Comparative Methodological Guidelines

Handbook for educators

Title: Comparative Methodological Guidelines – Handbook for educators

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INTRODUCTION

As the digital shift in education is here to stay, the need for different, improved, and transformative pedagogical approaches is growing.

This handbook serves as a theoretical framework with practical strategies and tools to help educators navigate online educational settings better and develop their soft skills in both face-to-face and online education. Even though the handbook is primarily focused on non-formal education, the theories and strategies can serve as an inspiration for various educational settings and contexts.

The handbook is for you if you are:

- ✓ **An educator making a shift from offline to online education.** Are you frustrated with the inability to make a clear transition? Read our helpful tips and find inspiration in our face-to-face and online education comparisons!

- ✓ **An educator – beginner in online education.** Does the abundance of information, apps, and approaches seem excessive? Our clear overview can help you pinpoint the direction in which you want to go and the skills you will need on the way!

- ✓ **A curious individual** who is interested in comparing practices and strategies in face-to-face, synchronous, and asynchronous education.

The handbook contains an introductory chapter and a glossary of terms, and covers 13 topics:

1. Developing a solution-focused (growth) mindset
2. Course design
3. Lesson planning
4. Educational accountability and assessment
5. Assigning and creating self-study materials
6. Recognizing and handling group dynamics
7. Motivating techniques
8. Managing your learners' attention and energy level: energizers, warmers coolers
9. Facilitating online discussions
10. Verbal and non-verbal online communication
11. Using embodied and kinesthetic learning activities
12. Time management
13. Giving and receiving feedback

What can you find in the chapters?

All chapters have a similar structure. Each chapter begins with a brief introduction and expected learning outcomes. Each chapter then **defines the key aspects, terminology, and issues** regarding the topic at hand. This is followed by insights into **the role of the educator** and specific and practical **tips and/or guidelines**. Where possible, it also suggests digital tools you can use.

An essential part of every chapter is the **comparison between educational practices and strategies in face-to-face, synchronous, and asynchronous online education.** There is a **discussion on one or more challenges** you can face in dealing with the subject. At the end of each chapter, there are **questions for reflection** and there is **a list of references and resources**. It is important to note that the handbook also presents a compilation of existing good practices to which the authors approach from their own perspective, so make sure you explore the extra resources as well to get a full idea of each topic you are interested in.

Most chapters are explicitly directed towards relevant soft skills: time management, giving and receiving feedback, different types of interpersonal communication and leadership (handling group dynamics, motivating learners, managing attention, facilitating discussions, verbal and non-verbal communication in the context of online learning), etc. Others are more focused on some of the key processes in teaching and learning (e.g., designing a course, a lesson, self-study materials…), but they also address important soft skills like flexibility, creative and critical thinking, problem solving, listening, reading body language, conflict resolution, and others.

How to use this handbook?

You can read the handbook from beginning to end, but you can also just read the chapters that interest you. **The chapters are self-contained**, so in some cases the same information is repeated in different chapters.

Chapters can be read relatively quickly – in fifteen to twenty minutes. We want you to be able to gather important information without tying you down with too much information. However, we encourage you to dig deeper and explore on your own, as the external materials are there to help you attain the foreseen learning outcomes.

GLOSSARY

Here is our selection of widely used terms linked with online education that can help you navigate this dynamic field!

Asynchronous Learning Asynchronous learning involves distance that goes beyond space and time. You are not in direct contact with your learners, and they are (usually) not in direct contact amongst themselves. The learning process develops through previously prepared materials, graded assignments, and peer-to-peer review. Socialising occurs through electronic means: email, forum discussions, comments, group tasks, etc.

Digital Competence A combination of skills and characteristics that enables efficient use of digital tools and managing digital environments.

Distance Learning/Education A type of learning process in which educators and learners do not occupy the same space or time. It is divided into asynchronous and synchronous learning.

eLearning (Electronic Learning) Learning that happens in digital environments through digital tools and devices.

Face-to-face Education A type of teaching and learning process in which educators and learners occupy the same physical space and time.

Gamification Gamification of a learning process is done by using and applying game elements: practice opportunities, onboarding activities, assessment, instant feedback, storytelling, using rewards, using micro-interactions, and personalization of learning outcomes.

Hybrid (Blended) Instruction/Learning A teaching and learning process in which distance and face-to-face learning are combined. A subtype that lets learners watch live-stream face-to-face learning is sometimes called hy-flex.

Learning Management Systems (LMS) Big platforms that offer the environment, tools, and means to organize, design, hold and evaluate your learning content or program. They can also provide various ways in which you can interact with your learners, grade their assignments, and track their progress. Some of the more popular and free LMS are Moodle, Thinkfic, and GoSkills.

Microlearning A learning method focused on learning in bite-sized portions of information. Although convenient and suitable for introducing and summarizing topics, it cannot be used to cover complex content and develop new skills. Some examples are flashcards, 2-minute videos, or short quizzes.

MOOC (Massive Open Online Course) Educational program or course that provides access to as many people as possible. Usually asynchronous, it is generally focused on academic and formal approaches (video lectures, graded assignments, assigned reading, etc.) but is slowly gaining popularity in non-formal education.

Learning objectives Learning objectives are short descriptions of the purpose of the educational program or course from the educators' perspective. They describe the purpose of educational activities and help foster expectations for your learners. For example: "*This course will help you learn the difference between methodological terms and set learning objectives and outcomes clearly, in an engaging way.".*

Learning outcomes Sentences and phrases that precisely describe the knowledge, attitude, beliefs, or skills the learners will develop in an educational programme or course. They have to be meaningful and relevant to the learners, measurable, and achievable. For example, *"The learners will be able to define learning outcomes for their lessons"*.

Synchronous learning The type of educational setting in which the educators and the learners find themselves in the same space and time – either face-to-face or via video conferencing platforms like Jitsi, Zoom, or Google Meet.

Chapter 1: Developing a solution-focused (growth) mindset

This chapter looks into the concept of the solution-focused (growth) mindset, the science behind it, and the importance of developing such a mindset for educators. After reading the chapter, you should be able to:

- ✓ Explain what a solution-focused mindset is and why it is important for you as an educator,
- ✓ Differentiate between a growth mindset and a fixed mindset,
- ✓ Test yourself and estimate how open-minded you are,
- ✓ Use different methods for developing your own and then your students' solution-focused mindset.

The chapter includes the following sections:

1. *The solution-focused (growth) mindset – definition and importance in education*
2. *The growth mindset and the educator*
3. *Practical advice and tips – How to support your learners*
4. *Growth mindset in face-to-face, synchronous, and asynchronous education*
5. *Common challenges and misconceptions about the growth mindset*
6. *Questions for reflection*
7. *References and resources*

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1. The solution-focused (growth) mindset – definition and importance in education

> *The way you choose to engage with and think about problems, directly influences your ability to solve them effectively.*

Before we start defining the concept, we should mention that solution-focused and growth mindsets are very often used as interchangeable concepts, so don't be confused with this different terminology. The concept of a growth mindset – the belief that intelligence can be developed through effort – is gaining considerable attention in the education world, and for a good reason. A learner's perspective or "mindset" can have a huge impact on their academic success, motivation, and future. Educators, as primary mentors, can play a big role in nurturing that mindset.

The difference between a growth mindset and a fixed mindset

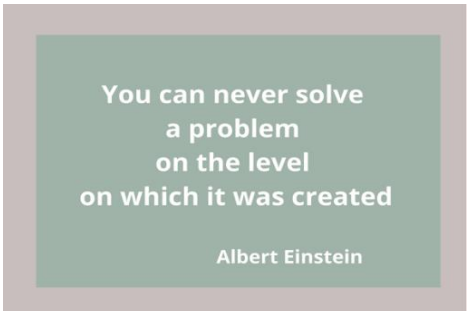
The theory of fixed and growth mindsets comes from Dr Carol Dweck, a professor of psychology at Stanford University.

- **Fixed Mindset** – Learners with a fixed mindset believe that any skills, talents, and abilities they have, are fixed traits. People with a fixed mindset believe that any challenges they face are due to their lack of natural skills and abilities. Another common belief is that they "aren't good enough". As a result, they are resistant to try any new assignment that seems too hard and unfamiliar. In the classroom setting, believing you are "good at maths" or "bad at maths" is an example of a fixed mindset.
- **Growth Mindset** – Learners with a growth mindset believe that they can develop any competence if they invest enough time, effort, and patience. They generally have healthy self-esteem and confidence and that's why they believe that they can accomplish anything they put their mind to if they don't give up after mistakes. They see mistakes as natural and expected as a normal part of growth and development. Consequently, they are usually open to feedback and see it as a way for improvements.

(Source: Army Resilience website)

The Importance of a solution-focused mindset in education

The biggest change we see in the global education system lately is the massive transformation from face-to-face to digital learning. We are witnessing a paradigm shift. To be able to adjust to the rapid changes, rethink and reinvent the educational landscape, we have to be open-minded.
One of the main goals of education is to develop competencies that are necessary for a given society and equip learners for solving different problems. We live in a complex world and sometimes problems we encounter seem so complex that finding solutions could be daunting. One way to overcome this is to focus on the solution rather than the problem. This approach aims to achieve small steps forward. It is purposeful and strives to improve a situation as quickly as is reasonable. It doesn't mean that all problems can be solved quickly, but there is always a way out if we look for solutions.
It is vital that we, as educators, welcome and develop a solution-focused mindset. It will help us to explore and amplify strengths and successes instead of concentrating and being stuck on problems. Using this approach emphasises choice and encourages people to take responsibility for their own behaviour and actions. The technique is universal and can be used both with adults and children. Using solution-focused ways of working promotes feelings of confidence and can encourage a positive ethos throughout a learning environment.



The science behind the concept

If you're skeptical about the growth mindset, it may be helpful to look into neuroscience that supports this idea. The concept of neuroplasticity shows that the neural pathways in our brain are constantly changing in response to our experiences. The brain is like a muscle – the more you practice, the stronger it becomes, and the process becomes more automatic.

What is Neuroplasticity?

Neuroplasticity is the brain's ability to change and grow and this process happens throughout all our life. For a long time, scientists believed that this was only possible in early childhood. They believed that with ageing, the brain becomes rigid and fixed. Recently, a large body of research has shown that the brain continues to change even in old age.

The brain is a “pattern-seeking device”. If your brain neurons are activated in the same pattern over and over, it will be easier for the brain to “remember” and follow the same pattern over and over.
As you see, the brain has the ability to remember the task that you worked on, and in future, it becomes much easier every time you do the same task.
In conclusion, we can say that our brain is very plastic. Through various challenges and constant practice, we can build pathways that make our brains stronger.

2. The growth mindset and the educator

To be able to develop a growth mindset in our learners, we would suggest first, developing it yourself as an educator. We hope you agree with the saying “You should walk your talk”. As educators, we should be the role models, and show the competencies we are trying to develop in our learners.

The first step in this direction might be finding an answer to the question: **Do I have a Growth-mindset?**

➡ Take this test to find the answer.

Now let’s see **HOW** can you develop your growth mindset. Try these practical steps and reflection questions.

Practices for developing a Growth mindset[1]

1. Think about a time during the past week when you were faced with an academic, social, or personal challenge. Reflect on your experience - did you approach the challenge with a growth mindset or a fixed mindset?

   How do you know? If you faced the challenge with a fixed mindset, how might you have approached it differently?

2. Reflect on real-life examples of the use of a growth mindset (by you or someone you know). Very beneficial, if you use some journaling or free writing to think through your experience. Try to describe how the growth mindset helped you (or someone you know) to solve a problem or achieve a goal.

   Be as specific as possible. What did you think and/or do that allowed you to overcome the challenge?

[1] Taken and adapted from “Growth mindset – discussion questions”, ESU webpage

After several times of written reflections, look into it. Do you see any patterns? Do you see similarities in actions, thoughts, or emotions?

Try to be specific. Identify thinking and behavioural patterns that clearly demonstrate a growth mindset. Remember these when you face a new challenge.

3. Think about something about yourself that you always wanted to change. What is it? What prevented you from acting on it? Was it a fixed mindset?

   Reflect on it from a growth mindset. Create a concrete plan for that particular change.

4. When you're feeling frozen, or stuck, when you cannot see the light at the end of the tunnel, remember *the power of "YET"*! Words have power. When we say "I can't do" it triggers a belief that we never can overcome this challenge, it's beyond our reach. That makes us give up without even trying hard enough. When we say "I can't do ... yet" brings the thought that maybe right now I cannot do something, but if I put time and effort, and find a better strategy, things will change.

5. Remember to:
   - Concentrate on effort, overcoming obstacles and determination despite setbacks
   - Pick tasks that are not easy
   - Focus on strategies
   - Reflect on different strategies that work and don't work
   - Focus on learning and improving
   - Seek challenges
   - Work hard

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3. Practical advice and tips – How to support your learners

Helping learners develop a growth mindset requires deliberate effort from educators, but many of the methods can be easily integrated in already existing practices. The following strategies and tips can help you to foster a growth mindset in the learning environment:

1. **Challenges and struggles**. The first step would be to accept challenges and normalise struggle. For this, you should help your learners to see that struggle is part of the learning process. When we help learners to accept and welcome struggle as a part of the learning process, they will react much more positively when they feel challenged.

2. **Engagement with challenges.** Introduce challenges as fun and exciting parts of the learning process and emphasise that easy tasks can be boring. Part of developing a growth mindset is teaching learners how to overcome obstacles. A particularly hard problem or complex assignment that stretches their abilities can provide opportunities for growth and further instruction that emphasises problem-solving.
   You could use these 8 challenge-based learning apps, tools and resources.

3. **The power of the word "yet"**. If someone makes the statement "I'm not a maths person" or "I cannot do this," adding a simple qualifier will signal that there is a space for gaining ability. "You're not a maths person *yet*", "You cannot do this *yet."*

4. **Brain and hard tasks.** Explain the value of hard tasks to the brain. Promote the idea that brains are soft "muscles" that can be developed. Brain research shows that due to plasticity, our brain neurons can grow and when a person believes in change, more effort is put into learning and development. Try this 10 best brain training apps.

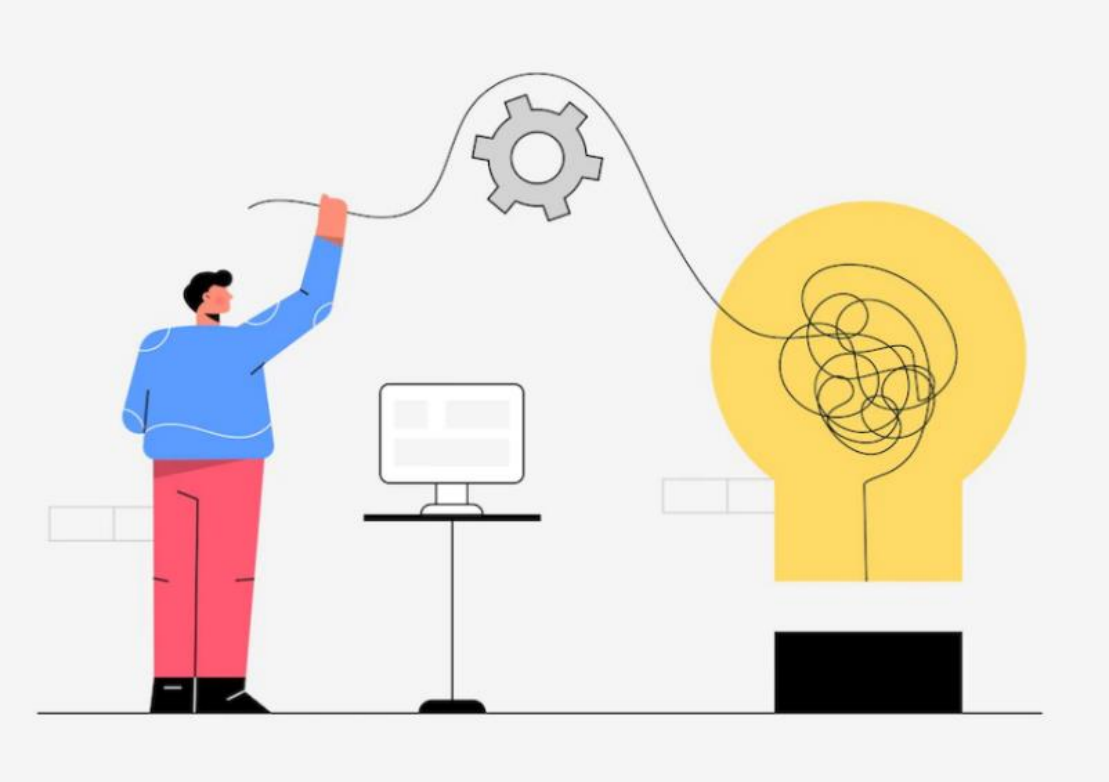
5. **Value of Mistakes.** Explain that without mistakes learning is not possible. Help learners see mistakes as learning opportunities. Educators can model this outlook in reactions to their own mistakes and the steps they take to correct a mistake. Be a role model to your students – accept the value of your mistakes.

6. **Setting goals.** Having learners set step-by-step, achievable goals shows them that growth and progress is possible. Check out these goal tracking apps.

7. **Exercises and activities for cooperation.** When we work together for problem-solving, we learn how to cooperate, how to ask for help, and how to find solutions using joint effort. It also reduces the importance of separate, individual results, and helps some individuals to feel more secure and comfortable. Use online team building and team bonding games and activities. Here you can find different games and activities for online teambuilding.

8. **Danger of praising intelligence**. This may sound strange but when we praise for "being smart" it reinforces the idea of intelligence as a fixed characteristic. For the students, who are praised for smartness, it can become a demotivating factor. They can "stop trying" because they already "know everything". For those who do not receive the praise, it can also become a demotivator – they start comparing themselves with "smarter" ones and lose motivation.

9. **Don't oversimplify.** It sounds like harmless encouragement and empowerment when we use the phrase "You can do anything!", but if we give this encouragement to the learners who didn't overcome any challenges, the phrase will be just empty words and you might lose credibility.



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4. Growth mindset in face-to-face, synchronous, and asynchronous education

Face-to-face education	Synchronous education	Asynchronous education
In face-to-face education you have more tools, techniques, opportunities, and possibilities to support learners, question their existing mindset and encourage and foster development of growth mindset. Because face-to-face learning ensures a real-time interaction it's the best option for those learners, who learn better through group work and cooperation. Use interactive activities to challenge them and at the same time provide immediate feedback. A face-to-face setting makes it easier to use experiential learning/learning by doing. You could create a simulation using a real-life scenario to make the learners question their existing points of view and see alternative options. One more characteristic of a face-to-face setting is that because of the close social proximity, it is much easier to create a trusting, intimate environment, which is beneficial when educators question deeply ingrained beliefs and assumptions. There is a connection between a growth mindset and self-confidence. You could use different activities and methods for building your learners' self-esteem and confidence.	There is no big difference in how we support the development of a growth mindset between face-to-face and synchronous online teaching. Here too you can have real-time interpersonal communication, the use of natural language and immediate feedback. In online synchronous education, you can use the same tips as in a face-to-face setting, just with the use of technology, for example, group work and video discussions to challenge the fixed mindset and allow learners to share their experiences. Provide learners with tools for online collaboration (Dropbox, Google Docs). You can invite them to brainstorm their views on given topics to find an alternative (Padlet, Mindmeister). Invite learners to prepare and share their formal or informal presentations. They can record and then share the link of their presentation using media such as Flipgrid, Screencast-o-matic, VoiceThread. One great tool for energizing your learners, helping them to be present and re-engage you could use is the TRENDSS Trainer's Toolkit for various creative ideas!	The differences between synchronous and asynchronous settings lie in the choice of methods used for achieving their educational objectives. There are five major differences between asynchronous and synchronous education - communication tools, input methods, modes of collaboration, feedback types and targeted skills. Because an asynchronous environment is more content-oriented, use videos (Moovly), podcasts (Audacity, Podbean), and provide scripts for those who prefer to read. For finding resources and creating materials you could use MERLOT, WikiMedia. You can use interactive presentation tools Nearpod, ClassFlow to add self-check questions to lecture materials and videos. A great way to challenge your learners, engage them, and spark emotions is to create audio flashcards, jeopardy, word puzzles and quizzes using these tools (Quizlet, Jeopardy Labs, StudyStack).

