

Remote Engagement and Training Toolkit



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Introduction

The value of remote engagement

Oregon is easily one of the most beautiful states in our nation. We all enjoy her rugged coastline, expansive deserts, pristine farmlands and jaw-dropping mountains. But it is these same captivating features that can make traveling to meet in person expensive. The purpose of this toolkit is to help you make the most of remote information sharing, meetings and learning.

One component of meeting the goal of a modernized public health system is workforce strategies that promote skills and experience needed to perform public health duties and to carry out governmental public health's mission. As leaders in developing and maintaining a high-quality public health workforce across the state, all PHD employees have a responsibility to ensure equitable, feasible and appropriate trainings that meet the needs of local public health authorities' (LPHAs) programs and staff.

As of July 1, 2018, PHD staff that work with LPHAs and/or tribes will need to follow the [LPHA and Tribal Training and Travel Guidelines](#).

The Public Health Executive Team, PHD Section Managers and the Conference of Local Health Officials (CLHO) vetted these guidelines. This toolkit offers guidance to maximize remote engagement and training events.

Determining the engagement or training need

An event may be needed, but take a moment to determine its purpose. Is it an informative, collaborative or training event?



Do your participants need information from you?

If so, **sharing information remotely** might be the best option.

You could:

- Call individuals or host a conference call
- Send an email
- Create a newsletter (if information needs to be shared regularly with many recipients)
- Post information to a webpage

See “[Sharing information remotely](#)” section of this guide for more information.



Do your participants need to talk to each other or work together to complete a specific task or goal?

If so, **conducting a webinar or other collaborative meeting** may work best.

You could:

- Host a conference call
- Host a webinar
- Use an online collaborative space such as SharePoint, Gov Space or other
- Call a meeting

See “[Conducting a webinar or other collaborative meeting](#)” section of this guide for more information.



Do participants need to build specific and identified knowledge, skills or abilities?

If so, **a training** is likely what is needed.

Whether you are facilitating face-to-face, via live or recorded webinar or through email, keep the basics in mind:

- Who is your audience?
- What do they need to know?
- What is the best medium to use?
- What is the best method to confirm that your audience received what you provided?

See “[Developing and delivering training remotely](#)” section of this guide for more information.

Sharing information remotely

Engagement needs



Once you determine that you need to share information with your audience, decide the best method of getting it to them. Let's take a closer look at options and the pros and cons of each:

Medium	Pros	Cons
Call individuals or host a conference call	Making a phone call may seem incredibly simple, but this age-old method has many benefits. Phone calls allow you to share information, customize your messages and build relationships. Calls also allow your audience to give immediate and direct feedback. You can tailor the audience from one person to a select group.	The downside of making individual calls is the amount of time it can take, especially when you have multiple calls to make. Individual calls do not allow for multiple people to directly share information. Conference calls can quickly lose the benefits of individual calls due to participants' ability to disengage anonymously.
Send an email	Sending emails is also incredibly simple and common, but this method also has many benefits. Emails allow you to share information; in fact, you can share the same information with one person, a select few or a very large group without significantly more effort or time. Just like phone calls, emails allow you to customize your messages. You could send similar and yet slightly tailored versions of an email to as many individuals or groups as necessary. You can also add attachments or include links to related materials.	The downsides of emails are the lack of direct contact, the sheer volume of emails your audience receives and the increased potential for misinterpretation.

Create a newsletter (if information needs to be shared regularly with many recipients)	Newsletters are a great way to send subject-specific information to a targeted audience on a regular basis. These work well when you have plenty of content to share consistently and an interested audience.	The downsides of newsletters are the time they take to develop, the effort required to maintain the recipient list and the lack of recipients' direct or immediate feedback.
Post information to a webpage	Webpages are a great way of providing information, content and resources to an audience. Once your audience members know where to go, they can get the information and resources they need when they need them. You can make a webpage or website as simple or complex as is appropriate. Webpages can hold large amounts of resources in relatively small spaces by using links to other pages and documents.	The previous three methods of sharing information are active communication methods, meaning you actively reach out to your audience and you “push” information to them. Webpages are passive communication, meaning you place the information and your audience is responsible for going to and engaging with it. Websites take time to maintain and to ensure the material is current and relevant. Websites that are not maintained quickly lose audiences.

