

[Reaction Function](#)

[Polling](#)

[Annotate](#)

[Zoom Webinars](#)

[Save](#)

[Clip](#)

[Setting for Sharing](#)

[Zoom Training Videos](#)

[Administrator Deployment Guide](#)

[Zoom Help Center](#)

RESOURCE LINKS

IMPLEMENTATION

[Harvard Business Review: How to Get People Engaged](#)

[Running Virtual Meetings](#)

[Social Distancing Doesn't have to Disrupt Mentorship](#)

[VILT Best Practices: How to Move your Training Content from ILT to VILT](#)

[Track Participant Level of Engagement. Know what Data to Collect, and How to Collect it.](#)

NOTES

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