5. Common challenges and misconceptions about the growth mindset

Here are some of the most common misconceptions about growth mindset to look out for (Taken/Adapted from Washington State Board for Community and Technical Colleges):

- **The belief that you already have a growth mindset.**
  No one has a growth mindset all the time, it must be developed through practice. Most of us have a growth mindset in some situations (e.g., our career) and a fixed mindset in others (e.g., our relationships). In some situations, a fixed mindset is needed. However, be careful because your fixed mindset might try to assure you that you already have a growth mindset. If you believe in this false statement, it can lead you to a false growth mindset, which can move our attention from the things we do and the choices we make. Read more about the false growth mindset on Edutopia.
  Developing a growth mindset is a challenge that can be overcome only through a conscious approach. To do so, we should agree that all of us have some fixed habits, and fixed traits and our fixed mindsets can show in different areas.

- **The belief that if you have a growth mindset it will naturally lead to a growth mindset in your learners**.
  Unfortunately, it's not that simple! We all know that it is not easy to break our habits, especially mental habits. Not easy when we try to change our own habits, and it's even harder when we try to help someone else to break out of their mental habits. It's one thing to have a growth mindset for yourself, but to help others to develop a growth mindset requires special skills.
  One obstacle on the way to the growth mindset is that we all are prone to the Fundamental Attribution Error – usually, we are much more tolerant of our own mistakes. We see them as exceptions from the rule, something not natural for us, but others' mistakes we judge harshly, we see it as proof of their character. As the saying goes, "We judge others by their actions and ourselves by our intentions."

  Growth mindset development won't happen automatically by itself, but there are different steps we can take to support learners practising a growth mindset. To be able to pass on a growth mindset, we should have the same mindset about others as we do about ourselves. Most important here is to show your learners that you believe in them, in their ability to grow.

- **The belief that success in school means that the student has a growth mindset.**
  Very often students, who push themselves for academic success and are overachievers, are perfectionists and might have a fixed mindset. Experience shows that these students may have very unhealthy attitudes about the learning process and educational environment. They prefer to avoid challenges not to feel incompetent.

- **The belief that according to the growth mindset theory we shouldn't praise our students.**
  As we already know, the best way to praise is to praise our learners' actions, not them as learners in general. In this case praise will be associated with actions instead of the learner's identity, as identity can be rigid. Read more about praise from the Florida Department of Education's Growth Mindset module.

  Watch this video about the impact of praise.

Praise the process, not the person!

6. Questions for reflection and practical exercises

This adaptation of Carol Dweck's "Mindset" gives an extensive list of ideas on how to reflect about our mindset (Taken/adapted from "Growth mindset – discussion questions"):

1. Would you say you are a smart person? When, in what conditions do you feel smart? When you're doing something without any mistakes or when you're learning something new?
   Grow Your Mindset: How can you change something that's difficult into something that makes you feel smart?

2. Think back and remember the opportunity that you had, something important for you but you lost it, because of your fixed mindset. What holds you back? Your thoughts and worries about your skills, abilities? Fear of failure? Fear of judgements?
   Grow Your Mindset: Now try to look into that opportunity or challenge through growth mindset eyes. Think of it as a great chance to learn something new.

3. Think of times other people outdid you and you just assumed they were smarter or more talented.
   Grow Your Mindset: Now consider the idea that they just used better strategies, taught themselves more, practised harder, and worked their way through obstacles. You can do that too, if you want to.

4. Are there situations in which you disengage your intelligence?
   Grow Your Mindset: Next time you're in one of those situations, get yourself into a growth mindset – think about learning and improvement, not judgement – and hook it back up.

5. Is there something in your past that you think measured you? A test score? A dishonest or callous action? Being fired from a job? Being rejected. Focus on that thing.
   Grow Your Mindset: Now put it in a growth-mindset perspective. Look honestly at your role in it, but understand that it doesn't define your intelligence or your personality or anything else about you. Instead, as: What did I (or can I) learn from that experience? How can I use it as a basis for growth? Carry that with you.

6. How do you respond to Feedback?
   Grow Your Mindset: Remember that feedback helps you (and others) understand how to fix something. It's not feedback that labels something deficient. Use constructive feedback to improve, even if you believe you've already done your best work.

7. Are you a person who tends to avoid responsibility for your problems or failures by making excuses or blaming others?
   Grow Your Mindset: Think of specific examples and discuss how you could use a growth mindset to take responsibility and start to correct the problems you face.

8. Do you use feeling bad as a reason for doing nothing? When you feel disappointed, thwarted, cheated, or depressed do you use this as a reason to stop trying?
   Grow Your Mindset: What steps could you take to help growth mindset thinking overcome your fixed mindset? Discuss a specific plan.

7. References and resources

Bradley Busch (2018) Research every teacher should know: growth mindset. The Guardian.

Carol S. Dweck (2007) Mindset: The New Psychology of Success. Ballantine Books; Updated edition

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King, R. (2012). How You Think about Your Intelligence Influences How Adjusted You Are: Implicit Theories and Adjustment. *Personal. Individual Differences* 53 (5), 705–709. doi:10.1016/j.paid.2012.05.031

Webpages

- Growth Mindset Toolkit - Transforming education
- Solution Focused Problem Solving
- A summary of Growth and Fixed Mindsets
- MindsetWorks
- Teaching growth mindset to your students
- The power of self-questioning
- Effective ways to develop a growth mindset in students
- Growth mindset for educator teams (materials, downloads)
- Developing growth mindset amongst teachers
- Why developing a growth mindset is important and how to implement it in the classroom
- How to foster a growth mindset in the classroom
- Practical tips for developing a growth mindset
- Neuroplasticity
- How do I actually develop a growth mindset?
- Challenge-based learning apps and tools
- 10 Best Brain Training Apps
- Goal Tracking apps
- Mindset Kit – a free set of useful online lessons and practices
- Common growth mindset misconceptions

Chapter 2: Course design

This chapter gives an overview of the key processes in designing a course and compares their application in face-to-face and online learning settings. Upon studying the content of this chapter, you should be able to:

- ✓ describe the key steps in designing a course,
- ✓ compare the application of different planning strategies in face-to-face and online courses.

The chapter includes the following sections:

1. *The basics of course design: the key elements of the planning cycle*
2. *Baseline and needs assessment*
3. *Learning objectives and outcomes*
4. *Content, pedagogical methods and activities*
5. *Differentiation in learning*
6. *Resources: time, space, instructional materials*
7. *Monitoring progression, assessment, and evaluation*
8. *Questions for reflection*
9. *References and resources*

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1. The basics of course design: the key elements of the planning cycle

Designing a course is often compared to planning a journey, one that you will take with your learners. This means that you as an educator need to set out a roadmap and plan according to the key elements of each journey:

1. Map the resources you have at the starting point (your learners' existing knowledge and experience, their expectations, their needs…),
2. Define the final destination (the knowledge, skills or attitudes your learners will gain during and after the journey),
3. Decide on the mode of travel (the methods you will use, the activities your learners will be doing, the rhythm and the pace of the process…),
4. Structure the "check-in" points (monitoring mechanisms, assessment, and evaluation).

There are plenty of examples of key steps in planning educational processes, but we opted for a list that works in both formal and non-formal education. The key elements of planning and designing a course (as well as lesson planning) are grouped in the list below and discussed in more detail in the following sections.

1. Baseline and needs assessment
2. Learning objectives and outcomes
3. Content, pedagogical methods and activities
4. Differentiation in learning
5. Resources: time, space, instructional materials
6. Monitoring progression, assessment, and evaluation

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2. Baseline and needs assessment

Knowing your learners' needs and capacities is a prerequisite of any planning. You need to know "the starting point of the journey" so you can position your course or programme accordingly. To compile a pool of information on your learners that you will use in designing a course or planning a lesson, as well as in monitoring and evaluation, you can try two different, but complementary approaches: needs assessment and baseline assessment.

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A needs assessment is conducted to understand the distance between the current condition and the desired one. It is a "*systematic approach to studying the state of knowledge, ability, interest, or attitude of a defined audience or group involving a particular subject*"[2]. Often the first part of any planning process, needs assessment gives a rationale for your education programme and helps you to identify the solutions to your learners' challenges. In other words, it gives you a clear direction in setting goals and desired results of your education or training programme. The most common methods for conducting a needs assessment are surveys, interviews, focus groups, working groups, SWOT analyses, etc. Apart from a direct approach (including the target group directly, as is the case with the mentioned methods), needs assessment can be indirect (research review, working groups with other stakeholders to gather data on your learners' needs, etc.).

Baseline assessment refers to the primary data you gather on your learners' prior knowledge and experience (e.g., how much they know about sustainable development, or how much experience they have with non-formal education). The data can serve both as a starting point and as a reference point later in the process (you can compare your learners' performance at different points in time). Baseline assessment can give you a deeper insight into your learners' potential, and a framework for planning differentiation in learning. It can also help you define your own expectations from the very beginning. It can be done through questionnaires, tests, quizzes, specific tasks, informal observing, etc. The choice of how deep you will dive in depends on your needs, your learners' needs, and the context in which the learning is taking place.

[2] McCawley (2009:3), *Methods for Conducting an Educational Needs Assessment*

Application in different settings:

Face-to-face	Synchronous	Asynchronous
Needs assessment can be done through indirect and direct approaches. The most common example of an indirect approach is **exploring relevant research.** It is peer-reviewed, relevant, and contributes to your credibility. However, make sure you check the sources, read the methodology, and compare the experimental sample with your learners to see if it has to be changed. A common example of a direct approach you can use is handing out **questionnaires** to your learners. You can use open or closed questions, depending on the information you want to get. Surveys are a fast and easy way but can be a hassle to analyse and usually don't offer profound insights. Talking to your students can be done individually through **(semi)structured interviews** or **focus groups**. They provide more information and have other advantages like stronger group cohesion or relationships. On the other hand, these methods are time-consuming, open to bias, and can't be generalized outside your group by any certainty.	While the methods are similar to face-to-face education, the delivery is quite different. If posting surveys, it is essential to include a short description of its aims and importance and ensure the anonymity of the learners. Use online programs or tools to help you with analysis –GoogleForms and similar programs to summarise the data and prepare a report (use as many visuals as you can). The initial learning curve is worth the effort. When organizing online focus groups or interviews, have a password-protected meeting. Choose a background that inspires confidence and doesn't detract attention from the questions you are asking – a neutral bookshelf or blurred background works well. Check your internet connection, invest in a good microphone, and ask for consent to record the meeting for a more detailed analysis. Plan for solutions for technical or other difficulties your target group might experience or for modifications if some conditions cannot be met (e.g., cameras on).	In fully asynchronous education, be aware that it will be more challenging to do a direct needs assessment with the learners who will take part in your course. Base your initial plans on recent research findings, search trends, and top search terms. If possible, organise initial meetings through a video conferencing tool or dedicate the first part of your course to online surveys. This will give you enough time to modify your plans according to your learners' specific needs. At the beginning of the course, include activities in which you will encourage your learners to share their motivation, expectations, and fears. This can be done through short questionnaires, posts, forum discussions, but also creative methods like posting videos or making infographics. At the end of the course, ask them to give feedback on the course content, what was missing and what would be beneficial to include in the course. You can use this data as indirect information on your learners' needs for future courses.
Baseline assessment can be done through similar methods as needs assessment, but with a different purpose (to get information on what your learners know or have experienced already related to the content of your course). A direct approach works best, but you can gather data by including other stakeholders, previous tests, or informal observations. The direct approach is easier in face-to-face settings, where you can offer timely support and explanations about baseline assessment and observe different types of behaviours while they're doing the tasks.	Like in face-to-face settings, in online synchronous education, you can observe your learners directly and offer timely support. However, this can be more challenging in situations in which your learners are experiencing technical issues (e.g., cannot have their cameras on) or in individual or group work in breakout rooms. In cases when you are using questionnaires, quizzes, or similar tools, make sure you communicate the goal of the baseline assessment and the instructions clearly so that the learners understand that they are not merely taking a knowledge test.	In online asynchronous settings, some of the methods of the direct approach are even more challenging (observation, immediate support). Regardless of the type of task you want to apply, make sure you explain the instructions and the purpose of the assessment clearly and post it somewhere easily accessible. You can set up tasks that will allow you to observe your learners' knowledge, reactions, attitudes, or other things you are interested in on your platform(s) in written format.

3. Objectives and learning outcomes

Often used interchangeably, learning objectives and learning outcomes are focused on the "destination" of the journey and define what your learners will gain from engaging in a learning process. In this handbook, we will use the following definitions of **goals, objectives, and outcomes**:

1. Learning goals define the final vision of the change that the educational process, or your course, should bring upon the learners and the community (e.g., *To develop entrepreneurial skills of young people from rural areas*). They reflect what you as an educator want to achieve, but also what other stakeholders expect (e.g., any financial mechanisms providing your course resources, the government, project donors, etc.). The goals present the highest category in the hierarchy and serve as a framework for defining learning objectives and outcomes.

2. Learning objectives are more focused on the educator and can be defined in relation to the content and methods the educator is going to use or in relation to the educator's expectations (e.g., *To improve the participants' planning skills in organising entrepreneurial activities*). They are broader than learning outcomes and set the framework for the educator's aims or expectations. On the course design level, they should be defined for the course as a whole, and for each module or lesson separately.

3. Learning outcomes are concise tools to measure the learners' performance and attainment and to define the direction of the learning process. They should be meaningful and relevant to the learners, measurable, and achievable. On the course design level, you set the main outcomes (e.g., *The participants will be able to create a project proposal based on specific criteria*), but they should also be set for each lower level (modules and lessons) separately. One way to align them is to look for what needs to be achieved on the lower level to reach the higher level of results.

Setting clear and measurable learning outcomes should help monitor the learning process and align expectations (your expectations with your learners' expectations). One of the most well-known tools for setting outcomes is **Bloom's taxonomy – a taxonomy for learning, teaching, and assessing**. Developed in 1956, it served as a framework for categorizing educational objectives (what educators later started calling learning outcomes) – descriptions of what the learners will be able to do after being involved in planned educational activities. The framework now entails different domains in which learning takes place: cognitive (knowledge, intellectual processes), affective (attitudes, beliefs, values), and psychomotor (kinesthetic, physical skills).

In 2008, Anthony Churches proposed an addition to the list of verbs, stating that a lot of outcomes are related specifically to the online learning environment. Some of his examples include[3]:

[3] Churches (2008), *Bloom's Digital Taxonomy*

LEVEL	VERBS
Remembering	bullet pointing, highlighting, bookmarking, social networking, "googling"…
Understanding	advanced and Boolean searching, blog journaling, commenting, annotating…
Applying	running and operating (a program, an app), playing (educational games), uploading and sharing, editing…
Analysing	mashing (mashups), linking, reverse-engineering, cracking, mind-mapping
Evaluating	blog/vlog commenting and reflecting, posting, moderating, collaborating and networking (e.g., online forums), testing, validating (the veracity of sources)…
Creating	programming, filming, animating, videocasting, podcasting, mixing and remixing, directing and producing, publishing (e.g., vlogging, wiki-ing)

Churches also introduces *Collaboration* as a horizontal element, as an important mechanism that facilitates higher-order thinking skills. It consists of activities such as moderating, commenting, video conferencing, reviewing, chatting, emailing, etc.

Some of the limitations of the Taxonomy and learning outcomes in general include:

- Unintended outcomes: Learning sometimes happens unexpectedly. Expressive outcomes are the results of activities that have no intended outcomes, but the person is "uniquely changed in some way from exposure to the experience"[4].
- Assessment: Some outcomes are less easy to recognise and pinpoint and are therefore less often assessed and acknowledged. These include expressive outcomes and outcomes directed towards attitudes, values, and behaviours.
- Stages of development: Some experts argue that learning doesn't necessarily happen from lower to higher levels (e.g., we can make lemonade without knowing anything about acidic compounds in lemons).

These issues are addressed in the comparative table below, but what is important to emphasise here is that a certain level of **flexibility and creativity** must be attained in setting learning outcomes, especially in non-formal education.
Research on outcome attainment in face-to-face and online courses shows different results: some show that there are no differences, and some show that online education is less efficient in this area. Either way, research indicates that there are certain factors that influence the effectiveness of online education in terms of outcome attainment: the learners' interaction with other learners, their ability to interact with instructors after the class, the quality of online platforms, and the challenges they face in their environment[5]. Research on blended learning shows that Bloom's taxonomy is useful since it contributes to making the course more systematic and efficient and helps to create clear structure and vision[6]. For alternatives, check out the Marzano's New Taxonomy or the Structure of Observed Learning Outcomes – the SOLO model[7].

[4] Anderson & Krathwohl (2001:21), *A taxonomy for learning, teaching, and assessing: a revision.*
[5] Janmaimool & Nunsunanon (2021), *Online vs. Face-to-Face Lecture Courses*
[6] Pikhart & Klimova (2019), *Utilization of Linguistic Aspects of Bloom's Taxonomy in Blended Learning*
[7] Rahman & Manaf (2017), *A Critical Analysis of Bloom's Taxonomy.*

Application in different settings:

Face-to-face	Synchronous	Asynchronous
Learning objectives and outcomes set up and communicate the direction of the course. You should set objectives and outcomes on the course level first. While preparing your course, map the major topics that will be covered, and set learning outcomes for each topic separately before breaking them down to (sub)outcomes for each lesson. Experts advise writing one to three learning outcomes per major topic, and one to three outcomes per lesson. Each outcome should be comprised of one action verb! The outcomes set on the course level have to entail higher-order levels of learning (in any domain of learning – e.g., cognitive, affective, psychomotor), and can then be broken down into lower-level categories. Make sure you communicate the outcomes with your learners at the beginning of the course and share your expectations. The outcomes can be shared on the promotional materials, set on the background wall of your working space, and be a reminder of shared motivation. Set up monitoring and assessment mechanisms throughout your course at a regular pace. Include various tools and methods and encourage self-reflection to ensure your learners will share the changes in their attitudes and behaviours, and recognise unintended learning.	In online education, it usually takes more time to reach the objectives and outcomes set for face-to-face education. This is because online synchronous lessons should be shorter, include more breaks and be combined with more self-directed learning (which means more individual or group work outside your lessons or sessions). You can modify the outcomes accordingly: you might need to include more outcomes of the lower-order cognitive categories or set a lower number of outcomes. If you estimate that your course can encompass the same content as in a face-to-face setting, follow the same guidelines: choose up to three outcomes per major topic, and choose only one action verb per outcome! Present the learning outcomes at the beginning of your course and include them in the self-study materials (if applicable). Make sure they are visible, clear and accessible to your learners in the general information about the course. Plan for regular monitoring and assessment to check for the attainment of the outcomes. Use the same methods as in face-to-face courses to keep track of unexpected learning, or less observable categories (attitudes, values, etc.), but don't forget to use digital tools to make it interactive.	When it comes to the number of outcomes and their position on the complexity scale, you can rely on the same guidelines as in synchronous online education: never choose more than three outcomes per major topic and break them down into lower-order categories your learners can follow. Always include one action verb per outcome. The presentation of the learning outcomes is crucial in asynchronous courses. Since the learners have greater autonomy in organising their time and effort, and you often cannot provide them with immediate support, they need to understand the purpose of every material and task from the beginning and have a clear vision of where it will lead them in terms of new knowledge, skills, etc. Furthermore, the way you present the outcomes might even be a key factor in your learners' decision on whether to enrol in your course or not. Make the presentation of the learning outcomes user-friendly and accessible at all times. Use concise language and make it short and impactful, but try to create additional explanations and examples (e.g., through video, visuals, or texts). In planning monitoring and assessment, you can use the same strategies as in other educational settings, but with the appropriate modifications and use of digital tools.

