

# **Facilitation in Digital Learning Environments**

A companion reader for LRNT 528: Facilitation in Digital Learning Environments

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# Table of Contents

1. Synchronous Online Learning	1
2. Planning	5
3. Designing	9
4. Facilitating	13
5. Follow-up	17



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# Synchronous Online Learning

## What is synchronous online learning?

Many people new to online learning have not yet heard the terms Synchronous and Asynchronous. Quite simply put, synchronous means "at the same time", whereas asynchronous means "not at the same time".

You may already be familiar with examples of asynchronous online activities that often take place in learning management systems, like discussion forums, polls and feedback surveys. Learners participate in these activities at times of their own choosing.

Alternatively, synchronous online describes when people gather together in a web-based space at the same time. Such gatherings often have a facilitator who is responsible for guiding the group's process during their meeting.

There are numerous ways to gather synchronously. The most common are often video-based real-time meetings or webinars using technologies such as Zoom or Collaborate. However, synchronous discussions can also occur using technologies such as chat rooms, text messaging or even technologies such as Google Docs where people are in different physical locations but are collaboratively editing a single document at the same time. That said, most of the time when people talk about synchronous learning, they are referring to real-time video conferences where people gather together in the same virtual meeting room at the same time to participate in some type of event together.

## Why facilitate synchronously online?

There are many reasons why people choose to facilitate synchronously online in educational settings including;

- accessibility for participants (allowing them to learn from home, connect from rural settings, etc.),
- real-time interaction opportunity between facilitator and participants,
- to promote participants' active learning,
- to enable a diverse virtual classroom, potentially with participants from around the world.

In addition, particularly when synchronous sessions are combined with longer, asynchronous online courses, they can;

- drive deeper discussions around course topics,
- build course community among participants and participants/facilitator(s),
- decrease participants' feelings of isolation,
- address participants' concerns or questions at the beginning of the course or points throughout.

Stefan Hrastinski, in his 2008 article ["Asynchronous & Synchronous E-Learning"](#), notes:

*"Synchronous learning, commonly supported by media such as videoconferencing and chat, has the potential to support e-learners in the development of learning communities. Learners and teachers*

*experience synchronous e-learning as more social and avoid frustration by asking and answering questions in real time."*

Though the quote above mentions just videoconferencing and chat, today it could be argued that we rely even more heavily on web-conferencing platforms to support synchronous learning online, and these platforms also offer the benefits described above. And Martin & Parker (2014), in their article ["Use of Synchronous Virtual Classrooms: Why, Who and How?"](#), have noted that "synchronous virtual classrooms via web conferencing systems are increasingly being used in higher education".

## Potential limitations

While there are benefits to learning synchronously, there are some limitations that facilitators should be aware of. These include;

- the difficulty in choosing a time for the session(s) that all participants can attend (i.e. geographically different time zones, work and family schedules etc.),
- the contradiction between what participants have potentially signed up for (e.g. students who choose to learn online for its asynchronous benefits and flexibility) and the planning of accompanying synchronous events which must be attended at a certain time and day,
- increased technology requirements (i.e. bandwidth, webcam, microphone),
- maintaining an accessible environment for all participants.

## Synchronous facilitation skills

Facilitating in synchronous online environments is something that is fairly new to many of us (Jones & Gallen 2016). Jones & Gallen (2016) also indicate that "it is useful to make a distinction between the development of technical competence and the development of practices which facilitate effective learning using such tools" (p. 616). So as facilitators in these environments we must not only learn and enhance our technical skills but our facilitation skills as well.

Jennifer Hofmann, President of InSync Training, a corporation that specializes in "virtual training", argues that there are multiple skills for synchronous online facilitation, which are different than what is needed in the face to face classroom. In her article, ["Virtually There: Developing the Competencies of Virtual Classroom Facilitators"](#), she lists the following areas as crucial for "virtual trainers" to be skilled in.

1. **Digital Literacy.** The ability to find, evaluate, utilize, share and create content using information technologies and the Internet
2. **Virtual Classroom Fluency.** The ability to gauge the success of a virtual activity or conversation by reading digital cues and managing simultaneous conversations.
3. **Cultural Intelligence.** The ability to consider the audience and facilitate interactions that are inclusive and provide needed support for the culturally diverse global audience.
4. **Time Management.** The ability to manage a virtual event in such a way that participants are engaged, desired outcomes are met, and a strict timetable is adhered to.
5. **Application of Adult Learning Principles.** The ability to analyze a blended learning design to ensure the principles of Adult Learning are upheld and program objectives are met.