Conducting a webinar or other collaborative meeting



Do your participants need to talk to each other or work together to complete a specific task or goal?

Once you determine that a group of people will most benefit by talking and/or working together, you have choices to make about how best to facilitate that encounter. Let's look at options and the pros and cons of each.

Medium	Pros	Cons
Host a conference call	Conference calls allow you to share information, customize your messages and build relationships. Calls also allow for immediate and direct feedback from your audience. You can tailor the audience from one person to a select group.	Conference calls can quickly lose the benefits of individual calls due to participants' ability to disengage anonymously.
Host a webinar	Webinars maintain all the pros of conference calls and add the ability to share visuals. Webinars allow hosts to engage with their audience in real time. You can share a live video of the webinar host, speakers and participants. You can share documents, webpages and even your desktop. And most webinar software programs allow you to choose or customize what you share depending on your objectives. Plan, prepare and practice to do these well. Facilitators can conduct real time polls to gather information from all participants.	Webinar hosts and participants often have a wide range of software capabilities, available hardware and technology familiarity. Successful and effective webinars require planning, preparation and practice. And even with all that, things can go wrong. The more webinars you do, the better you will become and the better prepared you will be to address issues before or as they arise.

Use an online collaborative space such as SharePoint, Gov Space or other	Online collaborative spaces are a great way to share information with a targeted audience. Documents and comments are left on a page that participants can engage with when they choose. Facilitators and participants are not required to be there at the same time. If your collaboration site allows for participant comments, be sure to frequently monitor this section.	Like a webpage, collaboration sites are a type of passive communication. This means you place the information and your audience is responsible for going to and engaging with it. Collaboration sites take time to maintain and to ensure the material is current and relevant. Collaboration sites that are not maintained quickly lose audiences. Facilitators often do not know if participants visit the site or engage with the content.
Call a meeting	Face-to-face meetings allow you to share and receive information, customize your messages and build relationships. Face-to-face meetings offer immediate and direct feedback from your audience. They allow for building consensus, working on projects and meeting objectives. Hosts can tailor the audience from one person to a select group.	Meeting in person can be expensive and time-consuming. It can be hard to travel for shorter meetings. The increased value of participants' time and budgetary concerns require even more planning for face-to-face meetings.

Maximizing the webinar

Here we will focus on making content that inspires learning that is memorable and thus more likely to transfer to the work environment. This is well within your reach. You may be skeptical because you can probably think of 100 webinars that missed these marks completely. We have all been there. But that is why you are going to put in the work to create something that goes beyond the forgettable.

Maximizing the webinar

Hosting a webinar for a group of people is easiest when you know where to start. Most participants have a wide variety of experiences and understandings, so it can be challenging to know where to begin, even with a small group.

Prepare clear webinar descriptions and agendas

One way to address this is by writing the webinar description so potential participants are clear about the webinar content, purpose and scope. That way you can be confident that the group of people who choose to register are informed and ready to participate in the event you described. You can also broadly assume they are equally aware of the content.

Send baseline information

Send some material to participants ahead of time. You could send the agenda, a chapter or article to help participants become familiar with the content, have the same baseline knowledge and be prepared for your starting point.

Send questions

You could send questions to registrants ahead of time and use those questions in a variety of ways, such as:

- Getting to know your participants
- Helping them think through the material prior to the webinar
- Gauging their pre-webinar understanding
- Ensuring content is of interest to the audience

Use this information to tailor content to the audience and members' level of understanding and interest.

Depending on what information you request, you can also choose to either have them hold onto their responses and bring them to the first session or send them back to you prior to the session.