4. Content, pedagogical methods and activities

The content of your course must derive from the objectives and outcomes you have set. The content and the topics can be organised using different strategies:

- main concepts/categories (no hierarchy, no sequence: e.g., *apps for creating audio material, video material, visuals, interactive presentations*),
- subordinate to a higher level (hierarchical, when the person needs to learn lower-level concepts as a prerequisite for more advanced ones, e.g., *learning a vocabulary set in a foreign language, then forming sentences*),
- chronologically (when time patterns are necessary, e.g., *processes, recipes*),
- cause and effect (problems and solutions, e.g., discussing policies),
- and others.

Chunking – breaking the content down into smaller units, is a very important mechanism in designing courses and lessons, especially in online education. While planning smaller units, make sure you define which information is essential, but include additional materials for the learners who want to "dig deeper". Plan a series of lessons or modules that will cover major topics, and do not include more than two key concepts per lesson. Encourage reflection and self-reflection before moving on to other topics. You can find a useful checklist for chunking course material here. The key task here is to organise a coherent structure and communicate that to your learners. Seeing the logical structure of the content will contribute to their understanding of the flow of the course as a whole and make it easier for them to follow the content, prepare for the lessons, and engage.

Application in different settings (content):

Face-to-face	Synchronous	Asynchronous
The content should stem from the learning objectives and outcomes, but its delivery should be planned according to its inherent features, the needs and interests of your learners, and the resources you have at your disposal (time, space, money, etc.). Organise the content for the optimal consolidation of knowledge: it should allow for a transfer of learning, but not be confused with previous topics or topics you have lined up next. If you have time, research or test different strategies before putting them into practice.	Time is a resource especially delicate to handle here because lesson delivery has its limitations (shorter lessons, more breaks, etc.). To keep your synchronous lessons efficient, the strategies for delivering content should also rely on the learners' individual work (self-directed learning). Make sure you cover only one or two key concepts per lesson and explore how you can teach them more efficiently in e-learning (e.g., here). If you cover an issue that can impact people, evoke strong emotions, or affect their mood, include more activities that will help people process them.	The most important thing in asynchronous education is to deliver content in a way that will allow for the consolidation of knowledge, feel intuitive, and not be overwhelming. You should create a clear pathway through the course content that your learners can easily follow and access. Choose your content delivery tools according to your chosen strategy. To test if the content is adequately presented, you can do a test run, organize a focus group, or hire an external evaluator. You can also include surveys that will allow your learners to rate the usefulness of the topics and their order and flow.

The choice of **instructional strategies, or methods, and activities**, stems from the intersection between the course objectives and learning outcomes, the content, and the educator's knowledge and understanding of the characteristics, needs and expectations of their learners. Again, on the course design level, you don't have to be too specific about every method you will use for each lesson, but you should have a clear vision of how certain content would be best conveyed or which experiences you want your learners to go through to attain the learning outcomes. This means you need to decide on the types of learning you want to stimulate in advance: active learning, observational learning, rote learning, meaningful learning, cooperative learning, e-learning, etc. Depending on your focus, there is an abundance of methods available to educators today that can fit their vision for the course. Some of them are also discussed in this handbook, along with different strategies and techniques related to their application in the online setting.

Application in different settings (methods):

Face-to-face	**Synchronous**	**Asynchronous**
In a face-to-face environment, it is easier to determine, deliver, and adjust methods that were originally created for such settings. You should choose methods that reflect the path you want your learners to take to reach the learning outcomes and their own personal objectives, needs and interests. While choosing the methods, make sure you align them with the time, space and learning materials you have at your disposal. The biggest asset of face-to-face education is the possibility to create settings for meaningful in-person interaction that can enhance the learning experience. Here you can be more flexible and engage your learners in different experiential and collaborative learning activities. You can include creative methods and methods that can efficiently engage all senses. You can enhance them with real-life objects and interaction with the environment. Make sure you model and cultivate reflection and self-reflection throughout the course (e.g., oral reflection, journals, freewriting, think-pair-share, storyboards, concept maps…).	Thinking about methods for synchronous education will inadvertently lead to methods that use text, sound, and camera. Be aware that some learners won't be able to use the camera and think about possible variations. Try thinking about methods that will occasionally engage the body to keep the energy levels up and remedy long sitting hours. Plan for activities that will get you and your learners away from the camera. Have them use everyday objects in their surroundings. When sharing your screen, be aware that the materials you use have to do a lot of the work because your learners won't be able to see you in full, so make sure you plan the methods and the materials in parallel. Do not use too many different methods and activities in a short period, as your learners might be overwhelmed. You might be tempted to transfer activities from the face-to-face setting to online. Some might work with or without modifications, but a lot of them will need a careful examination before being put into practice. Make sure you test them and look into possible challenges.	The methods used in asynchronous education are substantially different from other educational settings. Asynchronous education heavily relies on study materials, visuals, videos, and automatized content (for example, quizzes). It is essential to let your learners know how much time per week they need to dedicate to the course at the beginning, and for each module separately. The materials are the main channel through which you communicate the methods and activities, so make sure you give clear instructions and include interactive and collaborative tools. Apart from the content delivery tools you will use in your course, explore other areas you will need: communication tools and collaborative tools and platforms, individual or group assignment tools, meaningful assessment tools, and feedback tools. Include a "Frequently Asked Questions" section on your platform. You can also set up office hours when your learners can reach you if they have any questions (in person or via email).

5. Differentiation in learning

One size does not fit all! Your learners differ in various ways: their personal traits, motivation, abilities, gender, cultural backgrounds, socio-economic status… In addition, every one of them experiences the same educational process differently so their level of motivation and engagement can vary during the process. Needs assessments and baseline assessments serve as a basis for offering different paths – different aspects of the educational process which need to be adapted to fit the specific needs of the learners and to optimize their learning experience. The table below shows examples of areas in which differentiation can take place and their features.

Aspects we can adapt	Description, advantages, and disadvantages
Outcomes	- Same task, different outcome for every learner - Supports developmental paths on a more personal level - Can cause a feeling of inadequacy if the outcomes are not set properly
Tasks	- Different tasks developed according to the baseline assessment - Highly likely that the tasks will be achievable, and therefore motivate the learners - Heavily depend on the educator's judgement
Support	- Different levels, different resources for supporting different learners - Can be used with peer-to-peer support, empowering - May take a lot of time for monitoring and facilitating

Adapted from Haynes, 2010

Most often differentiation is done by setting up a task and then defining how it could be done on a spectrum "from most to least able". This can pose a challenge because the abilities of one learner can vary across different tasks, and because ability is often mixed with attainment (how much someone can remember at a certain point in time).

Should you then always make individual plans for each person in a group? While the answer again depends on the context of your work and the number of learners in your group, this process would most likely be too time-consuming and could pose a challenge to monitoring your learners' progress. Therefore, while planning differentiation you should try to[8]:

- Aim for clear and effective ways for differentiation, not perfect and detailed plans for each learner,
- Be creative and flexible, think back and forth throughout your plans and explore different ways you can reach the objectives and learning outcomes.

[8] Haynes (2010), *The Complete Guide to Lesson Planning and Preparation.*

Application in different settings:

Face-to-face	Synchronous	Asynchronous
Apart from the outcomes, tasks, and support, differentiation can be done through modifying content (every learner chooses a different topic to work on, but the outcomes should be the same for everyone) and the environment (Tomlinson, 1999). Although it might seem that the environment can be easily controlled in face-to-face settings, it is often more challenging to monitor and manage differentiation when working with a group (e.g., you might not have space for learners to work independently). Here your biggest asset is the possibility to give timely support to your learners. Keep their needs and interests in mind, ask for feedback regularly, and plan time for observation. Differentiation should be included in every aspect of your course design (from planning outcomes to assessment).	In designing courses in which most lessons are delivered synchronously, you can make certain modifications at the beginning to ensure everyone has a good starting position: plan for shorter sessions, more frequent breaks, and include methods and activities that will encourage your learners to use their body and surroundings. Offering immediate support might not be always possible (especially if it concerns technical difficulties), so make sure you establish support mechanisms for different scenarios and create a safe space in which your learners can openly ask for support (from you or other learners). Plan for various engaging methods and materials, so that you include different types of learning preferences. This also applies to the self-study materials and activities you will plan between lessons or modules.	The asynchronous setting gives space to the learners to modify their environment according to their needs and preferences. This might be inspiring to some learners, but gives you fewer opportunities to support them in real time. Use as many digital tools and options on your platform as you can to offer variations to your learners: use assistive technology, let them choose topics or tools they will work with, and set up different levels for completing the course or more complex topics, etc. Celebrate diversity, and use various and engaging materials, methods, and tasks to include different needs and abilities. The asynchronous setting offers a lot of possibilities, but take into consideration the time you'll need to explore, create, and incorporate all the adjustments you wish to include.

6. Resources: time, space, instructional materials

A careful examination of the most important resources you are going to use is crucial for the achievement of objectives and outcomes. They strongly intertwine with the methods and activities, so it would be wise to plan them simultaneously.

Time is one of the hardest resources to grasp, but one that gets easier to handle with experience. **Course design is defined as long-term planning**, which means that it requires you to look at the big picture and envision the whole journey your learners will take with you. At this point, you might benefit from paying attention to **medium-term planning** as well. This refers to the "scheme of work", or a series of connected lessons that comprise a logical thematic unit with specific outcomes. **Consider setting (and celebrating) milestones after a thematic unit is finished**, as this will help your learners have a clear understanding of the course timeline and give them a sense of achievement. Make sure you **present the full schedule to your learners** at the beginning of the course.

Related to the time span of the course, you should also plan **the dynamic, the rhythm, and the pace** of the thematic units. Try to keep a good balance and adjust your expectations from the learners: the course should be motivating and engaging, but not overwhelm your learners with too many resources and assignments in short periods. To find out more about other important aspects regarding time as a resource in education, read our chapter on *Time management*.

Space can refer to physical and online spaces where learning activities are taking place. On the course design level, it is important to map the features of the spaces you need to be able to decide on the use of appropriate methods. Often these processes intertwine in planning and influence each other. When you start planning, you might already know which room or venue you will use to deliver your course or training, and this information will shape your choice of methods and activities. On the other hand, you might have ideas about online activities, but you are still not sure which online tool or platform to use. Either way, while choosing and planning the use of spaces, make sure you compare their features and take advantage of all the possibilities they offer.

Application in different settings (space and time of delivery):

Face-to-face	**Synchronous**	**Asynchronous**
In terms of **time** as a resource, some things might be more flexible in face-to-face education (e.g., you can have longer lessons/sessions, and take more time for certain activities). However, physical presence requires additional preparation time (e.g., travelling or preparing the space beforehand), so take that into account. Always plan an introductory session in which you will lay out the course timeline, deadlines, etc. Where possible, include your learners in timeline adjustments – maybe they need more time for certain activities, less time for others, etc. Face-to-face lessons can last longer if you make them dynamic and ensure that the learners' basic needs are met. **Physical spaces** in face-to-face education allow for proper nonverbal communication. Here, it is vital to develop spatial awareness. As an educator, you have to be conscious of your own body, your body's position in the room, and the positions of your learners.	In an online synchronous setting, you will most likely spend **more time** preparing materials and activities than delivering lessons. During the lessons, you might spend more time adjusting to everyone's technical issues. Keep in mind that lessons in online synchronous courses have to be shorter (e.g., no more than 2 hours per session if you meet 2 or more times per week) and include more frequent and/or longer breaks. **The online spaces** you use here refer to your main platform, and all the other apps you use. In video conferencing, everyone's faces are much closer than in real life, so it might seem that they are in our personal space. This can get intense, so make the window smaller, move the camera farther away, and plan for periods when your learners can shut the camera off or minimize its usage (for example, while you are sharing the screen). Keep your working area clean and practical – it provides a setting for your session.	**The time frame** – the time span and workload of your course should be known to your learners even before they enrol in your course (sometimes this can be a decisive factor). Make sure you prepare an extensive introduction (video, other materials). Since the learners will be going through the course at their own pace (at least to some extent because every course includes deadlines), set a specific time or channel where they can reach you if they need support, and make sure you react promptly. Asynchronous education heavily depends on its learning environment. It is essential to make **the space** easy to use regardless of the platform you are using – Moodle, Udemy, Google Classroom, or others. Organise the material based on your preferred strategies, but make it easy to find and navigate, and don't be afraid to reiterate guidelines. Explore the options to set up a space for informal exchanges between the learners to build a sense of community (e.g., a Facebook group).

Instructional materials are the collection of resources you and your learners use during the course (teaching and learning materials). At the level of course design, you should prepare and compile a list of the main materials that should be included in the course overview or syllabus. Different types of materials, as well as their advantages and disadvantages are presented below[9]:

TYPE	ADVANTAGES	DISADVANTAGES
READY-MADE MATERIALS (done by other educators, institutions, publishing companies, etc.)	- Most likely have a high production level, especially the ones made by professionals in the field - Can be made for specific courses, which can save a lot of time for the educators	- Mass production usually cannot be connected to the specific needs of each educator - Can be biased - May be expensive
SELF-CREATED MATERIALS (include not only the materials that the educators have designed and created themselves but also the ones that were not initially intended to be used for educational purposes, for example, empty bottles used for crafts or adapted game mechanisms – e.g., dixit cards for reflection activities)	- Easier to adapt to a particular group or setting - Support the educator's autonomy and creativity - Usually cheaper	- Time-consuming (the ones you create from zero) - Harder to transfer to a different learning context because they're so specific - May have undetected mistakes

Application in different settings (instructional materials):

Face-to-face	Synchronous	Asynchronous
Collecting or creating materials for face-to-face education can pertain to printed materials or self-study materials (learn more about them in Chapter 5). The media you will use will depend on the technical conditions of the physical space in which your course is taking place, so take that into account while planning. Include various materials to cover for different needs and preferences. The use of materials can be explained on the spot, and you can guide your learners in their use. Think about how you can encourage your learners to make the materials themselves. Make it a part of group work!	The choice of materials for synchronous online education heavily depends on the features of the platform(s) you are using. They can be similar to materials used in face-to-face education (although they obviously cannot come in printed form). Apps like Canva or PicMonkey can help you with templates and ideas. If you want to create interactive materials, you can use e.g., Google Forms or Slides, or other platforms in which your learners can communicate with each other or interact with the materials (comment, like, etc.). For instant feedback and gamification, you can use Kahoot or Mentimeter.	The instructional materials are crucial here because they also act as course instructors in a way (they are "your voice"). Make sure they are clear and accessible (language, presentation) and follow your personal style. Think about a way the learners can track their progress: create a checklist, a progress bar, a different colour for completed tasks, or introduce badges with Canva or Badgelist. Organise the material in chunks corresponding to the content and learning outcomes, and mark the time they will need to complete a task, topic, or module.

[9] Haynes (2010), *The Complete Guide to Lesson Planning and Preparation.*

7. Monitoring progression, assessment, and evaluation

While assessment and evaluation might at first seem to be on the opposite side of planning, it is of utmost importance to carefully plan them in advance. Mechanisms for monitoring, assessment and evaluation should be integrated into the learning process before it ends, as this will help both learners and educators to have a clear overview of the process, be able to reflect on it, make timely adjustments along the way, and map the aspects that should be improved in the next cycle.

On the course design level, it is important to first decide on the intervals and the pace of all three mechanisms. **Monitoring progress and assessment** will probably occur more frequently, and they can be done through shorter or more elaborate activities like revision, entry and exit tickets, summary stories, and others. Before their implementation, make sure you communicate their purpose to your learners, and choose questions or tasks that reflect the learning outcomes. **Evaluation** is done to determine the quality, value, effectiveness, and importance of different aspects of the learning process and can be done through similar tools as monitoring and assessment, but with a different purpose. Cultivating and modelling reflection and self-reflection is an important base for gathering information for all three mechanisms, as well as for giving and receiving feedback, so choose and incorporate your strategy wisely.

Application in different settings:

Face-to-face	Synchronous	Asynchronous
Monitoring and assessment have to be implemented at a regular pace. There are numerous longer and shorter activities you can easily implement in your lessons or between them in face-to-face settings (in written or oral form). Categorising **evaluation** can be done through answering a few key questions: when, what, and who. *When* is a matter of timing. You can evaluate different aspects during the lessons, at the end of a module or at the end of the course. *What* refers to the data you want to collect. You can ask the participants to evaluate the structure or the content, the communication within the group, etc. The effectiveness of the course on your learners' knowledge or skills can be evaluated through a "before" and "after" assessment. *Who* evaluates what is also important: your learners can evaluate your work, but self-evaluation is also very important for both of you.	**Monitoring and assessment** can be implemented in a similar way to face-to-face settings, in written or oral forms, individually or in a group, but with the use of digital tools. Plan for meaningful assessment that is in line with the learning outcomes and that fosters consolidation and further learning! To implement **evaluation and self-evaluation** strategies, you can follow the same guidelines as in the face-to-face context. However, here you can make more use of the time in between the lessons or modules (like individual or group tasks that can be completed asynchronously) to save time during your lessons, and to encourage reflection and self-reflection. For all three mechanisms, you can use apps like Mentimeter, Jamboard and Ideaboardz. For a quick and easy feedback, use the tools you already have on your platform(s), like emojis, chat, polls, etc.	Since **monitoring and assessment** cannot be done in real time, you need to plan for more frequent and shorter activities during the lessons and at the end of each module. Your learners will benefit from self-monitoring: include checklists, progress bars, and badges to celebrate achievements. Be creative and try not to repeat activities: set up different tasks that will require your learners to produce and post content (like videos, audio recordings, visuals, etc.) and engage them in peer monitoring and assessment. **Evaluation** can be done through similar activities and tools as in other settings. In using online survey tools such as Google Forms or Lime Survey, keep the evaluation form concise and straightforward. Use fewer open-ended questions – save them for different types of tasks in which deeper insights will be the focus.