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## Planning

When planning a synchronous online session you will need to think about why you want to hold the session, who your participants are, and what you hope they will be able to do by the end of the session (outcomes). This type of analysis is necessary to help you design a great session which will meet both your needs and the needs of your participants.

### Purpose

First, think about the overall purpose of the session that you'd like to hold. Why would you like to do it? Some common purposes might be to;

- host a discussion or question and answer session,
- plan or make decisions about something as a group,
- hold office hours,
- build or maintain online class community,
- gather feedback from people,
- interactively teach a topic,
- host a guest speaker,
- model or demonstrate a skill.

Chances are, your synchronous sessions will be part of a longer asynchronous course so you will want to consider how your synchronous session will help you with the purpose and goals of your longer asynchronous course. Here's an example from his 2015 book [Teaching in a Digital Age](#) of how online learning pioneer Tony Bates thinks about incorporating synchronous sessions into a larger asynchronous course.

*"In a fully online course, I also sometimes use Blackboard Collaborate to bring all the students together once or twice during a semester, to get a feeling of community at the start of a course, to establish my 'presence' as a real person with a face or voice at the start of a course, or to wrap up a course at the end, and I try to provide plenty of opportunity for questions and discussion by the students themselves. However, these synchronous 'lectures' are always optional as there will always be some students who cannot be present (although they can be made available in recorded format)".<sup>1</sup>*

Thinking about your session's purpose is a necessary step to confirming whether it makes sense to hold your session synchronously online. For example, if you determine your purpose is to deliver large chunks of content as a lecture, you may ask yourself if that is the best use of all participants' time, or even if it is the best way for your participants to learn. Although there may be a place for the types of webcasts (uni-directional synchronous online learning events), generally they are not the most efficient use of a synchronous session where the aim should be to promote participatory and interactive learning. Perhaps a better strategy might be to prerecord a video with the content, have learners watch it on their own time, and then gather together in a synchronous session to discuss the content.

# Working with co-facilitators

Working with a co-facilitator or a facilitation team to facilitate synchronous sessions can be a useful experience, both to handle "the load", so to speak, and to continue our own learning when seeing each other demonstrate great facilitation skills.

In [Facilitating Live Online Learning](#), Colin Steed notes (p. 54) the following four roles that co-facilitators can play:

- handling technical issues
- ensuring content is available and working
- keeping note of the questions asked in Chat or Q&A panels
- acting as a side-kick

Although the way he frames his advice is to have one leader facilitator and one co-facilitator to act as a producer or host, the roles could easily be shared by two or more co-facilitators equally. This is often what we see in higher education, rather than - as sometimes experienced in the corporate world - one facilitator or presenter and one producer whose role is to support the session more behind the scenes. Particularly when we are facilitating sessions that involve participatory and active learning, it is preferable to add more facilitators to the mix.

Working with co-facilitators does mean that you will need to find time to plan your session together and have discussions about who is going to take on which pieces or which role. Talk about each of your strengths and preferences, and potentially your "stretch goals" - what you'd like to try to get better at when facilitating in this way. Talk about your current technical skills and help each other learn the "techy things" that will help you facilitate a great session.

You may wish to indicate how you have divided your responsibilities between facilitators in your lesson plan or in the notes section of your PowerPoint slide deck, although make sure that you are very familiar with all sections of the session just in case things get mixed up when you are actually facilitating and one facilitator takes another facilitator's slide to discuss.

## Participants

In the planning of your session you will also need to think about your participants. Ask yourself questions such as:

- who will attend this session?
- do they have any common characteristics? how might they be different from each other?
- what is their anticipated technical skill? do they have the computer hardware/software to be able to connect to a web-conferencing system?
- how many participants do I anticipate having in my session?
- when might they be able to participate in the session? (e.g. time zone, work schedules)

Keeping your participants' needs in mind is important in being able to plan for and design a session that works for all who will attend.

