

# About the CEF

The CEF is an international organization with the mission to support the capacity development of public officials and their institutions in South East Europe through learning and knowledge sharing. We are a leader in applying people-centered learning approaches and holding the know-how of becoming and being a learning organization. We work with our constituency to support their public financial management, tax policy and administration, and central banking reform efforts.

**TOGETHER  
WE CAN  
MAKE THINGS  
HAPPEN**



## How Online Collaboration Can Strengthen the ERP Process

**GUIDELINES FOR FACILITATING  
ONLINE LEARNING, KNOWLEDGE  
SHARING ACTIVITIES AND MEETINGS**



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Funded by the  
European Union

Implemented  
by the CEF

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# About the Guidelines

We have prepared these guidelines for experts who work on strengthening the capacities of line ministries to measure the fiscal implications of structural reforms, colleagues involved in the preparation and implementation of the Economic Reform Programme (ERP), and others involved and interested in delivering effective online learning activities or meetings.

In our Guidelines for Experts<sup>1</sup> »How Learning and Knowledge Sharing Can Work for You«, we explained how learning takes place at the CEF when we meet in person. As learning and knowledge sharing have moved online, we have received many inquiries for support of online collaboration and learning within institutions. As our response, we have captured here our experience in designing and delivering online learning and knowledge sharing events, and we have put it in the context of our partners in the line ministries and ERP process participants.

The development of the ERP in a specific country is a highly collaborative process across a large number of line ministries and government institutions, reaching out also to businesses and academia. The process involves several specific stages: economic analyses and projections, identification of obstacles to growth and competitiveness, compiling a set of structural interventions, and undertaking reforms.

The ERP development also requires close cooperation and support from the top leadership in the line ministries and at the European Commission, as

<sup>1</sup> [https://www.cef-see.org/files/hlakscwfy\\_2020.pdf](https://www.cef-see.org/files/hlakscwfy_2020.pdf)



the programme needs to be adopted by the governments and then assessed and discussed by the Economic and Financial Affairs configuration of the European Council, in a process that is very similar for the EU member states. Carrying out this process online is a challenge indeed. Yet, collaboration is key to the ERP success.

We hope that these guidelines will help you explore the landscape of the online world and examine different approaches to learning and knowledge sharing. Use them for inspiration, knowing that it is impossible to capture the rapidly developing online world at once and in one place.

#### These **guidelines** contain:

- tips and tricks that can help you plan an online event,
- do's & don'ts of what works and what does not in an online environment, and
- tools that can help achieve your objectives and increase interaction.

#### However, these **guidelines** are not:

- a manual for preparing an online event,
- set in stone, but rather a forever changing and developing sea of options and tools available at your fingertips.

We hope that you will find these guidelines useful and wish you luck with your online engagement!

CEF team

PART  
ONE

# ONLINE LEARNING AND COLLABORATION – WHAT IT IS AND HOW IT WORKS



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Many terms are used to refer to learning, knowledge sharing and collaborative activities delivered in an online environment. These include **e-learning, virtual, distance, digital or online learning**. For consistency reasons, in these guidelines we describe as **online** every activity that is not happening in a face-to-face format, and **activity** as any online learning and knowledge sharing activity (webinar, online course, hybrid event, live stream event, etc.) or meeting. Where needed, we point out the specific use for meetings.

Online learning refers to any type of learning that occurs through electronic technologies and media. Most often, it takes place in the form of online courses or webinars.

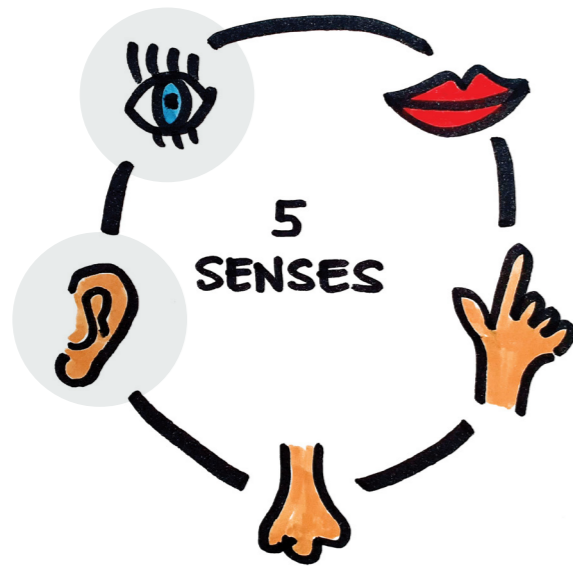
Online learning solutions are flexible and convenient. They are also efficient and often cheaper compared to face-to-face learning options. One may, however, get easily frustrated by only online learning and teaching, without being able to discuss problems with peers. With this in mind, we offer some examples and good practices for interacting and keeping in touch with your audience.

