Guidance notes

Guide to delivering virtual sessions

LLOYDS BANK

In some cases, you may be delivering financial capability to a group of young people using an online web conferencing platform. This guide will support you through that process.

Where the group you are delivering to are all together in the same location, and you as the facilitator are delivering from a different location, you can use suggestions from this document together with the **delivery guides for face to face sessions** for each session. Do bear in mind that in this case, you'll need greater support from the teacher or group leader to facilitate activities and encourage young people to engage.

When delivering financial capability to those aged 16+, where both you and all of the participants are engaging with the session virtually (signing into the session on their own device from separate locations), you can use suggestions from this document together with the **16+ virtual delivery guides** for each session.

Before your session

With any technology-based activity, preparation is key. As long as you ensure that both you and your group have all of the information in advance, and have tested your software, everything should run smoothly.

Where working with young people below the age of 18, your contact will need to set up the session and you'll need to use their organisation's platform. Ask them to share the relevant links and test the platform in advance, and if you've not used this platform before, ask if you can have a quick chat to go through the key features.

You should also double check the following prior to using your host organisation's platform:

✓ Will you be able to take on the role as session 'host'? While your contact should still remain present throughout, this will often impact your ability to activate some of the features, such as muting the group or activating polls.

✓ Are there restrictions on someone external to the organisation using or downloading software?

✓ Are you able to use features of the platform to support those with any specific needs or requirements?

✓ Are there any limitations on the length of the session or the number of participants that can join? You can deliver this group session to as many people you and your contact feel comfortable with. A virtual session may work better with a maximum of 10-15 participants. If any participants have additional learning needs, you may also wish to limit numbers further to best support them and help them utilise the various supporting features of whichever platform you use.

✓ Will your contact be able to support with any technical challenges that come up while delivering, or do they have a colleague that can?

In some cases, such as when working with older participants, or when the group are in their organisation setting and you are the only person joining remotely, your host organisation may ask that you use your own platform. If this happens, you should still ensure that they remain present throughout the session.

Platforms

If choosing your own platform, or you are given options from your host organisation, there are a few more things to consider:

- Do you work for an organisation that has a video-conferencing platform that can be used for external deliveries? This could be a good option, as if you need any help, you may be able to reach out to your IT support team. This will be most suitable if the group are together in their own setting, and you as the facilitator are the only one delivering remotely.

- Are there limitations on what software the organisation you're delivering to is able to access? For example, some platforms can only be accessed online, whereas others will need to be downloaded.

- There may be platforms available to you through personal IT subscriptions, or free options online, but consider that these often have limited features that mean they may not be appropriate for delivering your session.

- Does the platform have the option to share a PowerPoint file or screen share? The PowerPoint is central to the delivery of the session.

- Does it have a time limit on deliveries? While the sessions can be broken down into smaller activities, they take an hour to deliver in full.

Once you've chosen your platform, it's important to test it by doing a mock call with a friend or colleague, ensuring that the functionality you need works and it can be accessed outside of your regular server.

Inclusive Delivery

When preparing for your session, bear in mind the individual requirements that participants in your group may have.

Some platforms:

- Offer different ways for participants to contribute – e.g. via a chat box or through the use of polls.
- Have an option to turn on live auto captions for presenters or those participating.
- Are better than others in terms of ease of use for toggling buttons (e.g. video or microphone) or being 'keyboard only'.
- Will be compatible with screen readers or have 'extensions' that can be downloaded. Your contact at the organisation you're delivering to should be able to offer support if you need it.
- Allow you to 'blur' your background to allow participants to focus better during the session.

When you speak to your contact at the organisation hosting the session, ask about any additional learning needs you should be aware of when delivering.

Your contact will be able to advise if there are any requirements you should be aware of, and can work with you to ensure that the resources are suitable.

For example, some questions to consider:

? **Will everyone be able to read the PowerPoint, or should you ensure you always read and/or explain the slides?**

? **Will all participants be able to hear or understand you, or do you need to factor in additional time for signing or availability of captioning?**

? **How can you best ensure everyone is able to contribute to group discussions? Is it best to encourage participants to use the chat function, or microphone?**

? **Are there language barriers, and how would the group leader normally overcome these (e.g. allowing extra time to explain and understand resources)?**

? **If you are delivering remotely but the rest of the group is present in the same room, will interaction work better if the group feed into a teacher or nominated representative, who feeds discussion points back to you?**

Your contact will know the group best and will have some existing methods of engaging with them. They'll usually be happy to work with you to ensure that everyone is able to engage with the session as fully as possible.

What to share in advance

In advance of your session, the following should be emailed to your contact to refer to, or for them to distribute to the participants if they are engaging virtually.

- **The link/registration process for your delivery.** Ask participants to test their access, sound and connection prior to the session. At this point, invite them to activate any specific tools so that everyone can contribute and get the most out of the session.

- **A copy of the PowerPoint presentation.** This will ensure that everyone has their own copy if required in case there are any problems with screen sharing, or participants need to make any adjustments or view on their own devices. Sharing in advance can also help those with differing learning needs familiarise themselves with the content ahead of time.

- **Any resource sheets that accompany the session as outlined in this guide.** These were initially created with face-to-face deliveries in mind, but they can be adapted and used for virtually delivery. Specific instructions for 16+ years can be found in the **16+ virtual delivery guides** for each session.

- **A request for participants to have a pad and pen to hand, or another way of capturing their thoughts.** During activities, they may be asked to note down ideas before they feed them back.

During your session

Using these tips throughout will help your session run smoothly and ensure your group are engaged.

- At the start, you may wish to do a live microphone test to ensure that those who are comfortable contributing through speech are able to do so. You can do this by reading names off the participant list and asking members of the group to introduce themselves.

  - Remember, some of the group will be more/less comfortable turning on their webcam/microphone, or may have specific requirements that prevent them from doing so. Make sure you offer the chat function as an alternative.

Establish some ground rules. Come to an agreement with your group on how best to participate. When asking the group to participate or respond, use one or more of the of the following digital discussion methods:

- Ask participants to comment in the chat box.
- If most of the group have their cameras switched on, ask those on webcam for a show of hands or use a 'hands up' feature.
- Ask participants to answer using the microphone or camera.
- If your delivery platform has a whiteboard function, you could invite participants to use this.
- Alternatively, if your digital platform offers surveys, you could set up a poll, asking participants to select their answer.

It may be a good idea for participants to keep their microphones muted, or for you to mute everyone's microphones. You can them invite them to contribute when appropriate.

Remember that some of these features may make interaction with those with additional learning needs easier or more difficult.

During your session

- When you speak to your organisation contact prior to the session, ask if there is anything you should be aware of.
    - Consider alternative ways of interacting if necessary (for example, talking through any visuals on the screen rather than asking participants to read them independently, or encouraging participants to raise a hand and speak through the mic, rather than writing in the chat function).

- Encourage participants to ask questions throughout in the chat box for you to refer to and address at natural breaks – this will ensure they stay engaged, which can be challenging on video presentations. If they are not able to write in the chat, invite participants to independently record their thoughts as they go along to raise at an appropriate time.

- Remember that when delivering remotely, it's even more important to invite questions and thoughts from the group to keep them engaged, so allow time and take breaks in delivering to do this.

After your session
Speak to your contact and invite feedback on the delivery of the session. Delivering in this form can sometimes feel less intuitive than face to face, so it's always worth finding out what went well, and considering what changes might be helpful when you next run a session remotely.