## Outcomes

When planning your session it is important to articulate the learning outcomes that you hope your participants will be able to achieve by the end of the session. What do you want them to be able to know/do/value by the time your session is over? Can you use synchronous online learning to help your participants achieve them? Use this step as a check and balance as to whether it does make sense to hold your session synchronously online.

Writing measurable learning outcomes is certainly the subject of a course on its own. But generally you could start with the stem, "By the end of the session, participants will be able to..." and then use appropriate verbs (perhaps using [Bloom's taxonomy to guide you](#)) to try to articulate what you'd like participants to be able to achieve. (Hint: Avoid the terms 'know' or 'understand' as they are not very measurable).

Examples:

- By the end of the session participants will be able to describe why learning from failure is an important part of innovation.
- By the end of the session participants will be able to name the three essential parts of an essay.
- By the end of the session participants will be able to summarize briefly three different change models and their key points.

Caveat: We're not saying the learning outcomes above are great examples of outcomes that would be appropriate for synchronous sessions per se, but they are examples of outcomes in general. It will be up to you to decide if what you're trying to help your participants achieve is something that they can achieve best via a synchronous online mode.

## Know Your Tools

Before we dive into talking about designing your session and the elements that you should consider when doing so it may be useful to talk about the tools that you will have at hand in your synchronous online platform.

While it's not usually effective or recommended to start designing a learning event thinking about the online tools you would like to use and then building your design accordingly, it does make sense to be at least aware of the tools you will have available in order to design a session that is indeed possible to carry out in your platform.

Now, no two web conferencing platforms will be alike, but many will have similar features and tools. For example, most tools will give facilitators and participants the ability to:

- share their webcam and audio
- use a collaborative 'whiteboard' to view and draw/write on
- share screens, including the ability to share a presentation slide deck
- participate in virtual breakout rooms
- create simple polls for participants
- have participants raise a virtual hand or otherwise get the attention of the facilitator
- have a live text chat with others in the room

Get to know the platform that you will be using for your synchronous online work and then have its capability and functionality in your mind as you start to design. Remember, it IS possible to use other web-based tools (such as collaborative documents like Google Docs) with your web-conferencing system by sharing the link in the chat with the participants ahead of time or in the chat.

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## Designing

Designing learning is a big topic overall, but here are some key points that you'll want to consider as you think about designing your synchronous sessions.

### Alignment with your Learning Outcomes

We said earlier that it is important for you to think about your purpose of why you think it's best to hold this particular session synchronously online and to get clear on the learning outcomes that you'd like your participants to be able to achieve by the end of the session. Once you are clear on these items, it's time to think about the content and activities that you'd like to incorporate into your session and how can help support your participants to achieve those outcomes.

### Using a Lesson Plan

Similar to designing to facilitating sessions in person, it may be useful to create a lesson plan to design your synchronous online session and use it when facilitating the session. You may have a lesson planning structure that you are already familiar with using but if not, something like the [BOPPPS](#) framework could be useful.

At the very least it would be ideal to create a plan - perhaps like the table below - that notes timings of all your content and activity sections, duration of those sections, facilitator activities, participant activities and any resources needed. You may wish to script some of what you'd actually say or paraphrase during the session.

Here is the beginning of such a plan:

Time	Duration	Facilitator Activities	Participant Activities	Resources Needed
1pm	5 min	Welcome participants and thank them for coming.	Sitting and listening	
1:05 pm	20 min	Facilitate participant introductions using Five Finger Method	Introducing themselves and listening to each other	Five Finger Method slide

The [Teaching Online Pedagogical Repository](#) (TOPR) from the University of Central Florida also has [four detailed lesson plans](#) that cover four common types of synchronous learning sessions; interactive lecture, interactive lecture with a small group discussion, student interaction and discussion, and problem-solving practice in groups. These are downloadable templates that you can modify for your own needs.

## Build community

Depending on who your participants are and how well everyone knows each other already and if you have some time, you may want to think about starting with activities that can help start to make everyone feel comfortable in the synchronous online space. Even something very quick in a short session could be beneficial to the overall goals of your session.