The collaboration between the event facilitator and the technical and coordination support and set-up helps make all run smoothly, while the collaboration with and among the participants is what makes the activity meaningful, engaging and easy to follow.

# Our Senses in Online Learning

The five senses of hearing, touch, sight, taste and smell play an integral role in learning. In face-to-face learning, senses allow us to experience all five learning modalities. In an online environment, however, we are limited to **visual** and **auditory** senses. That is why it is important to present content in a visually compelling format and offer ample opportunities for our participants to listen to expert presentations and discuss them afterwards.

On the following pages we have listed and explained several approaches on how to make the best of the online activity by **focusing on the two most affected senses.**



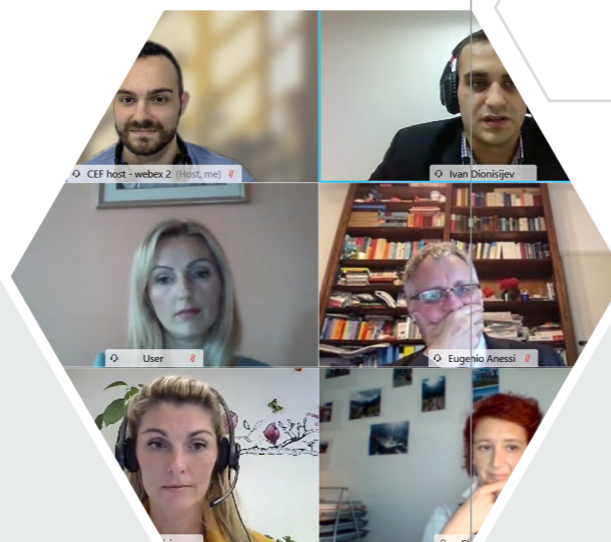
# Online Environment and How to Conquer It

In online environment, the facilitator carefully creates opportunities for the participants to learn the skills, and designs assignments and learning activities. As a facilitator, you also need to create and maintain a safe learning environment, while keeping the focus on the tasks, steering conversations and reacting to the voice and inputs of the participants. The role is the same in an online and in a face-to-face environment, only that in the online environment, with the camera filter and many distractions available, the facilitator's job gets much more challenging.

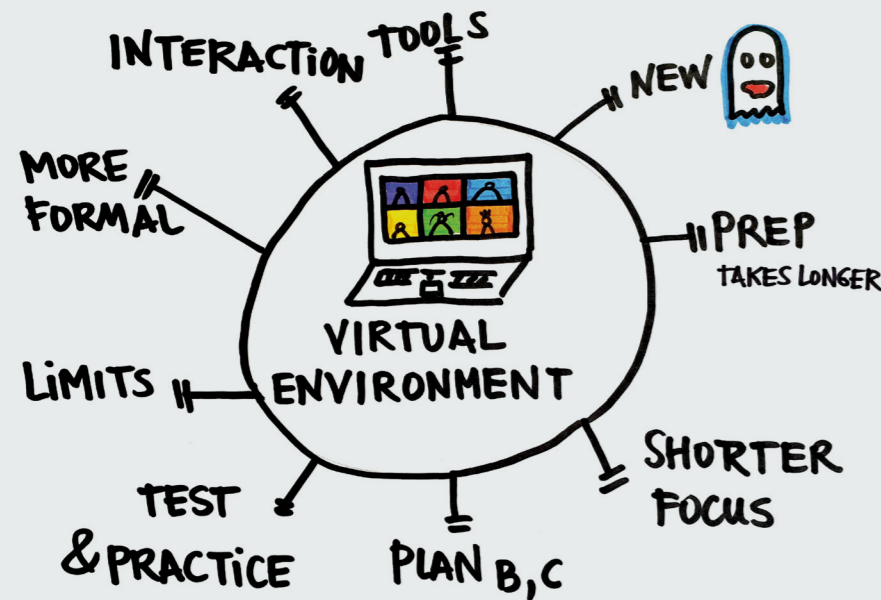
For a successful online learning experience, it is important that we as online facilitators assist participants in their own learning, and help them connect the bits and pieces of the discussed subject matters into one coherent story. It is equally important to ensure that our participants are **interacting** with the learning content by using polls, chats, group work in breakout rooms, and similar. The more we keep our participants engaged, the less likely they are to click away in the internet maze and lose interest. This is why we need to prepare in detail for our online sessions, develop carefully the learning materials, set up extra tools and games, and be ready with a backup plan in case of any technical issues.

It is also crucial to understand well the **characteristics of the online learning environment** as simply converting an existing face-to-face course into an online event will not bring about the desired learning outcomes. We need to focus on the structure and purposefully organize the course for the new environment, taking into account the following recommendations.