8. Questions for reflection

1. *Think of all the steps and tasks you need to do to design a course. Which tools and strategies can you use to make this complex work easier and more efficient?*
2. *How would you describe a good planner? Which key attitudes, traits and behaviours can you identify? How do your personal traits and style of work match this image?*
3. *Which step in course design seems to be the most challenging to you in face-to-face, online synchronous, and online asynchronous settings and why? Pick one step for each setting, but remember that we are talking about designing and planning, not implementation!*

9. References and resources

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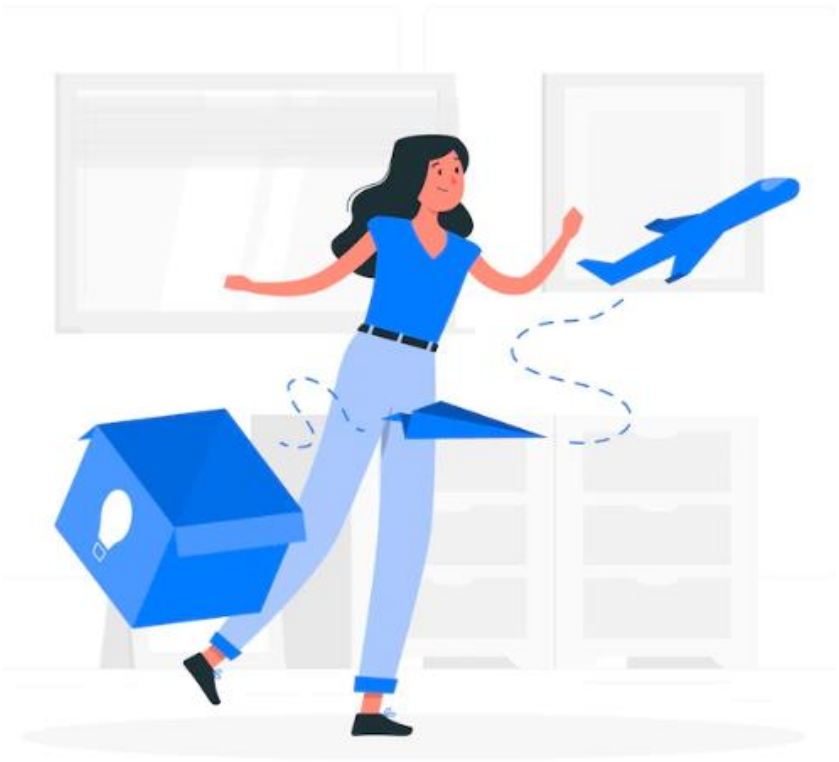
Chapter 3: Lesson planning

This chapter analyses the elements of an effective lesson plan and the most common strategies for efficient lesson planning, outlining how to use them in face-to-face and online learning environments. After reading and exploring the chapter, you should be able to:

- ✓ make an outline of a lesson plan tailored to your context and your learners' needs,
- ✓ apply appropriate strategies in planning face-to-face and online lessons.

The chapter includes the following sections:

1. Preparation is half the battle – the importance of planning in education
2. What should you plan and how should you plan? The role of the educator
3. How to create a perfect lesson plan (or a perfectly good lesson plan)
4. Lesson planning in face-to-face, synchronous, and asynchronous education
5. Challenges in planning online lessons
6. Questions for reflection
7. References and resources



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1. Preparation is half the battle – the importance of planning in education

Planning is often viewed as one of the key elements for a successful and efficient learning process. It outlines the journey we want our learners to take so they can gain something valuable from the experience. At the very least, our plans should answer the following questions:

1. What do I want my learners to gain? What do they want and need?

2. How will the learning process be facilitated?

3. How will we know we achieved our goals?

In terms of the time span, we can differentiate between long-term planning (course or curriculum design), medium-term planning ("scheme of work", a series of connected lessons), and short-term planning (lesson/unit/session/workshop design). Even though the scope for each type is very different, we can use the same questions in any of the planning we do. However, given that lessons are directly connected to our performance and our learners' performance, their outlines should be planned in more detail.

The term "lesson" in this context is most often understood as a single class or part of a course, but the process and key elements of lesson planning can be applied to different types of learning experiences in non-formal education (such as workshop or session design or any other type of unit). Keeping that in mind, the working definition of a **lesson plan** we chose for this handbook is that it is **"a concise, working document which outlines the teaching and learning that will be conducted within a single lesson"**[10]. In online education, a course is most often divided into modules or instructional units, and modules are divided into lessons (the smallest units). Depending on how the course is designed, the modules can be approached as lessons, and the principles presented here can be similarly applied to them.

[10] Butt (2006: 21), *Lesson planning*, 2 ed.

Lesson planning attends to the objectives of a course (or a different type of learning process). It serves as a tool to guide both the educators and the learners. On one hand, effective planning enhances the educator's performance and provides a meaningful and engaging learning environment. Having a clear vision helps educators tackle potential management issues during the learning process, which can positively affect their confidence. Research (e.g., on university students and pre-service teachers) shows that planning educational strategies increases the effectiveness of their work and the educational process in general[11]. On the other hand, sharing the outline of a good lesson plan with the learners helps them as well, as they benefit from having a clear overview of their learning process – it can help with their planning strategies, motivation, and accountability.

Learner-centred lesson planning enhances the quality of educational processes and makes them more effective and purposeful. According to some authors[12], lesson planning functions as a tool that:

- boosts learners' self-confidence,
- helps educators to organise instructional elements to be used for learning,
- enables educators to monitor, evaluate and adjust their activities,
- helps educators and learners to adopt reflective thinking.

Design: freepik.com

In short, **having a clear and concise idea of what you want to achieve, how you want to achieve it, and how you will monitor the progress helps both you as an educator and your learner to dive into the process more confidently and to attain a sense of ownership.**

[11] Womack et al. (2015), *Most Effective Practices in Lesson Planning*; Süral & Dedebali (2021), *The Predicitve Power of the Curriculum Literacy Levels*
[12] Senemoglu (2003) in Süral (2019:1), *An Examination of Pre-Service Teachers' Competencies in Lesson Planning.*

2. What should you plan and how should you plan? The role of the educator

Lesson planning is an **intersection between content knowledge (what is taught) and pedagogical knowledge (how it is taught and evaluated)**. Good lessons reflect the educator's understanding of the principles of quality pedagogic practice, of how a particular group learns (children, youth, adults), his/her ability to learn from their experience and his/her understanding of why certain things happen during the learning process. Much of the challenges that occur during the learning process can be related to the lack of effective planning and preparation[13].

But how much planning is enough planning?

Some practitioners advocate for planning each lesson fully, explicitly, and in writing[14]. This position views detailed plans as a space for ensuring more confidence and better risk management in teaching and learning. Others question the necessity of detailed planning, claiming that extensive written preparation might have a negative influence on pedagogical effectiveness. The key issue for them is certainty, not exhaustiveness, so more emphasis should be put on meeting the objectives[15]. Here, it is important to understand that **a lesson plan should serve as a practical instrument**, and not be a burden in the process.

Before you start planning, keep in mind:

- You cannot predict and control everything that happens during the learning process. However, there is a high chance that the more structured your plan is, the more successful and meaningful the learning experience will be.
- You will need to accept responsibility for possible modifications in the process according to your learners' needs and progress.
- Your plans should be in line with your individual style. Authenticity is an important factor in the success of your work.

What should you plan?

Lesson planning, like course design, is often viewed through the journey analogy. **You need to define the key points of your learner's journey in advance**: the starting point, the final destination, the mode of travel, and the "check-in" mechanisms. The journey analogy is further explained below and aligned with the necessary steps the educator must take before the take-off. The steps also describe the key elements of a good lesson plan.

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[13] Butt (2006), *Lesson planning*, 2 ed.
[14] Haynes (2007), *100 Ideas for Lesson Planning*; Haynes (2010), *The Complete Guide to Lesson Planning and Preparation*
[15] Womack et al. (2015: 21), *Most Effective Practices in Lesson Planning.*

Parts of the journey to be defined	The steps the educator has to take to plan the journey
What is the starting point? *(the learners' previous knowledge and experience, their expectations, specific needs and resources they can invest…)*	**Needs analysis and baseline assessment.**
What is the final destination? *(the knowledge, skills, attitudes or values they will gain during and after the process is done)*	**Set objectives and learning outcomes.**
What is the mode of travel? *(how fast will the process be, which methods and activities will lead the learner to their destination…)*	**Decide on the pace, the methods, the activities, instructional and self-learning materials, the homework…**
How will you and your learners know you got there? *(the mechanisms to monitor if you got to the right spots, and what was gained on the way)*	**Prepare a plan for monitoring progress, develop assessment and evaluation instruments**

And who are you, the educator, in this journey? Surely you cannot always be in control, as you need to provide autonomy to your learners in their own learning process. You do, however, have the leading role in planning and designing the journey, so you can take that time to reflect on the different roles you will be having during the process.

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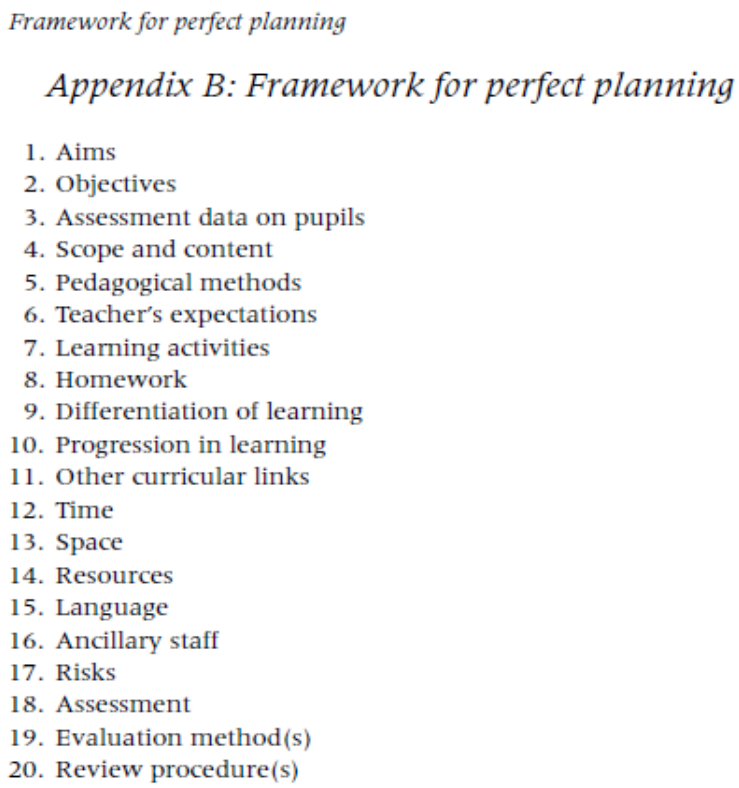
3. How to create a perfect lesson plan (or a perfectly good lesson plan)

There is no definite answer to what the perfect plan should be comprised of. **In our view, the perfect plan is one that suits your needs, and ultimately, benefits the learning process.** A good lesson plan should contain (at least): the needs assessment and baseline assessment, learning objectives and outcomes, methods and context, and monitoring and evaluation mechanisms.

What you need to plan depends on the context in which you work, the needs of your learners, and the setting in which a particular lesson is held (for example, face-to-face or online). Keep in mind that the context might change depending on different factors: the progress of your learners, your relationship with them, other stakeholders' interests, changes in available resources… Therefore, it is also very important to monitor and revise your plans in line with the "bigger picture" (the objectives of your course or programme and other objectives that might be related to that particular lesson).

One of the most extensive lists of elements of a lesson plan (used in formal education) was compiled by Anthony Haynes (below). In addition to this framework, lesson plans often contain administrative data on the learners (the number of learners, their age, the date and the venue where the lesson will take place, etc.).



Framework for perfect planning

Appendix B: Framework for perfect planning

1. Aims
2. Objectives
3. Assessment data on pupils
4. Scope and content
5. Pedagogical methods
6. Teacher's expectations
7. Learning activities
8. Homework
9. Differentiation of learning
10. Progression in learning
11. Other curricular links
12. Time
13. Space
14. Resources
15. Language
16. Ancillary staff
17. Risks
18. Assessment
19. Evaluation method(s)
20. Review procedure(s)

Framework for perfect planning *(Haynes, 2010: 168)*

The thought of planning every lesson according to 20 or more segments probably sounds overwhelming to most educators, but it is important to remember that the plan should serve you and your learners and that **ultimately, the choice is yours**.

In terms of both formal and non-formal education, the abovementioned elements can be grouped to represent a structure for a good lesson plan that can be applied to other types of units as well (workshops, sessions, etc.): **1. Baseline and needs assessment, 2. Learning objectives and outcomes, 3. Content, pedagogical methods and activities, 4. Differentiation in learning, 5. Resources – time, space, instructional materials, and 6. Monitoring progress, assessment, and evaluation**.

Some of the elements are discussed in more detail in Chapter 1 (*Course design*), as they represent a framework for both long-term and short-term planning. Here we will examine each of them in the context of lesson planning.

1. Baseline and needs assessment

To ensure the learning process will be meaningful to the learners, the planning should start from their interests, needs, and existing resources (knowledge, skills, attitudes, the time they have at their disposal, their employment and financial status – if relevant, and other relevant resources).

Needs assessment refers to the process of gathering data on the knowledge, abilities, interests, or attitudes of our target group. It can be done through an indirect approach (like mapping existing research) or through direct contact with the target group (surveys, interviews, focus groups, working groups, etc.). In terms of lesson planning, it should be viewed as part of a broader context – course design, training design, or other types of educational programmes. This means that you don't have to assess your learners' needs before every lesson – your plans will be based on previously collected data. Before the beginning of the course, the needs assessment should provide you with enough information to define every key aspect of the lesson. You can even do smaller-scale needs assessments during the learning process to keep track of the changes in your learners' needs and to plan for modifications.

Baseline assessment is a process of gathering primary data on the learners' knowledge and experience in a specific area (e.g., how much they know about women's rights movements or what experience they have in advocacy). This can be done through questionnaires, tests, quizzes, informal observations from the educator, etc., usually at the beginning of a course or a thematic unit (a series of connected lessons). It functions as a reference point at the beginning, during and after the course or programme has finished, so you can use it to monitor your learners' progress. Make sure you communicate the point of the baseline assessment to your learners, as this will support their sense of ownership over the learning process, and ease possible negative feelings they might have toward "knowledge tests".

2. Objectives and outcomes

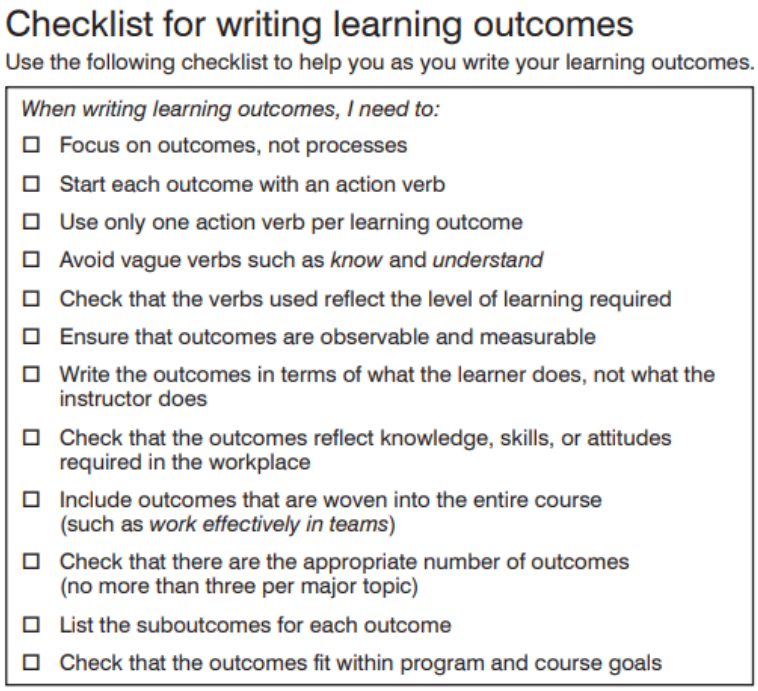
The terminology related to **goals, objectives, and outcomes** in education is still not universally agreed upon. Even Bloom's taxonomy revision authors state that the "objective is not the only term used to describe an intended student learning outcome"[16]. We opted for including a distinction between the three that, in our view, makes a coherent framework for planning a learning process:

1. Learning goals are the "highest" category and convey what educators, and other stakeholders (e.g., project donors, the government, or another group from the community), want to achieve as a result of the course or learning process (e.g., *To increase media literacy and critical thinking among international trainers*). They shape the way you will define the objectives and outcomes for each lesson.
2. Learning objectives are educator-centred and focused on what the educator wants to do to achieve the course goals. They can be written in relation to the content and methods (example: *To discuss different types of fake news and the tools used to recognize them*), or in terms of what is expected from the learners (example: *To increase the trainers' understanding of different types of fake news and how to use specific tools to differentiate between them*). They are broader than learning outcomes.
3. Learning outcomes are learner-centred and tell us what the learners will be able to do after they've gone through a learning process/experience (example: *At the end of the lesson, the trainers will be able to* ***categorize*** *fake news according to at least 5 different types of fake news*). They should be **measurable, concise, meaningful, relevant to the learners, and achievable**.
You can find out more about the definitions and their relationships in this video. Regardless of the terminology, the concept of defining learning outcomes is used in all forms of education. Setting and communicating the outcomes to your learners gives them a clear idea of what is expected and more control over their learning process.

One of the most widely used, and probably the most well-known tool for writing learning outcomes is **Bloom's taxonomy – a taxonomy for learning, teaching, and assessing,** developed in 1956. It provides a framework for categorizing learning outcomes (originally referred to as educational objectives) and is based on **four general types of knowledge**[17]: factual (knowledge of "bits of information", e.g., terminology), conceptual (knowledge of complex and organised forms, e.g., categories and principles), procedural (knowledge of "how-to", e.g., certain techniques, or methods) and metacognitive (self-knowledge and strategic knowledge). It follows **a hierarchy from low-order to higher-order thinking skills**, presented through different categories. You can find out more about how to write good learning outcomes and different examples in this handout or this video.

[16] Anderson & Krathwohl (2001: 18), *A taxonomy for learning, teaching, and assessing: a revision of Bloom's taxonomy of educational objectives.*
[17] Anderson & Krathwohl (2001: 27)

In writing the outcomes, you can use the following checklist:



Checklist for writing learning outcomes

Use the following checklist to help you as you write your learning outcomes.

When writing learning outcomes, I need to:

- ☐ Focus on outcomes, not processes
- ☐ Start each outcome with an action verb
- ☐ Use only one action verb per learning outcome
- ☐ Avoid vague verbs such as *know* and *understand*
- ☐ Check that the verbs used reflect the level of learning required
- ☐ Ensure that outcomes are observable and measurable
- ☐ Write the outcomes in terms of what the learner does, not what the instructor does
- ☐ Check that the outcomes reflect knowledge, skills, or attitudes required in the workplace
- ☐ Include outcomes that are woven into the entire course (such as *work effectively in teams*)
- ☐ Check that there are the appropriate number of outcomes (no more than three per major topic)
- ☐ List the suboutcomes for each outcome
- ☐ Check that the outcomes fit within program and course goals

Taken from: British Columbia Institute of Technology (2010:8)

In 2008, an interesting addition to the taxonomy was presented, stating that **some verbs are specific to the online learning environment**. Some of the examples for different categories of skills include[18]:

- **Remembering**: bullet pointing, bookmarking, "googling", etc.
- **Understanding**: advanced and Boolean searching, tagging, annotating, etc
- **Applying**: running and operating (e.g., an app), uploading, sharing, etc.
- **Analysing**: mashing (mashups), linking, reverse-engineering, etc.
- **Evaluating**: commenting and reflecting, posting, moderating, validating, etc.
- **Creating**: programming, filming, podcasting, remixing, publishing, etc.