All of these techniques offer facilitators the chance to engage with participants prior to the actual event. These techniques demonstrate to participants that you are prepared and that you will thoughtfully present the material. These pre-event techniques can get people thinking about the topic and feeling engaged before you even say a word. This strategy can make the actual webinar much more effective.

Plan, prepare and practice

Well done webinars do not happen accidentally. They require a lot of thoughtful planning and preparation. Plan for the audience. Plan the content. Build the content in a way that will be easiest for members to absorb and interact with it.

Once you have adequately planned and prepared, then you need to practice.

- Practice what you will say.
- Practice telling stories that demonstrate your points.
- Practice going through your PowerPoint, if you are using one.
- Practice showing videos.
- Practice how you will describe charts and other visuals.

- Practice how you plan to address participant comments.
- Practice with other speakers.
- Practice with the webinar software you will use.
- Practice the audio.
- Practice with your headphones and the microphone you are going to use.
- If you use a webinar host, practice with that person.
- Practice in the space with the equipment you will use during the actual event.

Take notes as you practice. Use your notes to fix any issues you encountered and to put together a frequently asked questions document for your webinar host, other speakers and participants.

During the webinar

As you design your webinar, consider the participants' experience. What will they be doing? You will need to intentionally add interactivity throughout to keep them engaged.

Some ways to engage participants:

- Pose regular questions and polls.
- Use more than one presenter.
- Use a webinar host, in addition to the speaker.
- Use the comment field. Monitor it throughout and respond to inquiries. (This is a great task for a webinar host to manage.)
- Pause for feedback.
- Offer more resources such as documents, books and web links.
- Allow time for discussion.

Webinar participant etiquette

1. **Be heard.** Speak boldly and clearly. Modern noise cancelling microphones suppress soft sounds, so if you speak softly, those on the phone will hear just parts of what you say or nothing at all. As those who speak softly are often thoughtful, your voice is important.
2. **Be tolerant of those who ask you to speak up.** When phone attendees ask you to speak up they are not trying to disrupt the meeting, they are trying to hear you.
3. **If you are asked to speak up, please move closer to the microphone.** By nature, our voice volume doesn't change much, so if you simply speak louder, it usually only lasts a few seconds until your voice goes back to its usual volume.
4. **The moderator should arrive at least five minutes early.** When attendees call in before the moderator arrives, they cannot be sure that they are on the correct call.
5. **Have a secondary way for an attendee to alert the moderator to problems.** The moderator or other meeting attendee should have a secondary way (best by text messaging) to receive concerns about the phone arrangements.
6. **If you are on the phone, please mute your phone when not speaking.** Barking dogs and fast food orders are especially distracting.
7. **If you are on the phone, please don't put your phone on HOLD.** The HOLD music will frequently be transmitted to the rest of the group, really ruining the meeting.

After the webinar

Send a follow-up email

Always send a follow-up email after facilitating a webinar.

These emails should contain:

- A thank you
- A post-webinar survey or evaluation
- Any materials used during the event that can be shared

These emails may contain:

- Additional materials
- Links to additional resources
- Post-webinar understanding questions (Only send these if you sent pre-webinar understanding questions. You would compare the pre- and post-answers to help gauge knowledge transfer.)
- Next steps
- Dates of next webinars

Developing and delivering training remotely

Training need:



If you determined that training is needed, then this section is for you.

Whether you are facilitating synchronous learning face-to-face or via live or recorded webinar, or you are training through an asynchronous e-module — keep these basics in mind:

- Who is your audience?
- What do they need to know?
- What is the best medium to use?
- What is the best method to confirm that knowledge transfer occurred?

Every adult learner has a different motivation for attending a professional training session. Some learners will be engaged before you say a word, others may buy in later after you win them over, and others have no intention of actively participating no matter what you do. This is true for all learning settings, but is hardest to address remotely.

Build your training to share content, not to defend against those who never came to learn.