- Select a secure, **easy-to-use and quick-to-install online learning platform** (taking into consideration different institutional restrictions that participants may experience with using external applications). Currently, the most used are [Teams](#), [Webex](#), [Zoom](#) and [Google Meet](#).
- **Participant's attention span** is much shorter than in a face-to-face event. This requires the content to be presented in smaller, user-friendly, bite-size pieces (segments of 10-15 minutes) in combination with interactive elements that make participants engage, think, react and respond to the addressed subject matters. See *Part Two* of these guidelines for tools and methods that you can use to better engage with your participants online.
- To **keep the participant's attention**, use interesting graphics in your visuals and limit yourself to one or two clear messages on each slide. Bear in mind: it is better to use audio and graphic elements (as one complements the other) than, for example, audio and text, which causes cognitive overload.



- The physical distance may have wiped away some **formal boundaries** between people who do not know each other, but the appropriate addressing and business etiquette nevertheless still apply. See the **Business Etiquette Online** section for rules that should be followed.
- **Plan B and C.** Always prepare a backup plan, because the unexpected happens. This is especially important when hosting a guest speaker who is key to the program.
- It takes approximately **3 times longer to prepare for an online session** than it does for a face-to-face event. It is crucial to test **everything**: tools, presentation, screen sharing, timing, interactive elements, sound, light positioning, etc.
- **Team up with technical support people** to have them walk you through the online learning platform that you are using. Always test beforehand and use only those tools for facilitating any online activity that you have a solid understanding of how they work. It is important that you feel comfortable with the chosen methods and tools to successfully deliver the announced learning objectives.



**PRESENTATION TOOLS**

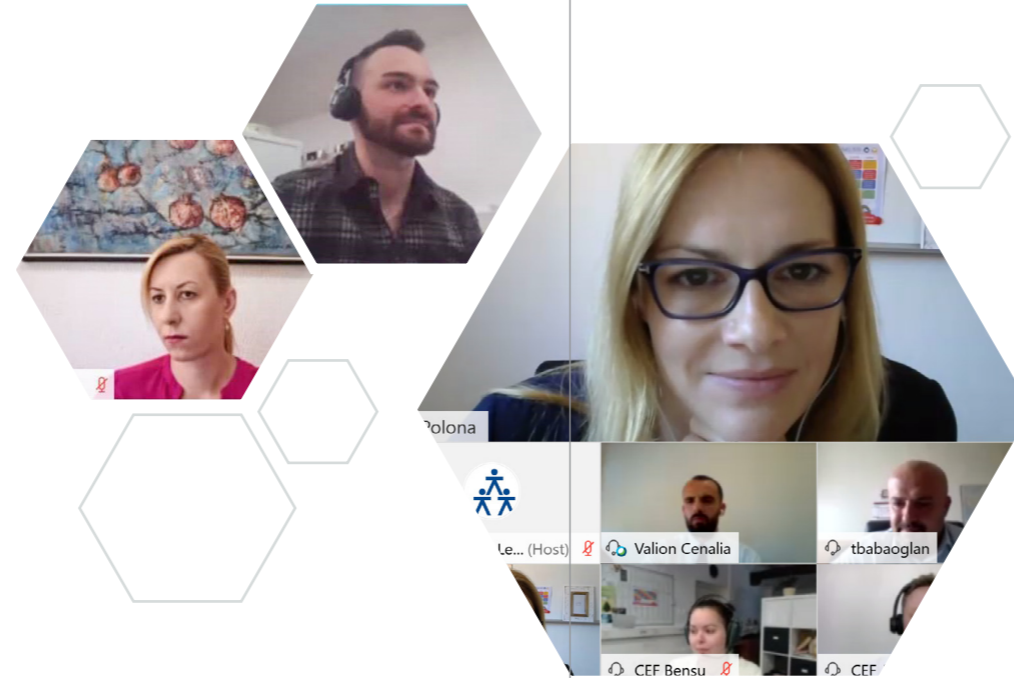
- There are many alternative tools to PowerPoint, offering more user-friendly solutions and easy design. Explore some options to bring innovation and creativity into your presentations.
- **Prezi** is one good option to present your content; it allows even adding video presentations. With **Canva**, you can design beautiful slides with quality templates. **VideoScribe** is a user-friendly software that lets you animate your ideas. You can also combine your presentation and audience interaction with tools like **Mentimeter**, **Miro** and **Google Slides**.