Apart from the cognitive domain, the taxonomies for **affective and psychomotor** types of learning were developed. You can find more about them here and here.
Another important thing to note is that learning can be unintended, and it can be described by the category of **expressive outcomes.** They can be the results of activities that had no intended or explicit learning outcomes, but the learning happened anyway (e.g., visiting a virtual exhibition, seeing a theatre play, etc.), and they usually complement or modify existing knowledge (read more about the theory here). The opportunities for unintended learning are great within the digital realm where the access to information is faster, but expressive outcomes are harder to observe and monitor in online education. Make sure you ask your learners for feedback and monitor their learning process regularly.

[18] Churches (2008), *Bloom's Digital Taxonomy*

3. Content and pedagogical methods

Content and methods should stem from the learning objectives and outcomes. They are intertwined with all other elements of planning too (e.g., your choice of methods might depend on the space and time you have at your disposal).

In course design, **you can organise content in different ways** (again, depending on the objectives and outcomes you set): you can cover topics chronologically (e.g., procedures, processes, timelines…), categorically (e.g., introducing *energizers, warmers, and coolers* as categories of managing your learners' attention and energy levels), through cause and effect (e.g., in talking about policy), from simple to complex (e.g., covering a definition and main aspects of a concept, and then its application), etc. You can find more examples here, or in our chapter on *Course design*. Same strategies can be used for unit or lesson planning, but on a smaller scale. A common practice in delivering content is **chunking** (breaking it down into smaller sections), very often used in online courses. **Each lesson should cover one or two key concepts**, especially if they are new to your learners. A good way to enhance learning when introducing a new concept is by connecting it to the learners' previous knowledge (ask them what they know, use analogies and examples, and consult the results of the baseline assessment).

The methods should be explicitly stated in the lesson plan, and there should be a short description of the activities. Before choosing the methods, make sure you have a clear vision of the type of learning experience you want to implement (active learning, cooperative learning, e-learning…). There is a myriad of teaching and learning methods you can choose for your lessons (to name a few most widely known ones: group discussion, debate, lectures/presentations, role-playing, theatre, dramatization, art-based projects, video creation, case studies, flipped classroom, educational games, group/individual research projects, storytelling, problem-solving activities…). While your choice will heavily depend on whether they're implemented in an online or in-person setting, a few key points should be noted for each situation:

- Make sure the methods are in line with your style and reflect authenticity,
- Vary the methods in a series of connected lessons as much as you can to include different learning styles and preferences,
- Make sure you are familiar with the proper use of the methods you choose,
- Learn all about digital tools you want to use before you put them to practice.

4. Differentiation in learning

In planning your lessons, always keep in mind that one size does not fit all, because your learners might differ according to their motivation, readiness to learn, abilities, personal traits, cultural backgrounds, etc. The needs and baseline assessment should give you a direction in setting necessary adjustments for your learners, but they cannot give you a ready-made list of differentiation methods.

Since differentiation is often seen as *a way of thinking* about educational processes, it may require changes and improvisation along the way. Still, there are strategies you can apply in the planning phase, and you can always outline possible scenarios and how to address them (e.g., a group of learners will finish a task much earlier, or someone might not want to participate in an activity).

You can work on differentiation through[19]:

- **Content** (e.g., learners choose to work on a different topic to reach the same learning outcomes),
- **Process** (e.g., learners have different tasks, but work on the same content),
- **Product** (e.g., learners create different results (essay, infographic, video) based on the same content or learning outcome),
- **Affect / Environment** (e.g., the setting in which they are going to work – in a group, individually…).

Another division can be done according to[20]:

- **The outcomes** (same task, different outcomes/results of the task),
- **The tasks** (different tasks based on the same learning outcomes),
- **The support** your learners need (different levels of support).

Most of the resources dealing with differentiation come from formal education. Explore Carol Tomlinson's diagram, read this article or watch this video to understand more about why and how to differentiate. Think about how you can apply different strategies in working with learners with disabilities. Learn more about strategies like scaffolding, cubing, tiering, Think-tac-toe or project-based learning to get ideas for your lessons.

5. Resources: time, space, educational materials

Resources should be mapped, and their use should be planned in parallel with the methods and activities, as they have a great influence on each other.

Time is one of the crucial things to handle. You can find out more about the most effective strategies in our chapter on *Time management*. In this section, we will just briefly point out some of the methods that can help you handle time productively related to the planning and preparation phase:

- Act it out: before you present activities or instruct your learners in an asynchronous setting, try it out yourself and record the time,
- Pay special attention to planning the start ("the pitch deck" or your introductory presentation in person or recorded online), as it usually sets the tone for the rest of the lesson,
- Compare the tasks for your learners to other everyday tasks you do to get another input for approximation,
- Make the plan more flexible so you can efficiently manage the risks,
- Plan best and worst-case scenarios.

[19] Tomlinson (1999)
[20] Haynes (2010)

Pay attention to planning **the dynamic, the rhythm, and the pace**. It is important to vary the tasks and to take different learning needs into account. You shouldn't be going too fast and plan too many activities in one lesson, but you should also be careful not to give your learners the opportunity for distractions or boredom. Try introducing milestones within a lesson or a series of lessons. Acknowledging that we finished something and are moving forward gives us a sense of completion and achievement.

Lessons can be delivered in **physical or online spaces** (conferencing platforms or LMS platforms). Some key factors to consider in physical spaces are the size of the room, the shape, the layout, the technologies you have at your disposal, etc. The same lesson can turn out to be very different in different spaces, so it would be beneficial to know as much as you can about the venue. It will also help you plan the time, the methods, and the needed support for the learners (plan for inclusion and mind possible barriers). Online spaces can vary depending on whether the lesson is delivered in a synchronous or asynchronous setting. One of the challenges here is that while there are quite a few free online conferencing and LMS platforms, you might have different needs and plans for different lessons which will require paid features. Apart from that, the biggest challenge is the internet connection and technical conditions your learners have. Keep in mind that although you cannot have an influence on that, good planning and preparation will help you deal with the challenges in the delivery. Here you can also plan best and worst-case scenarios and come up with alternatives for possible problems.

Educational (instructional) materials can be ready-made or self-created and can vary from different audio and visual media (videos, presentations, charts, maps…) to written materials (books and textbooks, articles, handouts…). They are equally important in face-to-face and online settings, as they guide and help the learning process. In cases of online asynchronous courses, however, they are the main source of instruction for the learners, so you should plan them in more detail. **Planning self-study materials** shouldn't be seen as just an addition to the process, as self-learning should also be a meaningful and engaging experience. Self-study materials can enhance the learning experience or serve as a preparation for the next lesson (for example, in flipped classrooms). The tasks should vary and have their learning outcomes (read more in our chapter *Assigning and creating self-study materials*).

Here are a few important questions you should answer before deciding on which materials to use in your lessons (both in-person and online):

- Is the material suitable in terms of its visual appearance (font, colours, line spacing, etc.)?
- Is the language user-friendly?
- How are the concepts and ideas presented? Do they follow a logical flow? Are they appropriate for your target group?
- Can the material be modified according to your learners' specific needs?

6. Monitoring progress, assessment, and evaluation

Even though monitoring, assessment, and evaluation are often seen as end parts of an educational process, they should be carefully planned from the beginning, as they serve as a basis for improving the ongoing and the next learning cycle.

Monitoring progression is done throughout the learning process, e.g., during lessons, weekly, monthly, etc. It can help you decide when your learners are ready for the next step (monitoring learning outcomes), how to make the transition from one piece of learning to another, and how to build on their existing knowledge and skills.

Assessment can be defined as "the process of gathering, interpreting, recording and using information about learners' responses to educational tasks"[21]. It serves as a tool to get to know your learners, give feedback to the learners ("feedforward"), encourage self-assessment in learners, and identify strengths and challenges in preparing for future work.

While planning assessments, **keep in mind these steps to ensure efficiency**:

- Decide on the purpose of assessment,
- Choose the questions carefully ('the art of inquiry' is an important soft skill here!),
- Use a variety of methods and questions,
- Review the relationship between assessment methods and learning outcomes.

Adapted from Haynes (2010) - *The Complete Guide to Lesson Planning and Preparation.*

Here are a few techniques you can use for monitoring and assessment: reflection, revision, entry and exit tickets, summary stories, and others. Among the many roles assessment can have, it can also have an evaluation role, so it can provide information that can be used to make judgements about the effectiveness or quality of different aspects of the learning process. This means both progression and assessment data can serve as a basis for evaluation.

[21] Lambert & Lines, 2009 in Haynes (2010: 152)

Evaluation refers to a broader perspective and involves looking at all the factors that influence the learning process, such as course design, materials, methodology, performance, and assessment[22]. It is primarily focused on determining the quality, effectiveness, value, and importance of different elements. In education, it should be done through a comprehensive and holistic approach and consider not only what was planned, but also what occurred beyond your objectives and outcomes.

Some practitioners[23] suggest the following useful self-evaluation techniques for educators: assumption hunting (critical examination of the gaps between the theories we believe in, and the ones we actually use), action planning (developing a set of questions and actions for a particular aspect of your practice that will guide you in experimenting and implementing changes), and keeping a reflective journal. Getting feedback from your learners (and colleagues, if possible) is also very important: choose one aspect of your lesson and have them give you examples (three good things, one thing that was missing…), have your colleagues give you feedback on your portfolio, use techniques such as "traffic lights" or "mood meters" with your learners, send out questionnaires… Most importantly, use various methods and include different groups to grasp the whole process successfully.

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[22] Harris & McCann (1994: 2), as in Mathew & Poehner (2013: 3)
[23] Kahn and Walsh, 2006, in Haynes, 2010

4. Lesson planning in face-to-face, synchronous, and asynchronous education

Face-to-face education	Synchronous education	Asynchronous education
Needs analysis and baseline assessment can be done through an indirect or direct approach. The indirect approach is the same in any educational setting (e.g., exploring research), but the direct approach (interviews, focus groups) is fairly different in face-to-face settings. Here you can set up meetings with your learners during which you can promptly react to any verbal and non-verbal cues. If you opt for a questionnaire for needs assessment or a test for baseline assessment, you can offer immediate support to your learners in real time. In face-to-face settings, it is usually easier to monitor whether your learners understand what they need to do and whether they can follow your instructions.	The methods here are similar to face-to-face education. When organising a meeting (focus group, working group, interview) using a video conferencing tool, keep in mind the safety measures (use a password for the meeting, enable or disable certain options, etc.), inform your learners on the purpose and the preferred prerequisites and ask for their consent (e.g., they will need a camera or the meeting will be recorded). Plan for possible scenarios in which some aspects won't go according to your plan. Baseline assessment can be interpreted as formal assessment (quizzes, tests…), so make sure you communicate its purpose beforehand so that your learners feel safe and follow all your instructions.	In asynchronous education you might want to rely more on research findings and past experiences in needs assessment. If you plan to do needs and baseline assessment using only asynchronous methods, make sure you communicate their purpose and instructions on how to participate explicitly, in a video or in writing, and make that available to the learners at all times. Informal observation as a tool for baseline assessment is very different in an asynchronous setting. For example, you won't be able to monitor group work as you usually would, so you need to apply different strategies (e.g., monitor discussions on a forum, ask your learners to reflect more in writing, etc.).
In face-to-face settings, you can plan **learning objectives and outcomes** according to the known principles and practices (presented in the previous section). On average, one major topic of your course (covered in a series of lessons) should have up to three learning outcomes, so one lesson could have one to three (sub)outcomes related to them. Make sure you write one verb per outcome to preserve clarity. The verbs you choose should match the levels of learning you planned and be measurable.	In online synchronous educational settings, you can follow the same principles as in face-to-face settings, but since the online meetings/sessions in real time should be shorter and include more breaks, the objectives and outcomes should be adjusted accordingly. Set one to three outcomes per lesson, and make sure they are measurable and observable. If you want to include higher order cognitive categories or outcomes from the affective domain, it is better to set one outcome per lesson.	Since monitoring the acquisition of learning objectives and outcomes in real time in online asynchronous education is oftentimes not possible, and the support you can offer to your learners is limited, you need to apply different strategies: the outcomes should be explicitly stated and accessible to your learners, as well as your instructions, and you should include more monitoring, feedback and reflection strategies. Again, one lesson should cover one to three learning (sub)outcomes.
In any type of setting, **content and methods** should be explicitly stated in the lesson plan. Make sure you first organise content delivery (simple to complex, cause and effect, chronologically, categorically…) in relation to a series of connected lessons, and then decide on the content for one particular lesson. Each lesson should cover one or two key concepts, and a limited amount of new information (e.g., 5-7 in new vocabulary). Your choice of methods should derive from the	Content delivery and methods are very different in online and face-to-face settings. You should plan for proper use of chunking (breaking down content into smaller sections) and use less complex strategies because of the limited screen time. Combine content delivery with self-study materials for your learners. You might want to transfer some of the methods from the face-to-face setting, so think about possible modifications (e.g., breakout rooms for group work), but don't forget to use the tools and resources that	Content delivery is crucial for a successful online asynchronous lesson. Here the "chunks" of content should be even smaller. Include as many different content delivery methods as you can (visuals, texts, videos, audio materials) as well as interactive tools (games, quizzes, tests, flashcards). Since communication with other learners can be very beneficial, try to include a space for interaction and community building (FB group, forums, discussion boards, peer-to-peer reviews…).

intersection between the learning outcomes and the content, but keep in mind all other aspects of lesson planning (differentiation, resources, assessment…).	might not be available "offline". Most importantly, ensure everyone can participate actively and equally.	Before the planned start of the lesson, you might want to ask a colleague to test it to see if everything is working properly and the instructions are clear and accessible.
Differentiation can be done in relation to the content, the process or the tasks, the product, the environment and the support your learners need. Before planning, think about your learners' needs, interests, readiness and learning profile, and adjust the learning outcomes accordingly. Make sure you include enough variety in your content and methods, and plan for different monitoring and assessment strategies. Explore how you can use the time and space you have at your disposal, as well as the support in real time you can give to your learners, since those are the biggest advantages in face-to-face environments.	Planning screen time requires more adjustments for everyone, regardless of their specific needs. Plan for shorter sessions, longer or more frequent breaks, and include tasks that require body movements or time away from the screen. Pay special attention to your learners' environment or the support they might need. If possible, set up extra time for those who need more support of any kind. Prepare possible modifications or alternative solutions if your learners cannot participate in real time due to technical or other difficulties. Again, think of how you can use their preparation time or follow-ups.	Asynchronous education allows for many types of differentiation, but it might require more of your time and can be limited to the learning platform you are using. Since the learners can finish the lessons at their own pace, this setting allows them to adjust their environment according to their needs. To make your lessons more accessible, you can set up different levels for outcomes and tasks, and give your learners more choice. Use a variety of instructional materials to cover for different preferences and abilities. In addition, you can explore how to include assistive technologies to your materials (text-to-speech, graphic organizers…).
Resources are closely related to the delivery of content and methods, and sometimes even influence the decision on what to include in a lesson (e.g., you might not use some methods if you don't have adequate space). Although they have their limitations, in face-to-face settings time and space are easier to manage and modify. Use various instructional materials to include different needs and preferences.	The online spaces (platforms) you use determine your choice of methods and materials. Make sure you explore all the options (and if you need to pay for certain features) before deciding on how your lesson will be delivered in real time. The time you have is more limited since screen time activities require more adjustments, more breaks, etc. The materials all have to be in digital format and accessible to every learner.	Time can be a great asset in this setting, since the learners can work at their own pace. However, this means they have to manage time on their own, so make sure you include notes about how long something will take. In terms of space and materials, you don't have to limit your lessons to one online platform. Use all available resources for any purposes that will help your learners grow and achieve the outcomes.
Monitoring progress and assessment allow for various methods and techniques in face-to-face education. You can observe how your learners behave during lessons, how they interact with others, their non-verbal cues, etc., and see the changes in their behaviours or attitudes more easily. Make sure you plan your short monitoring sessions for each lesson. It would be beneficial to encourage evaluation and self-evaluation throughout the course, so plan your lessons accordingly.	Plan for interval monitoring, assessment and evaluation, but make sure you use short activities related to them in your online sessions as well. It might be harder to monitor certain aspects during the lessons (e.g., group work if they're using breakout rooms or non-verbal cues with camera off), but you can still use different efficient methods for feedback with the tools you have at your disposal (e.g., emojis, video filters, chat, quizzes, tests…). This will provide data for evaluation and can be used for self-evaluation.	Gathering data for monitoring, assessment and evaluation in real time is almost impossible in an online asynchronous setting. This is why you need to plan for more frequent and shorter activities for monitoring and assessment, and set separate tasks for reflection, evaluation, and self-evaluation. You can set up a mechanism for tracking progress that your learners can always keep track of. Try to include a variety of mechanisms and tools and make sure you give effective and timely feedback!

5. Challenges in planning online lessons

Difficulties can arise in any planning any component of a lesson. The complexity of lesson planning should be approached by examining each element separately, but keep in mind that they are all connected and interact with each other. Here are some of the major challenges in planning online lessons and tips on how to approach them:

Challenge	Tips
Designing a plan directly related to your learners' needs and interests It is hard to include every learner's need and interest into every lesson, which is especially true if you cannot reach a particular group before the course starts.	You can rely more on existing research on your target group but try to plan for at least some baseline and needs assessment – you can plan one lesson just for that at the beginning. Include short quizzes and various feedback mechanisms to modify the lessons as you go.
Differentiation in learning It is hard to adapt one lesson to fit every learner individually, especially in online settings in which your learners might have more distractions in their surroundings, more technical issues, and a lack of immediate support (if needed).	Include as many different methods and activities as you can, as well as materials that arouse creativity and interest, and provide explanatory and interpretative materials to clarify the subject matter[24]. Keep in mind that differentiation is a way of thinking, and that sometimes small modifications are enough (e.g., include a transcript for the videos you post). Include enrichment materials: allow the learners to dig deeper in self-directed learning, include various reflection and self-evaluation methods, and ask for feedback regularly.
Time management Time allotment and controlling time are considered among the most difficult aspects of lesson planning[25].	Be considerate of the learning pace and rhythm in asynchronous settings: be consistent in uploading assignments, give the learners enough time for preparation, give an overview of the lessons, include to-do lists, give your learners guidelines on how to manage distractions in your working space, and give them mechanisms for monitoring their progress. In planning for a synchronous setting, you can act out some of the activities, decide on a timekeeper in advance, plan for enough breaks to keep the focus clear, and plan for core/base and extra activities.
Assessing and monitoring what is "hidden" Keeping track of the affective domain, unintentional learning and changes in values and attitudes is always challenging.	Ask for feedback in writing the outcomes from your colleagues, and plan for reflection, self-reflection and monitoring techniques that can serve as a base for assessment. Observe your learners' behaviours and interactions with others and include collaborative assessments where possible (might be challenging in the asynchronous setting).

[24] Seifert (2021:6), *Students' perceptions of online teaching and learning*.
[25] Srihidayanti (2015: 260), *Teachers' Difficulties in Lesson Planning: Designing and Implementing*.