Some questions to think about as you design your opening activities to build community together include:

- How can the facilitators introduce themselves? If so, what should be shared in that introduction and how much time should it take?
- Should the participants introduce themselves? If so, what should be shared in those introductions and again, how much time should it take?
- How much time should the facilitators spend talking before participants are asked to do something active, such as introduce themselves? (Hint: not very long!)
- What will be comfortable for people to share if they don't know each other? What will be comfortable if they do?

## Think Participatory Active Learning

A good synchronous online session is one that features interaction and a way for participants to engage in participatory, active learning. Thinking about how to design a session that actively includes your participants in contributing to their own learning is our ideal. Some of the questions we can ask ourselves to be able to design these types of sessions are:

- How can I "share the air" with the participants in the session? How can I make sure that the facilitators are not the only ones talking?
- How I can create situations where participants are able to share from their own experiences, to contribute to group learning?
- How can I ensure that the session includes time and space to allow for questions and discussion?
- Are there ways in which I can use the platform's tools (see above) to contribute to an active learning situation, that are appropriate to my intended outcomes for the participants?
- How can I balance content sharing from facilitators with discussion or other participant activities? How can I "chunk" sections of the plan into short pieces, to keep the agenda moving and participants involved?
- How can I engage my participants visually and auditorily during the session?

Overall, thinking about how your participants could be not just passive "consumers" of information that you dump into their heads, but actively involved in the process is a useful lens to keep in mind. As a side bonus: facilitating sessions that are active and participatory often end up being less work for the facilitator and a lot more engaging for participants than the facilitator presenting content the whole time.

## Preparing your participants

When planning your session, think about your participants and if you need to prepare them to come to your session. For instance:

- will they need to watch or read anything before they come? if so, when will you send this to them ahead of time?
- have they participated in this type of session before? do they know what to expect? will they know what is expected of them in terms of participation?
- are they aware of the timing of the session and the importance of arriving on time? (relatedly, it's within your role as the facilitator to start and end the session on time)

## Preparing yourself

What about you, as the facilitator? What might you need to do yourself to prepare to facilitate the session? Some of these items might include:

- being very familiar with your lesson plan or session agenda
- being very familiar with the technology platform you are using and making sure your equipment is working (e.g. computer, headset, webcam)
- thinking about and planning how you're going to stay on time
- anticipating how you could be flexible with the session as it's happening, e.g. if a section takes longer than anticipated, can something be eliminated?
- and, as mentioned earlier, being aware and prepared of how you're working with your co-facilitator

Lastly, expect that you will likely make facilitator mistakes and know that this is a natural process of facilitation, not to mention facilitating synchronously online. Plan to be a professional presence in the session but also make sure that you show up as a real person as well - a human who sometimes makes mistakes, as we all do. Finally, unless the topic is very, very serious, find ways to inject some fun and levity into the sessions.

## Practical considerations

There are many practical considerations you should take into consideration when planning synchronous online sessions. These include:

- considering privacy issues - who will be there? what will be discussed? does the group know each other? will there be trust in the room or does it have to be built?
- distribution and longevity of the session - should the session be recorded? how will it be shared with others, if at all? what might we need to ask or tell participants about sharing the session itself or session details with others? what impact might recording the session have on the participants during the session itself - do people behave differently if they are being recorded?
- logistics - will an advertisement need to be created? how will people register for the session? how will they know how to connect to the session?
- testing the platform - have you used the platform before? how familiar are you with it? do you need to test it again? when? with whom? does anything need to be arranged in advance? does the platform work with your computer system? where will you be connecting from at the time of the session and how good is the internet connection? do you have a headset and is it working?
- your space - what does your space look like where you will be sitting during your session? what can be seen on camera? will pets, children, phones, partners or other noises interrupt or how could those distractions be eliminated or mitigated?
- and, as already mentioned on the previous page, working with a co-facilitator or producer - how will you work together? what will your roles be?

The online article [Interactive Web Conferencing Brings Benefits to the Online Classroom](#) has some additional practical "tips for success" to think about before and during your synchronous session.

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## Facilitating

Let's look now at what facilitation looks like from beginning to end in a typical synchronous online session.

### Session Lead Up

As the facilitator you should arrive early to the platform to set up the environment and make sure you're ready, especially technically (e.g. upload slides, do audio check to test your headset and sound).