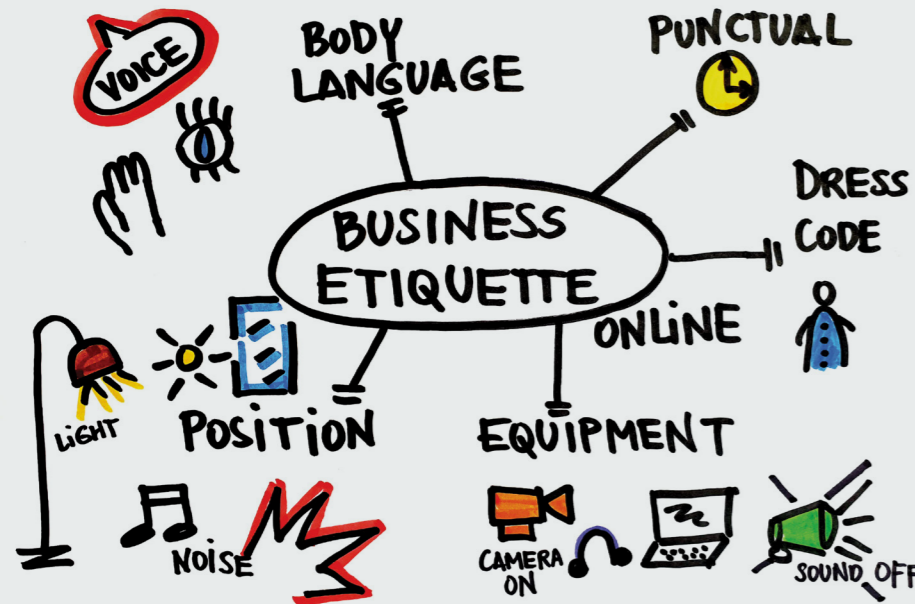
# Business Etiquette Online

By following online business etiquette, your presence and appearance on screen will remain consistent and professional.

- It is not acceptable to be late for a meeting or a learning activity. Open web rooms 15–20 minutes earlier, allowing participants to join and test their connections and sound before the official start.



- Raise your hand virtually to let people know you that want to contribute without interrupting the conversation. You may also indicate your wish to speak by raising your hand in front of the camera – this may, however, be less visible, if there is a large number of participants.
- It is appropriate and desired that the facilitator and participants have their cameras on.
- Turn off the microphone when you are not speaking.
- Avoid excessive physical movement. Many gestures that go barely noticed in person become the focal point of the camera pointing at your upper body.
- Leaning forward as you are communicating shows interest and attracts your audience.
- Online events permit a less formal dress code; nevertheless keep your look neat and professional.



## MAKE A PROFESSIONAL IMPRESSION WHEN YOU CONNECT ONLINE

- **Position your camera at or just above the eye level.** If you use a laptop, place something beneath it, so that your eyes are at the same level as the camera lens.
- **Adjust properly the light intensity and direction.** Place your primary light source behind your camera. This way, the light and the camera point in the same direction and illuminate your face. Avoid having natural or artificial light in the background, which makes your face appear dark and less visible.
- **Make sure that your background is clutter free and professional.** Cluttered backgrounds can distract those on the other end of the camera and make you look disorganized. You may also use background pictures or blurred backgrounds made available by online platforms.
- **Soundproof your space as much as possible** by, for example, using headphones to minimize outside noises.
- **Use smaller earpieces that make the visual more realistic,** compared to big noise-canceling studio headphones.



## Do's

We gathered some tips for facilitating online sessions. See what works well and consider it during your next online activity.

- **Have your camera on at all occasions and mute your microphone when you are not speaking.** Encourage that all participants do the same.
- **Acknowledge the presence of the participants.** Look at the camera, not at your slides.
- **Have a clear goal for your presentation** or learning activity and stick to it.
- **Use external tools and applications** (polls, quizzes, feedback questions) to keep the participants engaged. Have backup questions ready or agree with some participants upfront, in case the group is not very talkative.
- **Give clear** instructions for any assignments or activities, and check if the instructions were understood.
- **Make breaks** to allow participants to grasp the content easily.
- **Make the roles, goals, ground rules and expectations clear.**
- **Have a co-host or a co-facilitator when conducting an online activity.** When sharing a screen, it is difficult to manage all by yourself (monitor participants' reactions, check the chat function and raised hands, etc.).
- **Prepare and practice your interactive elements** before the session starts.
- **Use time wisely.** While waiting for everyone to join, use that time and engage participants in a short tone-setting exercise to let them get to know each other and become familiar with the basic features of the online platform.