6. Questions for reflection

1. *Which part of lesson planning seems to be most challenging for you? Why? Which tools and strategies can you use as solutions?*
2. *What are the biggest differences in preparing lessons for face-to-face and online educational settings?*
3. *If you needed to list 5 tips for efficient planning for other educators, what would they be?*

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Chapter 4: Educational accountability and assessment

This chapter examines the differences and similarities of accountability and assessment in education and their applications in in-person and online educational settings. After exploring this chapter, you should be able to:

- ✓ Explain the difference between assessment, accountability, and learning outcomes,
- ✓ Give examples for nine principles of educational assessment in an online setting,
- ✓ Compare the role and use of assessment in face-to-face, online synchronous, and online asynchronous learning.

The chapter includes the following sections:

1. Defining accountability and assessment of learning outcomes
2. The role of the educator: why is it essential to raise accountability for learning?
3. How to develop educational accountability and assessment
4. Assessment in face-to-face, synchronous, and asynchronous education
5. Challenges: What if the learners don't care about your content?
6. Questions for reflection
7. References and resources

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1. Defining accountability and assessment of learning outcomes

The terms accountability and assessment accounts are often used interchangeably for different processes in education. Let’s start with the basic definitions:

Assessment is a set of initiatives one takes to monitor the results of one's actions and learning process. It is an integral part of learning and the first step in a learning cycle before feedback, reflection, and change.

Accountability is a set of initiatives taken by others to monitor and reward (or penalise) one's initiatives and actions.

Learning outcomes encompass all the results, from cognitive to affective. Cognitive outcomes traditionally include specific knowledge, skills, and competencies and answer the question: What have the learners learned that they didn't know before? On the other hand, effective outcomes focus on experiences that support learner development: How has new knowledge developed one's potential, enhanced one's value, and impacted one's relationships?

2. The role of the educator: why is it essential to raise accountability for learning?

Putting accountability for learning only on the educator leaves out a vital piece of the performance puzzle—the learners themselves.

Educators usually have more substantial incentives to raise their performance if there is no value for learners to achieve the learning outcomes. **It is essential to monitor and increase learners' motivation and hold them accountable for their learning**.

Furthermore, in the new age of hybrid learning with little face-to-face instruction and feedback to guide learning, it is vital to cultivate a culture of learner accountability in online education. If learners don't feel responsible for putting the time and effort into the online learning process, it won't reach its potential.

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3. How to develop educational accountability and assessment?

1. **Communicate clear and high expectations**: Communicating expectations is very important because it sets the criteria and motivates learners towards learning outcomes and goals. Setting ground rules at the beginning of the learning process can be a powerful moment as well. Also, expecting more from learners impacts their own self-image, and can become a self-fulfilling prophecy. Software like actiTIME and ClickUp offer a way to set and track goals online.

2. **Use methods and activities that foster self-awareness and reflection**: Learners must become conscious of their own role in the learning process. Self-awareness and reflection can be developed using one of the many activities available online. They can help with the self-assessment process, develop motivation, and take responsibility for their learning. Also, learners can provide self-assessment quickly and easily using emojis that indicate how well they understood the lesson.

3. **Use active learning techniques**: Learning is not a spectator sport. Engaging learners with questions, discussions, peer-to-peer learning, and non-formal methods is necessary for their learning process. Exploring and using various features of learning platforms like Moodle, or tools like Zoom can be a great place to start.

4. **Offer diverse learning content**: While planning out a lesson or a course, it is essential to include a wide range of activities that will offer a way for learners to excel with various talents: theory, practical activities, and activities that assist learners in real-world activities, places for discussion and connection with others, etc. Also, learning content should change depending on the most effective way to teach various subjects. Learning platforms such as EdApp or Google Clasroom can help make varied content that will offer a myriad of ways for self-assessment.

5. **Give Feedback**: Effective and prompt feedback heightens learners' motivation and helps them develop their self-assessment methods. It is helpful to have varied and frequent feedback and have ungraded practice activities with clear criteria that help learners develop their own criteria while keeping in mind that feedback is not testing. Using online tools that provide instant feedback and comparison, such as Kahoot and Google Forms, can be a fun and easy way to engage learners.

6. **Model the learning process**: Educators should be open about their own experiences and self-assessment methods. Also, they should ask for feedback from learners and show how they use it for assessment and development.

7. **Assist before giving correction**: Poorer performing learners or those whose self-assessment is poor should receive help and guidance towards improvement.

Nine Principles of Good Practice for Educational Assessment *(AAHSE Assessment Forum, 1992)*

	Principle	Online setting application
1	The learning assessment begins with educational values.	• Choosing and imparting the importance of digital tools that offer digital safety • Taking care to include learners with difficulties and provide alternative ways to contribute using digital tools such as forums, chat, video, etc.
2	Assessment is most effective when it reflects an understanding of learning as multidimensional, integrated and revealed in performance over time.	• Visual and transparent tracking of progress towards a learning goal through digital apps like Toodledo and ClickUp • Setting tasks for offline, in-world work • Giving effective feedback (recap our chapter on Feedback for tips!)
3	Assessment works best when the programs it seeks to improve have clear, explicitly stated purposes.	• A clear and always accessible list of expectations and learning goals in the course/lesson overview
4	Assessment requires attention to outcomes and the experiences that lead to those outcomes.	• Creating a safe environment that fosters communication, feedback, and choice
5	Assessment works best when ongoing, not episodic.	• Multiple chances for assessment that are not always graded through tools like Kahoot or Google Forms • Introduce a reflective practice that will follow your learners through the program, like journaling or making short reflective paragraphs on platforms like Padlet.
6	Assessment fosters broader improvement when representatives from the educational community are involved.	• Offering a myriad of learning materials, including existing platforms like Khan Academy, TedEd, or even Youtube
7	Assessment makes a difference when it illuminates questions people care for.	• Post polls on Mentimeter. You can also post questions for discussion on forums or messaging boards (Boardhost) if they deal with complex queries
8	Assessment is most likely to improve when it is part of a more extensive set of conditions that promote change.	• Present the primary goal of your education program at the beginning, and post it in a visible place in your learning environment or materials • Keep in mind that Maslow comes before Bloom!
9	Through assessment, educators meet their responsibilities to learners and the public.	• Make a way to present the work of your learners to the world. Motivate them to engage with the world through posting their achievements online or making them available to the broader public!

4. Assessment in face-to-face, synchronous, and asynchronous education

Face-to-face education	Synchronous education	Asynchronous education
Encouraging learners' responsibility and self-assessment can be developed at any stage. You can check the progress by asking simple questions, checking the learner's work, or fostering discussion. You can remind your learners of their progress by overviewing their work and one-on-one sessions.	Your role is more than that of a facilitator of a learning process. Synchronous education is similar to face-to-face education concerning developing learners' self-assessment, with the chance to use assignments for self-driven learning, with feedback and reflection during online work. Group work and tasks that motivate them to take the topic to the offline world are powerful ways to encourage learners to take responsibility. Setting up "office hours" when learners can reach you is also very beneficial, as well as developing a couple of evaluation tools that learners can use for themselves and reflect on your online sessions.	Your role is that of a learning environment designer. This kind of education puts the most emphasis on an individual's drive, and the task of the educator is to set up an environment that drives self-assessment and gives plenty of chances for feedback to the learners. Read the nine principles and their online application and remember that more is not always better! While designing an education program, choose a way of feedback and self-assessment tools that are in line with your learning outcomes and goals. If you are focused on knowledge, include tests, quizzes, and a ranking system learners can use to see their progress towards the learning outcome. If you are focused on skills, use practical assignments with questions for reflection.

5. CHALLENGES: What if the learners don’t care about your content?

The biggest challenge of online education assessment is the participants’ silence. There is less incentive for the participants to show up in an online setting, and even then, they can be there without engaging or giving any kind of feedback or self-assessment. The role of the educator becomes more prominent, and it is hard to shift that responsibility back to the learners. **The educator creates the learning environment to lead the learner, but there is no guarantee that the learner will use it.**

It is best to incorporate using self-assessment tools into the education program itself. Introduce the self-assessment system at the beginning of your schedule, and take time to explain it to the learners. Oversee their first assignment, if possible.

Make it hard to skip the self-assessment parts. Put the quiz in the middle of the video. Create a forum and think about interesting questions to engage participation. Make that self-assessment task a peer review assignment. Also, keep it short, and introduce layers. Ask them one multiple answer question, and then ask them to elaborate. Nudge them to discuss their answer on a messaging board for the motivated ones.

Use the learner’s ego, make it about them. Let them design their SWOT analysis or learning plan. Map their hero journey towards learning goals with avatars of their own choosing.

Reward your learners! Give them badges, colour their names in fancy colours, give them titles depending on the level of engagement—issue fancy letters of recommendation or diplomas. Be creative!

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6. Questions for reflection

1. *What parts of your learning materials could you design for peer-to-peer, and what for self-assessment?*

2. *Think about the self-assessment criteria you want to use. How would you make sure that your learners understand them?*

3. *Create a self-assesment plan for an asynchronous setting and test it on a colleague. Write down their feedback and revise.*

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Chapter 5: Assigning and creating self-study materials

This chapter deals with the features and the application of self-study materials in in-person and online educational settings. After reading the chapter, you should be able to:

- ✓ Explain the main features of self-study materials,
- ✓ Describe the process of assigning and creating self-study materials,
- ✓ Compare the use of self-study materials in face-to-face, online synchronous, and online asynchronous learning.

The chapter includes the following sections:

1. Self-studying, self-motivating, self-learning: what are the main differences?
2. The role of the educator in assigning and creating self-study materials
3. A step-by-step guide for creating self-study materials
4. Self-study materials in face-to-face, online synchronous, and online asynchronous education
5. Challenges: your learners do not use the materials you've created
6. Questions for reflection
7. References and resources

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1. Self-studying, self-motivating, self-learning: what are the main differences?

At some point in our lives, we have all been self-studying. And you most probably remember the feeling of preparing for the test: highlighting, sketching, trying to memorise as much as you can. All of that from the comfort of your own space, wearing comfortable clothes and fuzzy socks with your favourite drink by your side, books and articles spread around the kitchen table - or wearing headphones in the library. **Now, as a digital educator, you are aware that the success and effectiveness of distance learning largely depend on the quality of the study materials you and your learners use.** You might wonder how to assign, create, or encourage your learners to design and follow self-study materials and get the most of them.

We define **self-studying** as a learning method where one is **learning about a subject at their own pace without direct supervision or attendance in a class**. In other words, self-studying allows learners to understand what they want when they want, and how they want it—following or creating any material that our learners use while self-studying is called **self-study material**. While textbooks and articles present information in a compact knowledge form and are often closer to reference material, **self-study materials are the instrument of learning**. What does it mean?

Relevant research[26] suggests that self-study materials support the learning process because they are:

1.) Self-motivating: They foster curiosity, raise problems, and relate knowledge to familiar situations and previous knowledge and experiences making the learning meaningful.

2.) Self-learning: They provide learners with directions, hints, references, and bites of information to facilitate independent learning. Also, to make the content understandable, self-study material is supported by simple explanations, examples, illustrations, activities, etc.

3.) Self-explanatory: the learner can go through the material without external support. The content should be analysed logically and presented in a self-explanatory and conceptually straightforward.

4.) Self-contained: regardless of distance learning amid pandemics, self-study material should be self-sufficient for the learners who are not able to receive support due to their geographical, physical, and psychological isolation.

5.) Self-directed: the study material should provide learners with necessary guidance at each stage of learning in a role of a distant educator who can guide, instruct, moderate, and regulate the learning process, even online.

[26] Jayaram and Dorababu (2015), *Self-learning materials in distance education system*.

6.) Self-evaluating: To ensure optimum learning, the learners should know whether they are on the right track. Self-evaluation in the form of self-check questions, activities, exercises, etc., provides the learners with much-needed feedback about their progress, reinforces learning, and motivates them for further learning.

What are the advantages and disadvantages of creating self-study materials?

As self-study materials are self-motivating, self-learning, self-explanatory, self-contained, self-directed, and self-evaluating, the **major benefit is the active role of learners and significant responsibility for the process of learning**. On the other hand, as learning is happening independently of an educator, **some learners can feel isolated or lose motivation to follow the materials**. You can explore further differences below[27].

Advantages of self-study materials:

- learners are active rather than passive in the learning process,
- learners control the pace of learning,
- learners can explore materials on their own because they are self-learning and independent of the educator,
- learners control the time and interval of learning – the content is available when learners want it,
- content is tightly organised,
- learners are responsible for their learning,
- repetition of content material is possible,
- learners can skip familiar information and concepts,
- the frame format of documenting material content and sequence facilitates peer review,
- module documentation can be treated as creative works and scholarly publications by the academe, much as chapters in a book,
- materials are exportable for use at home or sharing with other institutions.

On the other hand, the **disadvantages of self-study materials** are:

- some learners can feel isolated,
- self-study materials can make it more difficult to emotionally motivate learners,
- it is harder to show attitudes about the content,
- immediate feedback or question periods may not be available.

[27] Minnick (1989), *A Guide to Creating Self Learning Materials.*

2. The role of the educator in assigning and creating self-study materials

Here, the role of the educator changes from traditional (a broadcaster of information, a performer, an entertainer) to a more innovative one that aligns with digital education. This does not mean that the learners do not need the educator, but that the **responsibilities for the learning process put the focus on learners themselves**.

To use the advantages of self-study materials and to achieve an active role for learners, the educator should be a **manager and a facilitator, equipped with different skills**. By creating self-study materials, educators **teach learners how to teach themselves,** and re-allocate the responsibility of learning to the learners – from dependent to independent.

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3. A step-by-step guide for creating self-study materials

We have seen the description of self-study materials, their advantages, and disadvantages, and defined the role of an educator in assigning and creating self-study materials. Now, let's explore the process of designing self-study materials, step by step. Available expert resources suggest the following steps[28]:

1) Define the access devices

Even though self-studying happens without the presence of an educator, access devices are helping you, the course creator, to come as close to your learner as you possibly can, and the learner to come as close to the content as they can. This makes the content more intimate and provides a substitute for a live educator. The main access devices are:

- **Cover page** – identify a suitable and attractive cover design for the course as the cover page also communicates a broader view of the course to the learner.
- **Title of the unit** – the appropriate title of the unit gives a clear idea about the content of the unit. Try to be as specific about the title so that your learners understand it clearly.
- **Structure of the unit** – the structure provides the road map of the unit as it contains main sections, sub-sections, and sub-sub-sections of the content. The structure shows what the learners are expected to learn to meet the objectives and shifts their attention towards the subject matter.
- **Objectives** – list observable and measurable objectives of the unit.
- **Division of the content** – indicate each section distinctly by **BOLD CAPITALS** and each sub-section in **smaller bold letters**.
- **Illustrations** – support the content with different illustrations, diagrams, charts, graphs, and photographs to make the course visually engaging and appealing.
- **Glossary** – create a glossary of keywords, new concepts, and technical expressions relevant to the content, preferably after the summary of the course.
- **Instructions** – precise instructions as to how to go through the unit, guide your learners.

2) Develop the unit – beginning, the main body of the unit, ending of the unit

Self-studying materials should be effective without the direct support of an educator. Developing the unit is important because we have to integrate the role of the educator into its content.

- **Beginning of the unit** (be clear and decisive on how your learners should approach the unit and guide them through what to expect from the unit):

  a) Structure of the unit – online self-studying materials do not have just one table of contents. The list of the content applies to every unit itself. The list of learning

[28] Chaudhary (2005); Jayaram and Dorababu (2015)

items is called the structure. With the help of clearly defined and arranged sections, sub-sections, and sub-sub-sections, the material is more learner-friendly and easy to follow.

b) Introduction to the unit – you need to welcome and motivate your learners in the introduction. Giving the learners the impression that what they are going to study is easy and manageable, encourages them to interact with the content.

c) Defining the objectives – objectives help us describe what a learner should be able to do after going through the unit. Defining the objectives is important because we need to identify the outcomes of instruction in terms of observable performance of learners – in pedagogy, we call them learning outcomes.

- **The main body of the unit** (main body is a place where your most important content is at home. It consists of a sequence of materials explaining a topic, self-assessment questions, exercises, and different activities):

  a) Small steps – divide the content into small manageable learning steps making it easier for the learner to move from one step to another.

  b) Logical arrangement – arrange the content logically so that the learners can proceed from one learning point to another like they are climbing the stairs. State the learning points in the unit clearly and link them with others that follow them. This way, the content has continuity and consistency.

  c) Order the content for optimal learning – from known to unknown (link the unit with the entry behaviour or previous learner's experiences to make the learning meaningfully connected with things they already know), from concrete to abstract (start with concrete information and gradually introduce the abstractions using illustrations, demonstrations), from particular to general (discuss a few particular cases before generalising it into wider concepts), from actual to representative (describe the actual objects or events, use charts, graphs or diagrams if needed).

  d) Use a personalised style – write in simple, plain, and clear language. Address the learners by 'you', and by their names, to create a feeling of being paid individual attention. Self-study material should give learners a feeling that he/she/they are being taught by an educator even though the educator is not physically present in the room. Make writing personal and interactive to influence the attention and interest, use personal pronouns, adequate humour, and illustrations.

  e) **Assess** – include in-text questions that include self-check questions, progress checks, exercises, activities, and assignment questions to reinforce learning and provide feedback.

- **Ending of the unit** (ending of the unit should contain a summary, a glossary, and suggested literature for further reading).

4. Self-study materials in face-to-face, online synchronous, and online asynchronous education

Face-to-face education	Synchronous education	Asynchronous education
In face-to-face education, self-learning materials are mostly used for homework, extra reading, or for those learners who want to know/do more. When introducing the materials, it is important to explain their use, the way the assessment will be done (if any!), and to demonstrate them to the learners. You can also monitor your learners by asking about their progress in each session and going over their progress together.	Synchronous education is similar to face-to-face education but does ask for a **more structured approach**. It is important to store self-study materials in an accessible format like Open Office or Adobe Acrobat .pdf. Not everyone has Windows! When introducing the materials to learners, take your time to make sure everyone downloaded them or accessed them successfully. Explain the use to everyone and demonstrate by sharing your screen. You can also put learners in groups by breakout room option and give them time to go over materials together and come back with any questions they have about them.	In asynchronous education**, every material is self-study material.** Pay special attention to the materials for asynchronous courses where the focus is on building a community. They have to encourage the learners to interact and engage with the group. Keep in mind the importance of testing your lesson or course so you make sure everything works as it should.

5. Challenges: your learners do not use the materials you've created

Creating self-study materials is a time-consuming process. It is not easy to summarize the content, make it readable and coherent for an online environment. The frustration can become bigger if you notice that your learners are not using it at all. There is a couple of solutions to consider.

1.) **Go visual!** Plain bunch of text can sometimes be boring. Foster your creativity with free online platforms like Canva. You can easily (and for free!) create engaging materials, use different styles and figures.
2.) **Use storytelling and be authentic.** Address the learners by 'you' to create a feeling of being paid individual attention. Make writing personal and interactive to influence the attention and interest, use personal pronouns, adequate humour, and illustrations.
3.) **Share responsibility**. Encourage your learners to create their own self-study materials. Especially if you are using self-study materials in a face-to-face education, your learners can individually create different parts of a unit, share their work with their peers and stimulate peer-to-peer learning.

6. Questions for reflection

1. Try to come up with one advantage and one disadvantage of self-study materials according to your personal experience of self-studying!