You should always facilitate your session from a computer. While technically many platforms have some ability to participate in synchronous sessions via a mobile device or tablet, these are often stripped down version of the desktop or web application and almost always make facilitation more difficult for the facilitator. Keep in mind that you may have multiple screens or windows open when you facilitate, and often small cramped screens of mobile devices and tablets are problematic for facilitators to be able to keep up with everything that is happening in a session.

Decide whether you will informally chat with participants when they come into the virtual space. This works well for more informal sessions, or in sessions where most participants know or are familiar with each other. This helps to set a comfortable tone for the session as well as send a signal to participants that this is a two-way dialectic space as opposed to a one way presentation space. Their input is encouraged.

If it is a more formal presentation setting, you may want to at least come on the screen every few minutes before the session begins, but as participants arrive, to let them know they are in the right space and how long it will be before the session begins as a way to help orient them to the virtual session.

Have some on-screen instructions for arriving participants is also a useful way to orient people to the virtual space, and can provide some practical explanatory visuals on how the virtual environment works; where to find the chat room, how to turn on or off your camera, etc.

Here is an example of a slide used to greet participants in a BCcampus Blackboard Collaborate session. It shows the title of the session so that participants know they are in the correct space and some basic instructions on the tools that will be used in the session.

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## Welcome to Online Learning Basics!

**Audio.** Please keep off unless you wish to speak

**Video.** Camera off saves bandwidth & results in better experience

**Chat & Settings panel**  
Introduce yourself in Chat. The chat is monitored, so feel to use it to ask questions during webinar

Use the **Session Panel** (top left of your screen) to leave the webinar

Use **gear icon** to set up audio & video and/or adjust your settings

Use **participants icon** to see others in webinar

Everyone  
Clint Lalonde 8:40 AM  
Introduce yourself in the chat window

close chat & settings

Open Session menu

Leave Session

## Session Opening

If you have kept your video camera off during the pre-session, start by turning on your video camera to give you a more immediate presence in the space. If you are recording your session, let the participants know you are going to begin recording the session and hit the record button.

It pays to spend a moment before the session to think about what you will say to start the session. Have a warm and friendly greeting when you begin helps you start off confidently and with good energy.

For some geographical contexts, it is customary to begin online sessions with an Indigenous land acknowledgement done from the perspective of the lands you are currently physically located on.

In your opening, you may wish to cover any norms or "ground rules" that you'd like the group to adhere to during the session. A common norm in web conferencing, for example, is for people to keep their mics turned off unless they are actively speaking. Another common norm is to state whether or not chat will be monitored or checked during the session and providing participants the option to use the chat.

Briefly address the purpose of the session and the session objectives or outcomes so that your participants know what to expect. Including an agenda here may be very relevant here.

Finally, you may wish to have participants introduce themselves, or (time permitting) incorporate a small ice breaker activity into your opening depending on the purpose or goal of your virtual session. This is especially important if this is the first of many meetings of a group, for example a group of learners at the beginning of a course who may meet many times throughout the course. An icebreaker or, at the very least, introductions are essential in your first session to begin to establish relationships and develop a learning community.

## Active, Participatory Learning

You will now be facilitating your session plan encouraging active, participatory learning. Hopefully, you've designed a good balance of interactive activities to keep people awake and engaged.

Watch your session plan and the clock closely during your session because - just like when facilitating face to face - you may need to make decisions around either encouraging or reigning in the conversation according to the time you have.

Also, stop from time to time to check in on the chat. There may be a valuable back-channel conversation or questions there that are relevant to the conversation. You may want to have set check-ins where you stop to check the chat. Or, if you are co-facilitating, have your co-facilitator watch the chat and alert you to the conversation or questions in the chat. There are few things more frustrating for learners than posting a question in chat and having the facilitator miss the question.

## Technical Skill and Comfort

If you are solo facilitating, then during your session you will simultaneously have to facilitate and competently manage the technical environment. You may need to give your participants brief instructions about how to use the platform if they are new to it. Remember, if things go wrong (and they often do) keep as calm as you can. You can always ask for assistance from your participants if you really get stuck.

To mitigate any mishaps, it's a good idea to:

- a. spend time well ahead of the session practicing in the platform by yourself or with a co-facilitator or helper, and
- b. think through what you'd do if the technology doesn't work in certain ways. What's your backup plan?