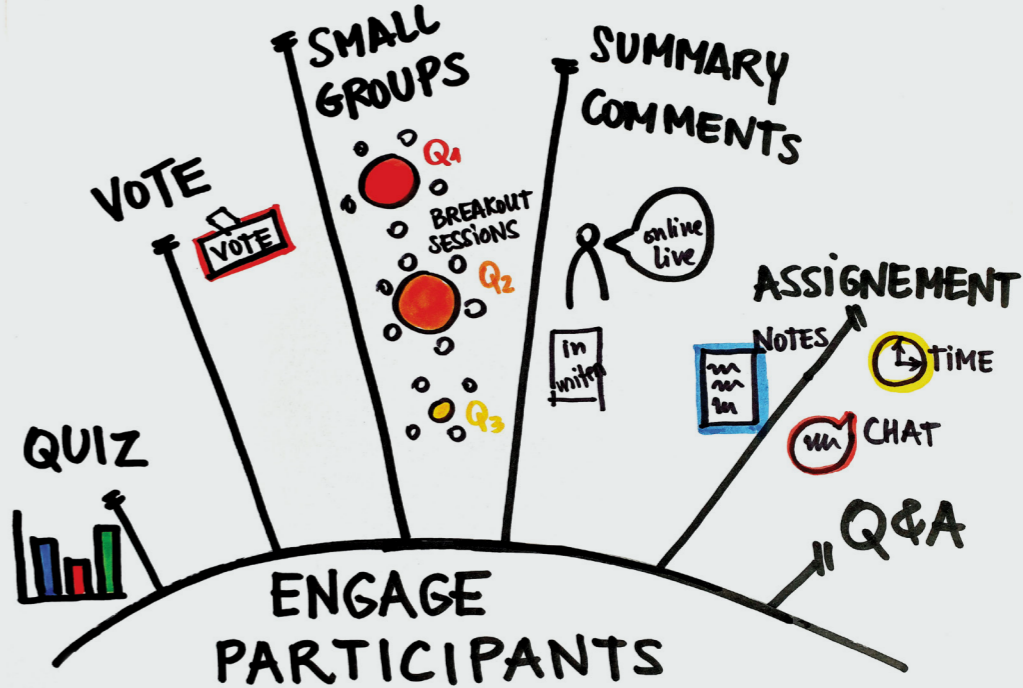
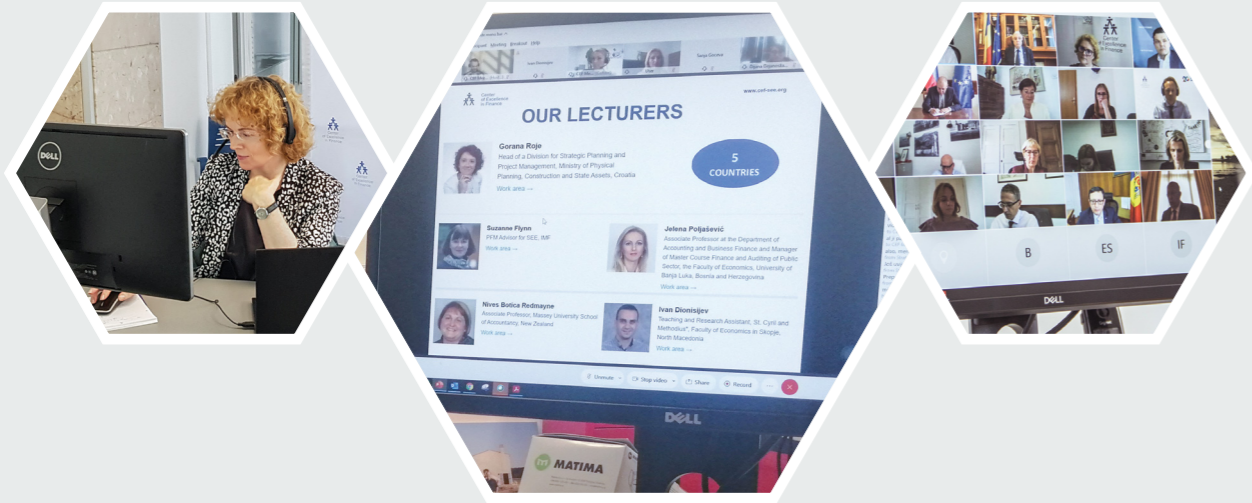
## Don'ts

When facilitating an online session, there are behaviors to be avoided. See our tips what not to do in your online activity.

- **Be late.**
- **Exceed the announced length** of the activity.
- Make the presentation too complicated or too long. Keep in mind that the attention span in an online environment is shorter than in face-to-face presentations.
- **Give participants too many excuses to leave** the presentation, so use hyperlinks sparingly not to overload them.
- **Let a participant take over the stage with off the topic comments.** You may politely interrupt the participant by saying, "That is an important topic that is beyond the scope of this meeting. I will e-mail you when we wrap up." It is your role as the facilitator to guide everyone through the session.
- **Forget to announce that you are recording** the online session.
- **Just copy someone else's facilitation tips.** Try things out yourself and use whatever feels natural and familiar to you.
- **Get lost by using too much technology.** Technology is great but using too many methods or tools will overwhelm you as well as the participants. Focus on a few solutions and use them wisely.
- **Forget to have your IT support available.**
- **Forget to ask for feedback** and use it to improve your materials and delivery.

PART TWO

# CREATIVE SOLUTIONS FOR FACILITATING ONLINE ENGAGEMENT AND COLLABORATION



Engaging the participants has always been the goal of learning facilitators, and it may sound easier than it actually is. When we are in the same room, facilitators easily spot the low-energy moments and do something to prevent the participants from drifting away in their own thoughts.