2. List and reflect on the most important skills the educators need to assign and create self-study materials for their learners.

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7. References and resources

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Maphosa, C., Bhebhe, S. and Rugube, T. (2019). Interrogating the Art of Developing Self-learning Material for Open and Distance Learning (ODL) Students. *International Journal of Innovative Research and Development*, 8 (6): 191-199.

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Chapter 6: Recognising and handling group dynamics

This chapter examines the five stages of group dynamics and the way to use the concept for managing and motivating learners in both in-person and online educational settings. After exploring this chapter, you should be able to:

- ✓ Explain the role of group dynamics in the digital classroom,
- ✓ Identify the main causes of negative group dynamics in online learning,
- ✓ Describe the stages of group dynamics and possible problems at each stage,
- ✓ Compare group dynamics in face-to-face and online learning environments.

This chapter includes the following sections:

1. *Group dynamics in educational settings – definition and importance*
2. *The role of the educator in supporting groups of learners*
3. *The dos and don'ts of online communication – Netiquette and its importance for group dynamics*
4. *Group dynamics in face-to-face, synchronous, and asynchronous education*
5. *Challenges and how to overcome them*
6. *Questions for reflection*
7. *References and resources*

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1. Group dynamics in educational settings – definition and importance

Defining the concept

Educators agree that one of the most challenging aspects of facilitating the learning process in both traditional and virtual environments is dealing with the group dynamics.

The term “group dynamics” belongs to the social psychologist Kurt Lewin. In the early 1940s, Lewin noticed that when working in groups, people often take on distinct roles and behaviours. The concept of “group dynamics” describes how different roles and behaviours influence people in the group.

In an educational setting, we use the group dynamics concept to look into the relationships between the learners in a group and how these relationships impact the effectiveness and efficiency of the group as a whole.

The importance of group dynamics – Why should you study group dynamics?

It is easy to recognise the positive dynamics in the group. Usually, it’s obvious – team members trust one another, they share problem-solving and decision-making, and they hold one another accountable for keeping the agreement. Research showed that when a group has a positive dynamic, it creates a pre-condition for group members to be more open and responsive to learning.

In contrast – in a group with poor group dynamics, people have difficulty in opening up, and the cooperation level is very low. Group members could spend a lot of time arguing but decisions wouldn’t be made. In a group with poor group dynamics, learners don’t feel safe, and they don’t trust educators, nor do they feel free to share their opinion and experiences that lead to better cooperation. Educators, learners, and team members can all be the source of a negative group dynamic. Some of the most common challenges that could occur are:

- **Weak leadership:** a more dominant member of the group takes charge, which leads to a lack of direction and focus.
- **Excessive deference to authority:** members hold back on their real opinions because they want to be seen as agreeing with the leader.
- **Blocking**: team members disrupt the flow of information in different ways (e.g., they are too critical, or refuse to participate)

Bruce Tuckman’s theory of stages of group development can help you to pre-empt problems that could arise and support the group to move from stage to stage.
If instead of reading the text you prefer video presentation, watch the five stages of group development as told by the fellowship of the Ring or from the movie Remember the Titans.

Five Stages of Group Development

1. Forming[29]

The first few days or weeks when learners come together and form the group is called the Forming stage. At this stage, learners are mostly interested in getting to know each other and figuring out relationship dynamics inside the group. This stage is known as the polite stage, when group members are avoiding serious conversations or critical remarks. Learners are excited, anxious, and a little bit cautious of one another. During this stage, group members tend to avoid conflict, they are rather reserved with their behaviour and feel ambiguous as they try to assimilate within the group.

Observable Behaviours	• Politeness • Tentative joining • Orienting with others personally • Avoiding controversy • Cliques may form • Need for safety and approval • Attempts to define tasks, processes • Discussion of problems not relevant to the task
Feelings and Thoughts	• Many feel excited, optimistic, and full of anticipation • Others may feel suspicious, fearful, and anxious working with others • Question - “What is expected of me”? • Uncertainty and Apprehension
Group Needs	• Team mission and vision • Establishing specific objectives and tasks • Identify roles and responsibilities of team members • Establish team ground rules • Team member expectations • Operational guidelines for team • Effective in-class meetings • Effective Chat meetings
Leadership Required	• Taking the “lead” • Being highly visible • Facilitating introductions • Allow for get-acquainted time • Providing the “big picture” • Establishing clear expectations • Provide structure and task direction • Create an atmosphere of confidence and optimism • Encouraging Active involvement • Communicating success criteria

[29] Taken and adapted from: https://www.wcupa.edu/coral/tuckmanStagesGroupDelvelopment.aspx

Practical tips for helping your group in the Forming stage:

- **Establish early communication**. The learners need to perceive the educator's presence as soon as the course begins.
- **Develop a positive social atmosphere**. Get to know the learners' names and interests and be open to telling them a bit about yourself. Use different icebreakers at the beginning of the program, for example, Common points or You can leave your hat on to help learners to get to know each other better. For more ideas check on our website Trainer's Toolkit. For additional information on "getting to know each other" activities and name games check out special icebreakers, and special online Team Bonding exercises.
- **Reinforce predictable patterns of communication and action**. The learners need structured activity, repetition, and feedback. Without these, the learners will get the impression that the educator does not care about the course or the students, making the development of trust unlikely.
    - Be available for office hours.
    - Take a few minutes before and after class to interact with students.
- **Involve team members in tasks** such as group projects or activities that require learners to rely on each other to complete them. Have students create their own goals for the class.
- **Establish ground rules – create netiquette** (more in the next section).

2. Storming[30]

From the name of this stage, it is obvious that interpersonal tension and conflicts can arise. After the "quiet and calm" forming stage, it is natural to have competition and confrontation between learners. If this stage is not managed properly, resentment and hostility could take place.
The reason for possible negativity in the group can be the members' desire to express their opinion and show their individuality. Learners could react emotionally when they disagree with the stated opinion or the given task. At this stage cooperation and teamwork is extremely difficult and it seems like the group is moving backwards and regressing. Keep in mind that the group is actually developing and moving forward to the next stage of group development.

[30] Taken and adapted from: https://www.wcupa.edu/coral/tuckmanStagesGroupDelvelopment.aspx

Observable Behaviours	• Some resistance • Arguing among members • Desire for leadership • Differences in points of view and personal styles are evident • Lack of role clarity • Lack of participation • Power struggles and clashes • Lack of consensus-seeking behaviours • Lack of progress • Establishment of unrealistic goals • Concern over excessive work • Competition
Feelings and Thoughts	• Defensiveness • Confusion, and loss of interest can result • Resistance to tasks • Fluctuations in attitude about the team • Unsure if I agree with the team's mission and purpose • Questioning the wisdom of team members • Increase in tension and jealousy • Unsure about my freedom and ability to influence • We're not getting anywhere
Group Needs	• Inter and intrapersonal relationships • Identify personal differences • Effective listening • Giving and receiving feedback • Conflict resolution • Clarify and understand the team's purpose • Re-establish roles and ground rules • How to deal with those team members who are violating team codes of conduct • Receiving feedback from the educator
Leadership Required	• Requesting and encouraging feedback • Educators acknowledge a conflict • Educators suggest that consensus is required among group members • Get members to assume more task responsibility • Concept of shared leadership emerges • Identifying issues and facilitating their resolutions • Teach conflict resolution methods • Offer support and praise • Building trust by honouring commitments • Actively involved group members begin consulting one another – shared leadership emerging but have difficulty with decision making

According to Bruce Tuckman, the storming stage is crucial for the development of the group, and it is an opportunity for the group members to practice patience and tolerance. Your major role as an educator is to help group members to learn how to resolve conflicts constructively.

Practical Tips

Dealing with conflicts – one possible challenge in this stage is to overcome tension and conflicts in the digital learning environment. Possible ways to deal with conflicts are:

- **Set clear expectations and group norms** for discussions. One of the reasons for conflicts is unclear expectations and not well-defined and commonly agreed on rules.
- **Pay attention to the topics** that can be more **sensitive to the group members**. Think in advance about how you might structure a controversial or sensitive discussion and prepare for the possibility of conflict.

- If there is an **unexpected conflict**, you could take the following steps:
  - **Debrief** with students after the conflict by sending a summary of the conversation, addressing the learners' feelings as well as addressing misconceptions.
  - Consider using **reflection** as a short assignment to encourage learners to examine their beliefs and how the conflict may have changed their thinking on the topic.

  One serious challenge that educators face at this stage is the uncertainty of how to read, and how to recognise the signs of coming conflict in an online setting without being in the same space with the group members.
  - If you are leading an online synchronous class, you may very well be able to recognise some physical or vocal cues if learners are becoming uncomfortable.
  - Pay attention to tone in written communication. Tension may arise when students use more emotion-focused words.

- **If learners challenge your authority:**

- Know that it is normal for this stage and stay positive.
- Pay attention to your emotional reactions to feelings of being threatened or challenged.
- Be aware of your body language and what you communicate through your actions.
- Address behaviours, not people.
- Uphold class norms and netiquette. Address issues that arise every time and remain consistent in how you deal with learners. Refer to your class/group guidelines.
- Approach learners and talk to them privately.

Check out the Trainers' Toolkit to find activities for digital classrooms that might help you in guiding your learners through group development stages.

3. Norming[31]

This stage is sometimes called the **accommodation** stage. Group members know each other well and create new ways of interacting with each other. If at the Forming and Storming stages the main concern was building relationships and finding one's place and role, at this stage, the members start working toward the success of the group's goals. As the group matures, leadership changes from one teammate in charge to shared leadership. For shared leadership to be effective, group members learn that they have to trust one another.

Observable Behaviours	• Processes and Procedures are agreed upon • Comfortable with relationships • Focus and energy on the task • Effective conflict resolution skills • Sincere attempt to make consensual decisions • Balanced influence, shared problem-solving • Develop team routines • Sets and achieves task milestones
Feelings and Thoughts	• Sense of belonging to a team • Confidence is high • Team members feel a new ability to express criticism constructively • Acceptance of all members of the team • General sense of trust • Assured that everything is going to work out okay • Freedom to express and contribute.
Group Needs	• Develop a decision-making process • Be prepared to offer ideas and suggestions • Problem-solving is shared • Team members take responsibility for shared leadership skills • Receiving feedback from educators
Leadership Required	• Requesting and encouraging feedback • Shared leadership • Give feedback and support from Educators • Allow for less structure • Promotes team interaction • Asks for contributions from all team members • Collaboration becomes clearer • Encouraging others in making decisions • Continues to build strong relationships

[31] Taken and adapted from: https://www.wcupa.edu/coral/tuckmanStagesGroupDelvelopment.aspx

At the Norming stage, the team members freely share their feelings and ideas, give and get feedback to and from one another, and discuss different ways of accomplishing the task. Creativity, as well as a sense of belonging, is high. Collaboration emerges during this stage when the teamwork ethic and shared leadership are understood.

Practical Tips:

- **Build Team Spirit.** Use virtual team-building activities, group games, challenges and exercises via platforms like **Zoom**, **Microsoft Teams** and **Google Meet**. Remember, having fun is important for team spirit. Examples of activity types include icebreaker questions, virtual campfires, and group fitness classes. The purpose of these **virtual activities** is to build relationships, improve communication, and boost motivation.

- **Team self-assessment.** For team development, self-assessment is an essential step. It can provide space for constructive conversations. Look into this team development activity that can help you to guide your group through a structured discussion. Discussion is built around six different areas. You could use the learnings from this activity to further strengthen the group, resolve the issues and help the group to move from the Norming to the Performing stage.

4. Performing [32]

At this stage of group development, the team's mission becomes the priority, and the team makes significant progress towards defined goals. At the performing stage, team members feel comfortable with each other, and interdependence becomes a norm. This is a highly productive stage for the team.

Observable behaviours	• Fully functional teams • Roles are more explicit • Team develops independence • The team can organise itself • Flexible members function well individually, in subgroups or as a team • Better understand each other's strengths and weaknesses and insights into group processes
Feelings and thoughts	• Empathy for one another • High commitment • Begin understanding collaborative work ethic • Fun and excitement • Lots of personal development and creativity • General sense of satisfaction • Continual discovery of how to sustain enthusiasm

[32] Taken and adapted from: https://www.wcupa.edu/coral/tuckmanStagesGroupDelvelopment.aspx

Group needs	• Leaders assure team is moving in a collaborative direction • Maintain team flexibility • Measure knowledge performance – Post-test • Provide information • Giving and receiving feedback
Leadership required	• Shared leadership being practised • Observing, inquiring and fulfilling team needs • Collaborative efforts among team members • Educators provide little direction • Team members offer positive reinforcement and support • Share new information

In the Performing stage, the group has **established norms**, most interpersonal issues are solved, and the group's attention shifts to the tasks. Group members are motivated to work together as a team and through experience know how to solve arising in the group disagreements. Learners at this stage of group development are focused on accomplishing educational goals.

As an educator, your role in the Performing stage changes from managing the group dynamics to concentrating on helping learners to grow and develop in a supportive, positive way. Encourage learners to try new strategies for academic success and achievements. Be aware of the influence of external changes on group performance. For example, a change in a course schedule or group composition might put the group back into the Storming and Norming stages for a while, so by using the tools and techniques discussed in previous stages you can help the group to recover quickly and return to Performing stage.

Check out the Trainers' Toolkit to find activities for digital classrooms that might help you in guiding your learners through group development stages. In addition, look into activities from Mentoring for Success website. These activities will help your learners to cooperate to achieve their goals.

5. Adjourning [33]

This is the final stage of group development. Team members are preparing to say goodbye and leave. During the last week of the class, there will be significant changes to the team structure, goal, or purpose within the team. Learners will experience change and transition. Because of this, the main goal of the adjourning stage is to help team members to process their emotions, achieve closure and prepare for departure on a positive note.

[33] Taken and adapted from: https://www.wcupa.edu/coral/tuckmanStagesGroupDelvelopment.aspx

Observable Behaviours	• Visible signs of grief • Momentum slows down • Restless behaviour • Bursts of extreme energy usually followed by a lack of energy
Feelings and Thoughts	• Sadness • Humour • Glad that is over – relief
Group Needs	• Evaluate the efforts of the team • Tie up loose ends and tasks • Recognize and reward team efforts
Leadership required	• Leaders help the team develop options for termination • Good listening • Reflection and carry forth collaborative learning to the next opportunity

Your role as an educator at this stage is to create a space where learners can:

- Reflect on their growth and engagement.
- Receive individual and group recognition of the progress, growth and achievements.
- Celebrate their hard work and accomplishments.

Keep in mind that the learners, who bonded and might feel sad because of the class coming to an end, might seem less motivated and even withdraw from participation. Try to choose activities for the last part of your program that can help wrap up group projects and stimulate planning a celebration to have closure, and at the same time excitement about the future. Encourage learners to stay in touch with each other and network.

There are different activities that you can use in your digital classroom to help learners go through the Adjourning stage. Even though this particular source was developed for youngsters, we are sure you can build on it and create a well-balanced plan for the last stage of the group development - 7 ideas for virtual end-of-then year activities.

2. The role of the educator in supporting groups of learners

As an educator, you need to help your learners perform well and to use the group as a source of learning, experimenting, and creativity. To accomplish this, you should change your approach within each stage.

Follow these steps to ensure that you're doing the right thing at the right time:

1. Use the descriptions above to identify which stage of development your team is currently in.
2. Consider what you need to do to move towards the performing stage. Understand your role and the ways you can help the team progress.
3. To continually understand the stage at which the group is operating, schedule regular reviews, and adjust your way of behaving, including your approach to leadership.

To learn more about Tuckman's stages of group development, check out this video ***Forming, Storming, Norming, and Performing: Bruce Tuckman's Team Stages Model Explained***

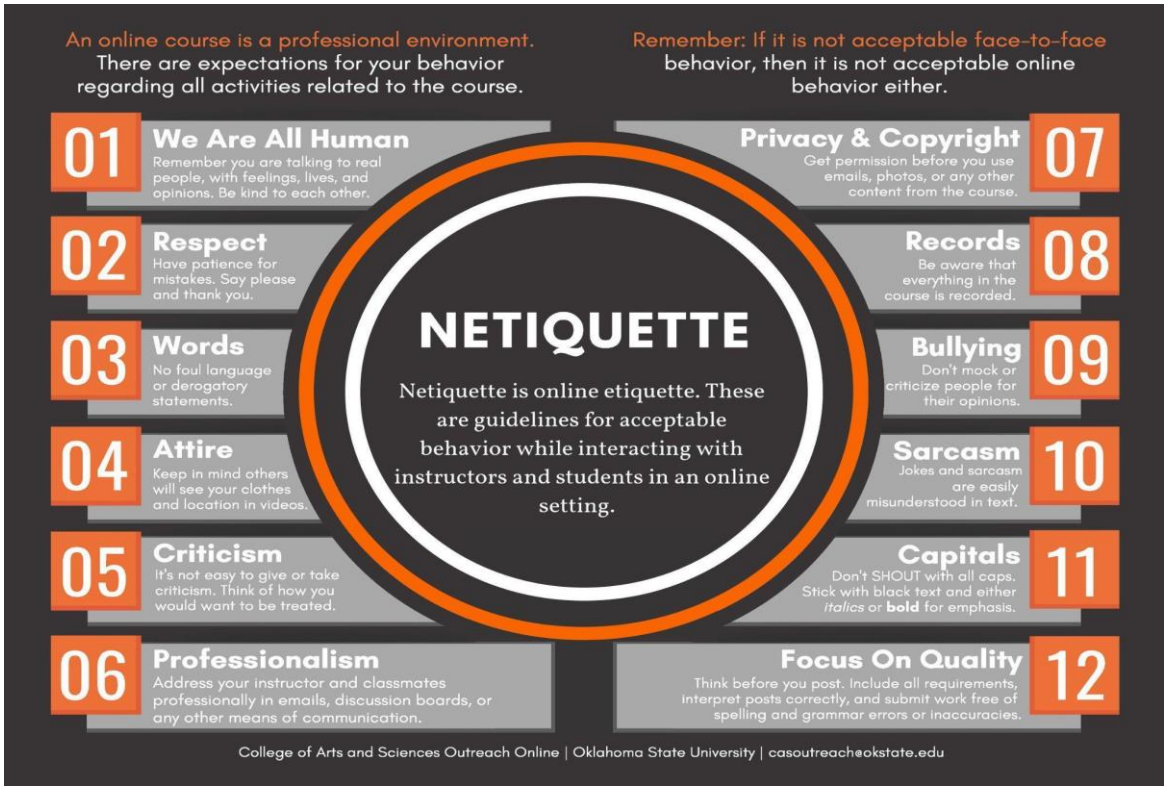
or scan this QR code

You can watch a great video tutorial about group dynamics in an online setting by clicking here.

3. The dos and don'ts of online communication – Netiquette and its importance for group dynamics [34]

The word *netiquette* was created by the combination of the words "network" and "etiquette" and it is a set of ethical rules for online communication. The concept of netiquette has emerged from the lack of visual and auditory cues in online environments, which can lead to misunderstandings. Applying netiquette can help resolve inappropriate communication and conflict, and promote safe, engaging, and collaborative group work, as well as help educators and learners to improve their soft skills.