Determining the training medium

With so many training delivery options, which method is best for you, your audience, your technical support team and your budget? Let's look at some options.

Synchronous versus asynchronous

Synchronous learning refers to learning events where the instructors and students are engaged in learning activities at the same time. Traditional classroom instruction is the most common synchronous learning type. The instructor and students are together in the room at the same time. Webinars have emerged as another common synchronous learning activity. The instructor and students are participating in the learning event at the same time, even though they are not physically in the same room or even the same city.

Asynchronous learning events are those where the instructor and students do not engage with the learning activity at the same time. Online modules are a common type of asynchronous learning. The instructional designer builds the module and posts it to the web. Students may access that content anytime. Many schools use asynchronous learning software where instructors can post course materials, host discussions, and collect and grade assignments. All of this can be done at both the instructor's and student's convenience. YouTube is another example of this. Someone posts a video and viewers access the video.

Both methods work well to promote learning, but each has pros and cons. Here are some common training methods and considerations for each:

Synchronous learning

Face-to-face, classroom, traditional	
*Time to develop (hours per one hour of instruction):	38
Number of participants:	Depends on room size and depth of needed knowledge transfer.
Typical outcomes:	Instructor/facilitator and students participate in learning process together. This medium has potential for fullest interaction, engagement and detailed instruction. Students can ask questions and instructors can adjust instruction as appropriate in real time to maximize learning.
Optimal uses:	Organization is responsible for ensuring participants gain knowledge, skills or abilities. Information is complex and requires developing cognitive skills. The skill is a core competency that may affect multiple areas of performance. The students can easily attend. The benefit of the training far outweighs any potential cost, including experienced and/or engaging facilitators and an environment where learners can concentrate on the target material.
Notes:	Common software used to develop and present content are Microsoft Word, PowerPoint, Excel or equivalents. Facilitators may use other instructional tools such as flip chart paper, white boards, note cards, games, role play, nametags or sign-in sheets. Materials are often printed, emailed or available online.

Live, instructor-led, webinar (virtual)	
*Time to develop (hours per one hour of instruction):	28
Number of participants:	Unlimited, unless software limits capacity

** Time to develop (hours per one hour of instruction) data per ATD 2017 Study*

Knowledge transfer assessment:	Instructor is an expert and/or content facilitator and determines successful knowledge transfer. Participants receive certificate of understanding or completion by email at training conclusion or shortly after via learning management system or other training tracking system.
Typical outcomes:	Instructor/facilitator and students participate in learning process together. This medium has potential for fullest interaction, engagement and detailed instruction. Students can ask questions and instructors can adjust instruction as appropriate in real time to maximize learning.
Optimal uses:	Best for sharing information and simple to moderate learning, such as set-by-step software instruction or answering questions about previously adopted practices.
Notes:	Common software used to develop content are Microsoft Word, PowerPoint, Excel or equivalents. Common software used to present content are Skype for Business, Adobe Connect, Microsoft Live Meeting or equivalents. Additional resources and materials are often emailed or available online. Select webinar software that works well for presenters and participants. Test it multiple times prior to hosting an actual webinar. Also consider what software your organization's technical support team supports. You may have found something neat, but without tech support, you may encounter unexpected obstacles and not have a way around them.

Asynchronous learning

Level 1: Passive

*Time to develop (hours per one hour of instruction):	42
Number of participants:	Unlimited
Knowledge transfer assessment:	The e-module or learning management system generates the certificate of understanding or completion.
Typical outcomes:	Learner receives information.
Optimal uses:	Best for sharing a set of information with many people.