In an online environment, through the filter of a camera, muted sound and a click away from the internet maze, it is more challenging to see, think and feel how the participants are doing, and reach out to keep them active and interested.

On the following pages, we share some examples of how to use selected methods and tools that can help you keep attention and involve your participants in peer-to-peer learning in the online environment. Always decide first on which engagement method you will use and only then choose the tool(s) that support the method. Selecting only a few tools for each learning event is a good practice: participants will focus on the topic instead of learning how to use different tools. Remember, tools are there to support the learning process, not to distract it.



# Examples of Online Interaction Approaches with Recommended Tools



## TOOLS TO EASILY DEFINE THE RIGHT TIME OF AN ONLINE ACTIVITY

The right timing of your online activity may have an important effect on its success and attendance. To do this, you can use free online meeting scheduling tools, such as [Doodle](#) or [NeedToMeet](#). Both tools simplify the process of scheduling by sharing everyone's availability.

When meeting participants from different countries (and continents), be mindful also of the different time zones and timings during the day. You can use [TimezoneWizard](#) to quickly ensure that your time information is accurate.

**Doodle**



1

## QUICK CHECK-IN

Recommended tool: Chat function



### WHAT IT IS

Performing quick check-ins keeps your audience on track and engaged. It is important to check in with your online participants during a presentation, as you often do not see or hear their reactions.

### HOW IT WORKS

A good rule of thumb would be to check in at least once in 10 minutes or after every 2–5 slides of your presentation.

Using short yes and no questions, brief brainstorming or responses to a statement is a great way to wake up the participants and get them back on track. The activity takes about 1–2 minutes each time you check in.

### TOOLS

The CHAT function in your preferred meeting platform ([Zoom](#), [Webex](#), [MS Teams](#)) offers a quick and user-friendly solution. It is also very flexible as you can use it any time.

Alternatively, you can use other tools that support Questions & Answers, quizzes and audience responses, like [Mentimeter](#), [Slido](#) or others.

### TIPS

It is recommended to do a check-in with participants that do not work frequently together, for example in meetings at the beginning of the ERP cycle.

Ask a quick check-in question right at the beginning of the meeting, so that participants get used to using the chat.

Participants like to be involved and enjoy having a special role or assignment. So you could ask one or two persons to monitor the chat discussion, take notes or act as time-keepers.

KEEP IT SIMPLE



SET THE RULES



SELECT THE TIME / TIMEZONE



TAKE BREAKS



RECORD THE MEETING / WEBINAR



USE CHAT FUNCTION



USE POOLS AND QUIZES



TEST TEST TEST



## 2 BRAINSTORMING (idea generation)

### Recommended tool: Jamboard



#### WHAT IT IS

Brainstorming provides an open environment for generating ideas and coming up with creative solutions to problems. Allow sufficient time and space for participants to think about the selected topic and let them focus on the issue without interruptions. Make also sure that someone captures their thoughts in writing.

#### HOW IT WORKS

Brainstorming can be applied to any topic (challenge, question) when you want the participants to generate a large number of ideas quickly. Clearly define the problem that you want the participants to solve, and make it clear that the objective is to generate as many ideas as possible. Give them some quiet time to generate as many of their own ideas as they can. All ideas are welcome and acceptable.

Then ask them to share or present their ideas, while allowing everyone to contribute. Once everyone has shared their ideas, start a group discussion to develop other people's ideas and use them to create new ideas and solutions to the outlined problem. The activity takes at least 15-20 minutes.

#### TOOLS

Google [Jamboard](#) offers an online space where all participants can add their inputs on a common whiteboard. Participants write their responses on virtual post-its and leave them on a whiteboard. The facilitator can, in the second brainstorming stage, arrange them in clusters.

Alternatively, you can use other whiteboard tools, like [Miro](#) or [Mural](#). For quick brainstorming, also the CHAT function can be used.

#### TIPS

It is important to give participants room for idea generation and thought sharing. For example to encourage thinking about a more efficient or clearer ERP process.

Explain the functions of [Jamboard](#) by showing it on your screen, and share the link to it in the chat section of your meeting. Make sure you share the link that allows all participants to edit the board.

## 3 FEEDBACK COLLECTION

### Recommended tool: Mentimeter



#### WHAT IT IS

This is a reflective method that captures thoughts and impressions of a particular learning session through an online voting and feedback system. As this activity is typically the last item on the agenda, do it in a light-hearted way.

#### HOW IT WORKS

Prepare a series of multiple-choice or open-ended questions and check participants' feedback at the end of the online session. The received feedback can help you design the next session or course and/or follow up on issues brought up by the participants. The activity takes 3 to 5 minutes, depending on the number of questions.