## Visual and Technical Resources

### Slide decks

If you're planning on using a PowerPoint slide deck for your session, make sure you adhere to best practices around putting together slides. (You may enjoy Seth Godin's blog post [Really Bad PowerPoint](#)). Ensure your slides are clear, uncluttered and appealing.

Take advantage of the virtual environment with your slides in ways that are difficult to do face to face. For example, in the synchronous online classroom your participants have the ability to interact with your slides, so think about how you can incorporate some that participants can do something with. For example, can they draw on them? Type a word or short phrase? Highlight something? Circle images on your slide that may describe how they're feeling or think about something? Indicate where they might be on some continuum that you've provided by drawing a line on the screen?

### Modes

Keep in mind that sometimes platforms have different "modes" that you can use to your advantage. For example, Blackboard Collaborate has not only a whiteboard mode which allows you to interact with the whiteboard using the toolbar and show PowerPoint decks, but a screen sharing mode as well. This means that you can visit a website together or share your desktop. Check the platform that you're using to see what the possibilities are.

### Headsets

A technical must-have when facilitating in synchronous online environments is a headset. Often, computer speakers and a built-in computer microphone don't lead to the best sound quality for you or others. If you are doing a lot of virtual facilitation, it pays to invest in a good quality headset.

### Communication

As always, communication skills are important to be aware of when facilitating. Try to maintain awareness about how you are communicating with your participants as you are facilitating. What do you look like on camera when your video feed is on? Do you look confident and comfortable and dressed typically for your work environment or do you look and

sound like you just got out of bed? What about your tone of voice - is it clear and measured? Is your pace effective? You want to feel "authentically you" as you facilitate online but you also may have to purposely focus on maintaining a certain level of energy, just like you would if you were facilitating in person. Don't forget to use humour if it comes naturally to you and is appropriate in the situation.

## Co-facilitation

By this point, if you are working with a co-facilitator or producer for the session, you would have already discussed roles and responsibilities. But recognize that sometimes we co-facilitators can forget our roles. If your co-facilitator jumps in to do a part of the session that you were supposed to do (or you do), just go with the flow. If you are both very familiar with the session plan and are prepared ahead of time to lead any piece of the plan, then this won't be a stumbling block for either of you.

## Session Closing

Just like you would in person, provide a summary or wrap-up activity such as a "check out" to close the session. Thank the participants for coming. You may need to indicate follow up or next steps items, or let participants know that an evaluation will be sent to them.

Lastly, don't forget to stop the recorder at an appropriate point. Make sure all participants have exited the room and then close the session properly.

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## Follow-up

### Following Up After Synchronous Sessions

The follow up that you may choose to do after facilitating your synchronous online session likely will vary depending on the purpose of your session and the content and activities of your session. It also may vary depending on whether the session was "standalone" - an event in and of itself - or part of a longer, asynchronous course, and whether there were people absent that need to be caught up on anything that happened in the session.

Here are some more things to think about:

### Sending out a link to the session recording

If you recorded your synchronous session, sending out the link to the recording is a time-sensitive follow up task. Especially if the session contains information that is either "nice to know" or "need to know" for your participants in order to be able to proceed with the rest of an asynchronous course that the session is a part of, sending out the recording link soon after the session is important. It may also be a good idea to:

- highlight key messages of the session in your follow up email or discussion forum post to give your participants the "quick and dirty" of what was discussed/happened
- include actual timings of when key events happened in the session so that participants can find them easily if they should review them

You may even want to go as far as converting the session into an .mp4 file and chopping it into smaller pieces for your participants to review - it's up to you! Note that in some platforms, such as Blackboard Collaborate, the conversion to the .mp4 file splits the various parts of the session into pieces and only what was visible on the whiteboard is shown in the .mp4. (Some of the "Synchro Sessions" in Week 2 are examples of what this looks like, e.g. Hassan's, Megan's sessions etc.)

### Sending out additional resources

During your session did you (or someone else) promise to send out additional resources after the session? Were any documents or URLs posted in the chat area for all participants that should be shared with others who weren't at the session? These additional resources may also be important to capture and send to participants in an email or discussion forum post after the session.

Additionally, if you used a PowerPoint deck for your session, you may wish to send this out to your participants.

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