

7 Tips for Hosting Virtual OTN Workshops

Community-led document

As the landscape of higher education continues to evolve, virtual meetings have become a key vehicle for communicating the value of OER in our changing times. We have compiled the following best practices for hosting virtual, synchronous or asynchronous, OTN workshops based on input from the OTN community.

We invite you to comment on the document, adding any additional ideas or suggestions you may have.

Thank you to the OTN community members who contributed to the creation of this document: Amy Hofer (Open Oregon Educational Resources), Christina Trunnell (TRAILS - Montana), Anita Walz (Virginia Tech)

Tips for a Successful Virtual Workshop

1. Decide on Format and Platform

- *Which platform is best?* There are a number of different platforms for conducting virtual workshops. Consider the goals of your workshop, and measure them alongside the capabilities and merits of different platforms such as GoTo Webinar, Zoom, Google Hangouts, etc.
- *What format is best?* There are good reasons for synchronous and asynchronous learning. Synchronous learning may be better for rapidly addressing questions sparked by workshop content. Asynchronous learning may be preferable for learners who require a flexible schedule or have limited internet bandwidth.
- *Utilize your IT resources.* Reach out to IT for support in conducting your virtual workshop. They are a great resource for helping you learn the ins and outs of the platform you will be using or other tools such as discussion boards that may also help you reach your goals. You may also want to ask an IT colleague to be on-hand for the workshop, should any technical issues occur.
- *To record or not to record?* The answer to this question will depend on your workshop goals, and may determine which platform is best to use. If you are not recording your workshop, consider scheduling additional workshops at staggered times, or on a Monday/Wednesday/Friday versus Tuesday/Thursday, to accommodate teaching schedules and maximize the number of people who are able to attend live.

2. Confirm Presenters

- *Partner up!* It is best to have two people facilitate a synchronous workshop, as it allows for one person to deliver content while the other handles tasks including monitoring the chat, keeping time, resolving any technical issues, etc. If you will



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be running the workshop solo, planning ahead for questions and creating a strategy for managing the discussion or chat ahead of time is key.

- *Will you feature any guest speakers?* This can be a great way to mix up the content delivery and keep attendees engaged.
- *Practice makes perfect!* Whether you are running the workshop solo, with a partner or with guest speakers, practicing using the technology and running through the presentation is a great way to familiarize yourself with the format, iron out any glitches and build your confidence leading up to showtime.

3. Enable Workshop Registration

- *Require attendees to register for your synchronous event or to record their completion of your asynchronous workshop.* This is valuable for synchronous workshops as you may be able to customize workshop content, discussion prompts, and anticipate attendee questions.
- *Decide on a registration platform.* Use the OTN Data Dashboard's registration function, which then allows you to automatically send review invitations to faculty post-workshop. See the OTN's Data Dashboard [training documents](#) or [video](#) for guidance on how to do so. The Dashboard collects registrants' contact and institution information only. Should you want to collect additional information, you can supplement by linking the to a custom Google Form within the Dashboard, that may include questions regarding their current use of OER, which open textbook they are most interested in reviewing, an option for them to submit questions or topics in advance of the workshop.

4. Market Your Workshop

- *Get the word out!* Depending on your audience, there are a number of ways to promote your workshop including newsletters, institutional or departmental communication channels, or on social media. Please note that we advise against openly sharing webinar or Zoom links on social media in an effort to [prevent hackers from entering and disrupting the workshop](#).

5. Set Your Audience Up for Success

- *Build in time to settle in.* Adding a few unscheduled minutes to the beginning of the meeting can help attendees acclimate to your virtual platform, which may be new for them. This can also be a great time for participants or presenters to introduce themselves.
- *Share basic instructions on how to engage with the platform.* This can help attendees feel more comfortable and able to focus on the content, and empower them to engage in discussion verbally or via the chat.
- *Set expectations* regarding workshop outcomes, level of interactivity, and length of time participants are expected to engage.



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- *Enable closed-captioning.* This increases accessibility and can also be useful should an attendee experience technical issues involving sound.

6. Modify your Delivery Method

- *Keep it short but sweet.* Apply [online teaching best practices](#) to your virtual workshop by minimizing the number of slides you use, and by breaking content down into easily digestible chunks.
- *Engage attendees.* Alternate at least every 10-15 minutes of content with pre-written interactive prompts for polls, short-answer questions via chat, breakout rooms, discussion, etc. If the duration of your workshop is more than 90 minutes, consider offering a short break.
- *Include a Resources slide.* This allows more time to focus on engaging your audience with the content, *and* also encourages further exploration of the topic.
- *Leave time for Q&A.* Set expectations at the beginning of the workshop regarding your preference for questions during the session or at the end.

7. Follow Up

- *Send a follow-up email as soon as possible after the synchronous workshop or completion of the asynchronous workshop through the OTN Data Dashboard.* The Data Dashboard will automate a message requesting that faculty complete a textbook review. Edit the message to also include links to the content from the session such as your slide deck, video clips, answers to any questions that you were unable to address during the Q&A session (consider compiling a FAQ document if you were unable to respond to a number of questions), and your workshop evaluation link.
- *Reach out to those who didn't attend.* Compare the registration list to the list of attendees, making note of anybody who wasn't able to join. Email links to any materials shared, and encourage them to attend future workshops or to complete an asynchronous option.

Additional Considerations

- Adjust as you go and be open to encountering bumps in the road. While we can do our best to prepare, there is always a chance that things may not go as planned. Go with the flow, and use any hiccups to better inform your strategy for subsequent workshops.
- If different groups of attendees will be participating in your workshop, for example, institutions with varying levels of OER support, or who are in different stages of establishing a program, how might this play out? How can you customize content accordingly so that all attendees feel that the content is relevant? Are there particular questions or inequities that may emerge?



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- Will your workshop be open for anyone to attend, or invite-only? If you plan to extend an open invitation, we highly encourage you to enable security measures and/or discuss them with your IT team [to prevent any unwanted guests from attending](#).
- Do you plan to count those who were technically present but appeared as inactive participants on your workshop platform as having successfully attended the workshop?
- While virtual workshops save on travel time and cost, and may expand the reach of your message, it may be that there is less of a personal connection developed with attendees versus in-person workshops. How can you establish this rapport in other ways before your workshop before, during, and after?

Virtual Workshop Examples

Delivering a virtual, asynchronous open textbook workshop; Liz Thompson (James Madison University) and Kyle Binaxas (Richard Bland College)

- [Workshop link](#)
- [Outline link](#)
- [Lightning Talk Notes](#)

Offering a flipped, hybrid open textbook workshop; Jenise Overmier (Marymount University)

- [Workshop link](#).

Lessons learned from a synchronous multi-institution online OTN workshop; Heather Blicher (Northern Virginia Community College) and Anita Walz (Virginia Tech)

- [Summary of Lessons Learned link](#)
- [Workshop recording link](#)

Virtual OTN Workshop slide deck and follow-up information sheet, Christina Trunnell (TRAILS)

- [Post-OTN Workshop Email to Faculty \(includes example slide deck\)](#)
- [Post-OTN Workshop Reference Sheet for Faculty](#)