* Time to develop (hours per one hour of instruction) data per ATD 2017 Study

Notes:	This is passive e-learning where the learner acts simply as an information receiver. Common software used to plan and design content are Microsoft Word, PowerPoint, Excel, Photoshop, Audacity or equivalents. Common software used to deliver content are Adobe Captivate, Lectora, Articulate Storyline or equivalents. Additional resources and materials are often emailed or available online. These courses may be posted to a website or uploaded into a learning management system.
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Level 2: Limited

*Time to develop (hours per one hour of instruction):	71
Number of participants:	Unlimited
Knowledge transfer assessment:	The e-module or learning management system generates the certificate of understanding or completion.
Typical outcomes:	Learner demonstrates movement through the information. May include questions.
Optimal uses:	Best for teaching simple concepts and skills to many people.
Notes:	This is defined as limited interactivity, with the learner offering simple responses to instructional cues. Common software used to plan and design content are Microsoft Word, PowerPoint, Excel, Photoshop, Audacity or equivalents. Common software used to deliver content are Adobe Captivate, Lectora, Articulate Storyline or equivalents. Additional resources and materials are often emailed or available online. These courses may be posted to a website or uploaded into a learning management system.

Level 3: Complex

*Time to develop (hours per one hour of instruction):	130
Number of participants:	Unlimited

* Time to develop (hours per one hour of instruction) data per ATD 2017 Study

Knowledge transfer assessment:	The e-module or learning management system generates the certificate of understanding or completion.
Typical outcomes:	Learner demonstrates movement through the information and often is required to demonstrate understanding via activities and questions.
Optimal uses:	Best for teaching simple to moderate concepts and skills to many people.
Notes:	This level has complex interactions that ask the learner to make multiple and varied responses to cues. Common software used to plan and design content are Microsoft Word, PowerPoint, Excel, Photoshop, Audacity or equivalents. Common software used to deliver content are Adobe Captivate, Lectora, Articulate Storyline or equivalents. Additional resources and materials are often emailed or available online. These courses may be posted to a website or uploaded into a learning management system.

Level 4: Real-time

*Time to develop (hours per one hour of instruction):	143
Number of participants:	Unlimited
Knowledge transfer assessment:	The e-module or learning management system generates the certificate of understanding or completion.
Typical outcomes:	Learner demonstrates movement through the information and must demonstrate understanding via activities and questions.
Optimal uses:	Best for teaching simple to complex concepts and skills to many people.
Notes:	These real-time interactions create life-like sets of complex cues and responses. Common software used to plan and design content are Microsoft Word, PowerPoint, Excel, Photoshop, Adobe Animate, Audacity or equivalents. Common software used to deliver content are Adobe Captivate, Lectora, Articulate Storyline or equivalents. Additional resources and materials are often emailed or available online. These courses may be posted to a website or uploaded into a learning management system.

* Time to develop (hours per one hour of instruction) data per ATD 2017 Study

Developing training content

While remote education is a specialty, the basics are the same for all educational content development. Here are a quick-start guide to get you headed in the right direction and our training standards manual for a deeper dive:

- [Quick-Start Guide to the DHS and OHA Training Standards](#)
- [DHS and OHA Training Standards Manual](#)

Additional resources

Sharing information remotely



Emails

- [Email tips: Top 10 Strategies for Writing Effective Emails](#)
- [17 Professional Email Tips for Better Results in 2017](#)

Newsletters

- [19 Tips for Great Email Newsletter Design](#)
- [7 Tips for Creating More Engaging Newsletters](#)

Web Pages

- [Top 10 Tips to a Great Web Page](#)
- [10 Tips that Can Drastically Improve Your Website's User Experience](#)

Conference Calls

- [10 Tips for a Successful Conference Call](#)
- [12 Tips on How to Conference Call Like a Boss](#)

Conducting a webinar or other collaborative meeting



- [18 Tips on How to Conduct an Engaging Webinar](#)
- [How to do a Webinar Your Audience Will Love](#)
- [The Ultimate Guide to Webinars: 37 Tips for Successful Webinars](#)

Developing and delivering training remotely



- [How I Messed Up a Remote Training Session \(and What I Did to Ace the Next One\)](#)
- [Best Practices for Delivering Virtual Classroom Training](#)
- [35 Tips for Significantly Better eLearning](#)



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