#### TOOLS

[Mentimeter](#) is a multi-function online tool for audience engagement. It offers great options for different questions to make your feedback collection interesting. One of its best features is the possibility of showing the questions and live results on your screen.



Share the link to the [Mentimeter](#) question in the chat and then share the Menti presentation on your screen, so that the participants see the questions and results.

Alternatively, you can use [Survey Monkey](#) or [Typeform](#) if you intend to review the received feedback later. An integrated [Zoom](#) or [Webex](#) polling feature is also a good option.

#### TIPS

Gathering feedback is a key step in any collaboration process. It is important to share feedback in different stages in the ERP process. For example, an organized questionnaire for officials at the end of the cycle might provide insight for future improvements.

Ask an introductory question to show participants how to use the tool. Use diverse question styles (multiple-choice, text entry, ranking or scales questions, word clouds) to make the session more interesting.

## 4 QUIZ

### Recommended tool: Kahoot

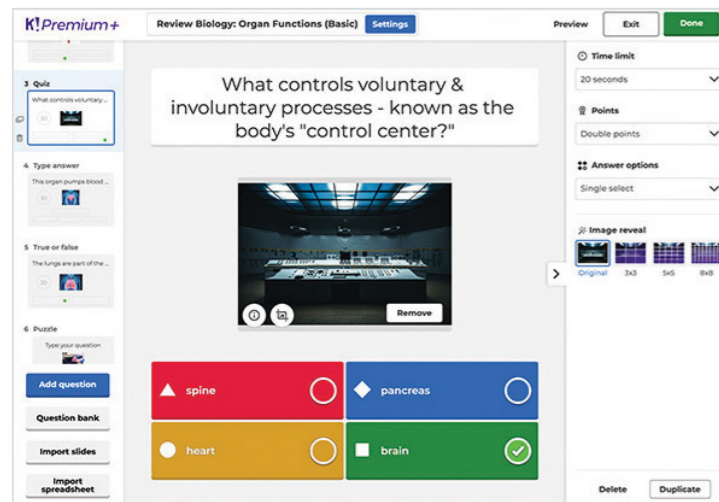
#### WHAT IT IS

A quiz is a great way to introduce some healthy and fun competition into your online learning event. Depending on your goals, you can use a quiz to check participants' understanding, repeat some key concepts, or just have some fun.

#### HOW IT WORKS

Quiz questions should be multiple-choice with one (or more) correct answer(s). Making the questions short and time-based (a quicker response brings more points) is a good way to get higher engagement. To make the quiz a relaxing experience, introduce some fun and easy questions.

Make sure you have a test question, so that all participants know how the tool works. Some people might get quite competitive, so make sure the participation rules are clear.



## Kahoot!

#### TOOLS

**Kahoot** is a great tool for fun quizzes. It has many options for interesting types of questions and all the functionalities to make the quiz competitive (timer, points tracker, adding participants' names). In addition, this tool is visually appealing.

**Mentimeter** and **Ahaslides** also have good options for quizzes.

#### TIPS

Using a relaxed way to check the understanding of the ERP Guidance and the timeline can be a pleasant experience for all participants.

Trick questions that lead participants to the wrong answers are always a good conversation starter. For some excitement, introduce a »lightning round« of a few very short and easy questions.



## 5 GATHERING COMMENTS

### Recommended tool: Padlet

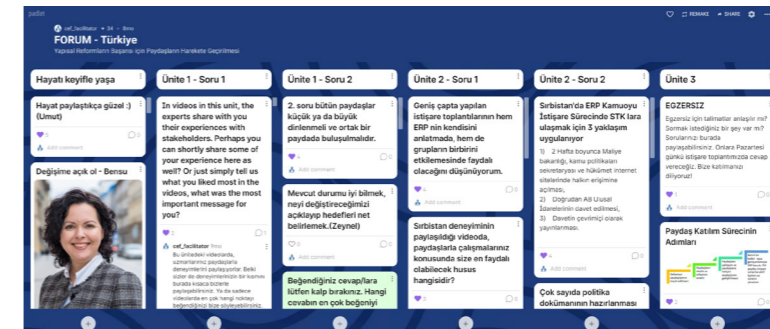
#### WHAT IT IS

Asking participants to comment on specific topical points, statements or documents is a good way to deepen the learning process. This gives them a chance to share their thinking and knowledge with peers.

#### HOW IT WORKS

Firstly, you need to choose the topics, statements, questions or documents that will be the subjects for commenting. These can be predetermined or chosen together with the participants (for example, in a brainstorming session).

When you have chosen the topics, they should be written down and presented to all participants, making sure that they understand them. Then the participants should have some time to think and write down their comments. It is also recommended to give them some time to discuss the topics in smaller groups before they write down their comments.



## padlet

#### TOOLS

**Padlet** is a free online tool for organizing topics or documents and gathering public comments. It allows organizing columns that correspond to specific topics. Each column then holds the comments and reactions by choosing from preinstalled emojis. You may also use **Padlet** as an online notice board to communicate the important dates and deadlines of your online course.

#### TIPS

Opening a channel for finance and line ministries' officials to share their thinking and questions can be very beneficial for an effective collaboration process. Gathering questions and comments about the ERP Guidance in an organized way would benefit everyone involved in the process.

Make sure you react (click like, write thank you) to the comments and ideas of the participants. This will show them that their input is welcome and they are encouraged to provide more ideas, comments or questions.

## 6 COLLABORATIVE WORK

### Recommended tools: breakout rooms, Google Docs



#### WHAT IT IS

Collaborative group work provides comprehensive peer-to-peer knowledge sharing and knowledge retention. It can be part of an online session or an assignment that participants work on in their own time.

#### HOW IT WORKS

To prepare a good collaborative work session, you need to define a clear goal for the group and provide space where the participants can work together.

Make sure that all team members can connect and then give them guidelines for their assignment or discussion.

#### TOOLS

Use breakout rooms to divide participants into smaller work groups. [Zoom](#) or [Webex](#) allows to make groups randomly, predetermined, or even let participants freely choose the room. The groups should be small (4 to 6 participants) to encourage the participation of all members and make their communication efficient.

Give participants the option to collaborate on a document in real time. [Google Docs](#) or online Microsoft Word allow you to open a specific document for each group (especially suitable for assignments with longer texts).

#### TIPS

Collaborative work on documents has clear benefits for preparing good and concise ERP Structural Reform proposals by connecting the line ministries' officials, the ERP coordinators and supporting experts.

Ensure that all participants have a microphone and camera to participate in a breakout room.

Prepare breakout rooms and all the collaborative documents and name them – for example, Group 1, Group 2 – to avoid confusion. Prepare the sharing links for each document and ensure participants are granted permission to use the selected tool.



## 7 SEEKING SOLUTIONS

### Recommended tool: Miro



#### WHAT IT IS

Facilitating a more complex discussion or solution-seeking (problem-solving) session can bring substantial value to your learning event/meeting. Facilitating such a session requires a precisely outlined process, clearly defined goals and sufficient time (min. 2 hours).

#### HOW IT WORKS

You need a very clear goal or an exact definition of the problem. It can be predetermined or designed together with the participants (brainstorming).

A clear goal will ensure that all the discussions stay on track. Design a step-by-step process for leading the discussion: (1) describe the current situation and the desired state, (2) describe the challenges and problems, (3) find the causes for those problems, (4) propose solutions, (5) choose the best solutions, (6) prepare an action plan.

Indifferent steps introducing learning methods, like brainstorming, group discussions or comment gathering.

#### TOOLS

[Miro](#) is a feature-rich tool that allows to prepare specific boards for each step in the problem solving process. Participants can add their ideas on post-its, as texts or images. As the facilitator, you can freely rearrange all elements and make topical clusters. You can also conduct a voting to choose the best solutions. Miro allows you to keep track of all contributions and follow the process.

#### TIPS

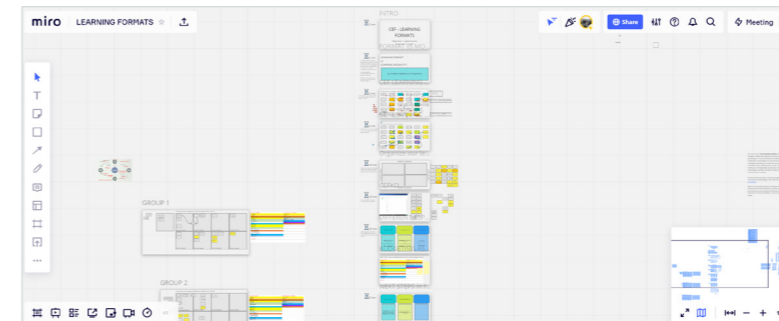
A good example for a described workflow would be connecting two or more line ministries to develop a structural reform covering their policy areas.

Present the full process to participants and allow them to propose changes to feel more like co-creators of the discussion.

Invite the participants to discuss the topics in each step in a smaller group.

Make sure that the goal is visible in all steps.

Allow enough time (at least 30 minutes) for showing participants how [Miro](#) works.







## MY NOTES

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Published and produced by: CEF

Production editors: Ana Frangež Kerševan, Tina Žagar, David Šturm

Text editor: Kadri Pödra

Photo: CEF Archive. The photos have been taken at CEF events.

Illustrations: Ana Frangež Kerševan

Design: Sonja Eržen

February 2022

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These guidelines were designed as part of the EU-funded project "Strengthening Line Ministries' Capacities to Assess Fiscal Implications of Structural Reforms" (FISR).