The rules of online communication are different from the ones in person, so we cannot automatically assume our learners know them. Effective communication is vital for successful digital education, so we strongly recommend creating and agreeing on the rules of your classroom netiquette. The rules that you will choose depend on the context and environment of your class – informal or formal, on whether the learners are familiar with each other or not, and on the type of technology used in your program. Explain to the learners that noncompliance with netiquette rules can be interpreted as a sign of disrespect. Below you can see an example created by Oklahoma State University, that could be used as a model to create your version.



*Taken from: **https://cas.okstate.edu/casid/netiquette.html***

[34] Netiquette syllabus example - https://blog.citl.mun.ca/instructionalresources/tag/netiquette/

4. Group dynamics in face-to-face, synchronous, and asynchronous education

In their study "Group Dynamics in On-Line and Face-to-Face Interactions: An Experimental Study on Learning Methods" researchers Sergio Severino and Roberta Messina share very interesting observations when comparing differences in online and face-to-face interactions and give very valuable advice.[35]

Face-to-face education	Synchronous education	Asynchronous education
In face-to-face education, you have a big variety of tools to influence group dynamics in your class. Because of the close social proximity, you can better observe the group, interaction between learners, and interaction between learners and yourself; you can read their body language and make immediate interventions when needed. To understand the learners' emotional state, you could use observable behavioural indications. When the learner is in a positive state, he/she: ● Shows respect, gives help and support, gives praise ● Jokes, laughs, is relaxed and content ● Nods, approves, accepts, follows through. When the learner is in a neutral state, he/she: ● Gives ideas, indicates solutions	In online synchronous education, you can have real-time interpersonal communication, the use of natural language and immediate feedback. To understand your learners' emotional state, you could use observable behavioural indications. When the learner is in a positive state, he/she: ● Shows respect, gives help and support, praise through textual language, funny faces, appropriate images ● Jokes, uses funny faces and images that express a positive attitude ● Nods, approves and accepts through textual and funny face language. When the learner is in a neutral state, he/she: ● Gives ideas, indicates solutions through textual "question language" ● Evaluates, judges,	In an asynchronous online setting, we talk about managing group work, not classroom dynamics. Our suggestion is to look into Gilly Salmon's E-tivitis, which means "task online" – a framework for dynamic and interactive asynchronous online learning. *E-tivities* are based on intensive interaction and reflective dialogue between learners, and between learners and educators. *E-tivities* are electronically moderated by educators and are text-based. Look into this Successful E-tivities Handout & Reminders In asynchronous learning you can use discussion boards to support group dynamics through threaded discussions. The discussion board is a tool for an asynchronous environment

35 https://www.researchgate.net/publication/267219057_Group_Dynamics_in_On-Line_and_Face-to-Face_Interactions_An_Experimental_Study_on_Learning_Methods

● Evaluates, judges, analyses, interprets, expresses desire and feelings ● Informs herself, repeats, confirms, clears up, shows ● Asks for information, explanations, confirmations ● Asks for evaluations and judgements, questions, feelings ● Asks for specific directions When the learner is in a negative state, he/she: ● Refuses help, doubts, gives up, is too formal ● Asks for help, increasing tension, non-participation ● Debates, seems discouraged, depressed, and humiliated. This information can help educators to better understand the dynamic in the group and make necessary interventions. In a face-to-face educational setting, there are numerous tested methods, activities, games, and exercises to help learners to move from one stage of group development to another. For the best results in managing the group dynamic and creating a safe and encouraging learning environment, use activities that are beneficial for the particular stage that the group is currently at.	analyses, interprets, expresses desires and feelings through textual, image, funny face and "question language" ● Informs, repeats, confirms, clarifies, illustrates through posting, new topic and a link insertion ● Asks for information, explanations, confirms through post or new topic ● Asks for evaluations, judgements, questions, sentiments, and states of mind through posts or openness to new topics When the learner is in a negative state, he/she: ● Refuses help, is absent, doubts, gives up or reveals formalistic analysis through language and use of emoticons ● Asks for help, uses funny faces that express negative attitudes, is absent ● Argues, seems discouraged, depressed and humiliated through textual language, the use of emotion and images. In online synchronous education, you can use the same tips as in a face-to-face setting, you just need to adjust and modify the activities for online use. Check out the TRENDSS Trainer's Toolkit for various creative ideas!	that gives each learner a chance to post a statement and opinion as well as to respond to the other students' postings. Even though learners cannot see each other, this format gives them an opportunity to interact in the text form. For making this interaction more "humane", learners and educators could use online nonverbal communication tools, such as different fonts, different colours, emojis, symbols, etc.

5. Challenges and how to overcome them [36]

Challenge	Description	Solution
Avoiding groupthink	Individuals place views of the group ahead of their own opinion to preserve unity. Occurs during the Norming stage of group development.	Dedicate time for individual thought/brainstorming around views/ideas for a specific question/topic.
Moving off-topic	A participant brings up unrelated topics for discussion.	If it is easily answered, answer the question. If the topic is related to a later part of the program, recognize the importance of the question, answer it briefly, place it in the "waiting room" and bring it up later. If the topic is not to be addressed in your program, identify if the topic might have a related undercurrent or frustration that is causing the topic to come up. Dedicate time to address that concern individually. If not, remind the group of the appropriate topic/goal of the conversation.
Dealing with disagreement, conflict, anger, and personal attacks	**Disagreement:** Participants do not agree on the approach or next steps. Disagreement is confined to the content being discussed. **Conflict:** Deeper than a disagreement about content, conflict may be about organisational differences or a past disagreement.	**Disagreement:** Identify the source of disagreement. Facilitate a discussion about the difference in opinion or schedule a separate time to work through differences. Re-phrase the concern/frustration, ask the person to indicate if they are hearing him/her correctly, and provide an alternative or corrected frame of the concern. **Conflict:** Take a break and ask the affected participants individually about how to handle the conflict in order to move forward with the group discussion. Additional time may be scheduled to facilitate a conflict resolution exercise.

[36] Common facilitation challenges https://www.advocacyandcommunication.org/wp-content/themes/acs/docs/resources/redesigned_tools/ACS_Common_Facilitative_Challenges1.pdf

	Anger: An individual is raising his/her voice and displaying other signs of anger. **Personal attacks:** An individual personally attacks the character of another participant, someone not in the room or you personally.	**Anger/personal attacks:** Suggest a break and approach the person individually to address the issue. Remind him/her that personal attacks are breaking the "ground rules" of the group. Schedule a time for conflict resolution. In rare instances ask individuals to remove themselves and if they don't obey, use the function of automatic removal from the conference room.
Wordsmithing	The group gets focused on discussing the wording in a document (such as mission/vision) rather than coming to a consensus on the meaning of the words or moving on to other decision points.	Determine if there is an issue in clarity of terms that requires further definition to move on with decision-making or conceptual conversation or determine if the group can move forward without the discussion. If the group decides to move on from the discussion, admit the final words need to be worked out, identify this task in the "waiting room" (an ongoing list of all these topics on a whiteboard or poster) and guide the discussion back to the conceptual. Remember to build time into your agenda to address "waiting room" topics. If the group needs additional clarity on meaning, set a bounded time limit for the discussion. Write out the "definition" or ask group members what they think the definition is, and then facilitate a discussion toward consensus. At the end of the set time, if the group has not come to a consensus, ask for volunteers for a sub-group to work on the issue later. Remember to give them a bounded task and time frame to hold the discussion.
Managing side conversations	The participants are not focused on the discussion at hand. Individual conversations occur that exclude the group.	Stand near the conversing individuals to provide a hint that they are being disruptive. Ask one of the individuals if there is a question or if he/she can share thoughts because they are probably important to the entire room. Take a five-minute break and ask everyone to sit in a new seat when they come back

		(frame it as a getting to know new people exercise). Ask participants to step out if it is highly disruptive.
Knowing when to change directions and throw out your carefully planned agenda	The group is not at the place you thought the members were when you planned your agenda, or an unplanned event altered the overall approach that the group needs to take.	Take a five-minute break and discuss your change in approach with fellow facilitators. Review the decision points that you had intended on reaching during your agenda and determine which can still be reached. If an unplanned event has altered the group's goals or approach, discuss those changes with the group. You may need to dedicate more time to defining issues, clarifying items or brainstorming.
Managing time and staying flexible	Knowing when to move on to the next topic or allow a group to discuss more fully.	Create and share a timed agenda. Remind people if/when the group is close to running out of time or over time. Ask the room and get an agreement before spending more than the allotted time. "This seems to be an important conversation. Do we want to spend 15 more minutes on this?" If the discussion is breaking down barriers or will benefit future activities, it might be worthwhile to continue. When a group is spinning its wheels, bored or rehashing, it is time to move on.
Lack of engagement/ participating in discussion	Few or no volunteers to answer questions, and discussions lull. The facilitator is "pulling" information out of participants.	It may be time to take a break. Personalise the material by asking the audience specific questions. Ask for specific examples or experiences that relate to the discussion through open-ended questions.
Spotting harmful non-verbal cues	Crossed arms, attention on the phone/ computer, eye-rolling, sighs, scowling, etc.	Check in with the individual during a break. Ask if he/she has concerns or questions to identify what the sources of the cues are.
Dealing with negativity or resistance	One or two participants are very negative about the material, direction of the group or approach. They participate through negative statements and	Proper meeting preparation will help you deal with this. Working with meeting organisers in advance to understand who is in the audience, their expectations and experiences will help you develop material that is relevant to them.

	do not see how the material/content applies to them. This type of behaviour can be toxic to a successful meeting and can prevent group consensus, buy-in and/or decision-making.	If the negative participants are resistant to change, work with them individually on a break to understand what their challenges are with the material. Engage in a group exercise to brainstorm solutions. If the participant is still negative or resistant, address the issue with the meeting organiser/the participant's manager after the meeting to come up with an alternative approach to dealing with negativity prior to the next meeting.
What to do if you (the facilitator) offend someone or cross a boundary	Facilitators are not always perfect, and it is easy to overstep your boundaries or offend someone in the group. When you do cross a boundary, it is important to address the issue immediately.	Once a boundary has been crossed, it is important to acknowledge the issue and rebuild your relationship with the individual. Once you recognize a boundary might have been crossed, reach out and have an individual conversation to understand the issue as soon as possible. Reaching out and acknowledging the issue will help the individual understand that you did not mean to cross the boundary and will work to resolve the issue in the future.
The conversation does not have a natural conclusion/ decision	The group goes through brainstorming and discovery, but it is not clear what happens next to reach a desired conclusion or decision.	Identify what questions need to be answered to get to a conclusion and identify when that conversation can take place.
Making sure that every voice has been heard	Some people process information internally, while others process it verbally. It is easy for internal thinkers to get lost in the mix.	As you get to know the group and build relationships with participants, begin to identify how they process information. Check in with individuals who have not spoken, or those you know process more internally, to see if they have additional thoughts before moving on to a new topic/ agenda item. Always build a Q&A section at the end of presentations. Distribute a feedback form at the end of sessions and address items at the next meeting or between meetings.

Adaptation from the Advocacy and Communication Solutions, LLC "Common Facilitating Challenges"

6. Questions for reflection

1. *Think about groups you have been a member of. Reflect on your experience – what kind of experience have you had?*

2. *Think about one of your positive experiences. Did these groups have something in common?*

3. *Think about the groups you worked with as an educator. Which groups were easy to work with and why? Which were difficult? Which were mixed? What was the cause for these different experiences?*

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- West Chester University
- A pedagogical model for e-learning: “The five-stage model of online learning" by Gilly Salmon
- The influence of group dynamics in learning
- Instructional resources
- Creating trust in online education
- Getting Started with Managing Classroom Conflict
- Facilitating group work online

Chapter 7: Motivating techniques

This chapter dives into motivational theories and techniques used in face-to-face and online educational settings. After exploring this chapter, you should be able to:

- ✓ Explain the importance and benefits of motivation in education,
- ✓ Identify your participants' learning styles and motivation,
- ✓ Select appropriate online tools to engage and motivate all types of learners in your educational courses.

The chapter includes the following sections:

1. What is motivation and why does our life depend on it?
2. Motivational theories and how to apply them – the role of the educator
3. Practical advice and tips – how to involve and motivate learners with different learning styles
4. Motivation in face-to-face, online synchronous, and asynchronous learning
5. Challenges: what if your learners are not motivated?
6. Questions for reflection
7. References and resources

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1. What is motivation and why does our life depend on it?

Motivation, as the name suggests, is what 'moves' us. It is the reason we do anything at all. No surprise that an entire body of literature has sprung up around it – different theories, different understanding, different approaches.

Why do we do the things we do? What drives our behaviour? What motivates us and what does it mean?

Simply stated, motivation is what people **WANT** to do, **CHOOSE** to do, and **COMMIT** to do. Motivation is "*the WHY*" that makes people do what they do. It is "*the WHY"* that makes people choose an object or a goal over another and forego something pleasurable to pursue their object of desire.

Motivation is not only important on its own: it is also an important predictor of learning and achievement. Learners who are more motivated to learn persist longer, produce higher quality effort, learn more deeply, and perform better in the learning environment and generally in life.

We as educators, of course, would like to have learners who immediately become interested in what we teach, and be excited, enthusiastic and curious throughout the whole program. However, if you already have any experience in digital education, you will agree that motivating learners is one of the biggest challenges in online teaching.

Before we move to the practical tips on how to motivate digital learners, let's look into the science behind the concept.

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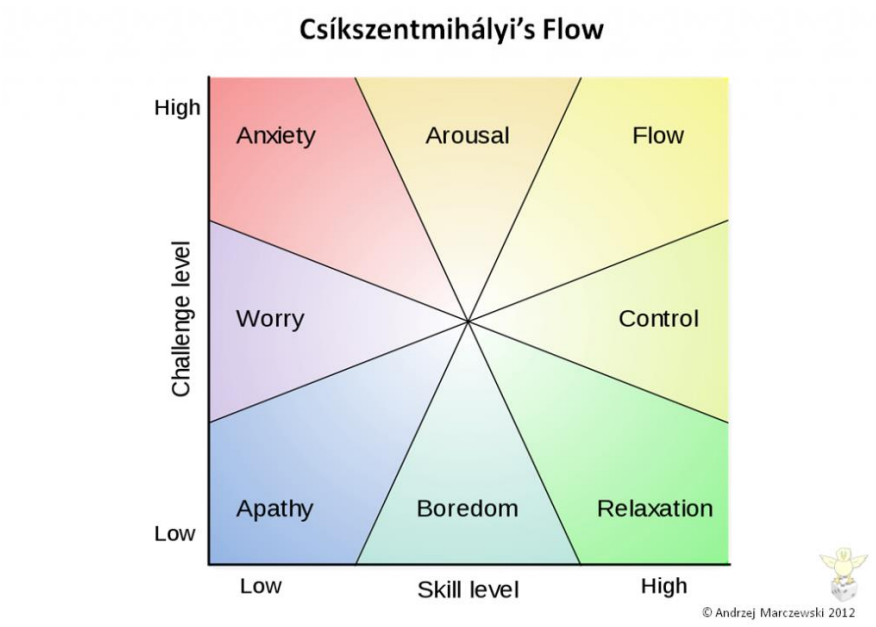
2. Motivational theories and how to apply them – the role of the educator

For creating interesting, highly engaging digital educational programs, you have to know what drives, what motivates people. Psychologists and scientists have developed several theories to help explain the way the human mind works. Here we will present three of the most relevant ones and hope that you will apply them in creating courses that inspire and motivate people.

1. Flow Theory

Take a moment and try to remember a situation when you felt completely absorbed in something, so absorbed that you lost sense of time. Psychologists would say that you might have been experiencing a mental state called flow. When we are in the state of flow we feel a burst of energy, enjoyment, and engagement.

Being in the flow is the proven sign of **intrinsic motivation**, according to **Mihály Csíkszentmihályi**. In this moment you are totally absorbed in whatever you are doing, and all your attention is directed to the action. Time stops. You forget to sleep, eat, do everyday usual things. Creative personalities who experience this state call it "being in the zone".



In digital education you are in flow if you are fully engaged with the course and move through the program with ease and pleasure. You know and can control the pace and flow of the learning process. Our goal is to bring learners to the state of flow – it will maximize the effectiveness of educational programs. When learners are motivated, engaged, it increases level of comprehension, retention, students will recall and transfer knowledge with ease. When the process is pleasant, learners can lose themselves in the learning process and overcome challenges effortlessly.

Tips to help learners experience a state of a flow:

- **Make the task crystal clear.** Try to explain what needs to be done in detail without leaving room for doubts. Learners will be able to be efficient and enjoy the process.
- **Make sure to provide feedback.** When feedback is timely and well structured, it helps learners to learn from possible mistakes right on the spot and boosts their self-esteem and confidence.
- **Show the big picture.** Help learners to see the big picture – how different parts of the course are connected to each other.
- **Make sure that the challenge and the learner's ability is well balanced.** The flow theory states that we learn best when there is a balance between the level of difficulty of the given task and our ability level to perform this task. This is a vital point. If you get the task that is too easy for you, if it doesn't challenge you and it happens constantly, you can easily get bored and lose interest in the course all together. On the contrary, if the task is too challenging and you are not fully equipped to overcome it, your skill level is too low for this challenge, here too you can lose motivation and just give up.
- **Delegate control over the environment.** Try to create an environment where learners feel that they can influence the flow and pace of the course. It can be done by asking, consulting, involving learners in choosing the content, skipping some parts, or moving back and forth between modules.
- **Keep the content clutter free.** Try to minimize distractions, so students will not lose concentration. If a program includes too much content, too many visuals, it can interrupt the flow and cause feeling overwhelmed.

Designed by vectorjuice / Freepik

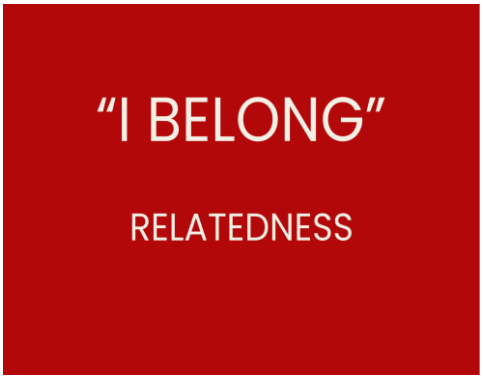
2. **Self-Determination Theory**

According to the self-determination theory people are motivated to grow and change by three universal needs – need for **competence, connection, and autonomy**. If these three needs are fulfilled, people feel motivated – they are self-determined.
If you want your learners to be motivated and engaged in the learning process, keep in mind these three psychological needs while designing your course.

Autonomy: Learners have a need to make their own choices, feel in control and act according to their own values.

Competence: Learners have a need to gain mastery, learn different skills and feel effective. When learners feel that they have necessary skills that are needed for success, they will be more motivated to participate in the educational process.

Connection or relatedness: Learners have a need to feel socially connected, valued, respected, feel that they belong.



Guidelines for using self-determination theory for motivating online learners

- To address the need for **Autonomy** digital education, keep in mind that you should provide learners with opportunities to feel that they have some control over the learning process. For this you can use following tips:

  - **Format** – provide a choice on the format of assignment – it can be essay, presentation in various ways (Power Point, Canva, Prezi) or interactive platform (Kahoot, Menti, Mural, Padlet). When learners feel that they can make a choice, they get more motivated.

  - **Content** – allow learners to choose which content from the program they want to present.

  - **Grading** – you can involve learners in discussion about how it would be better to evaluate and grade their progress.

  - **Freedom to choose the lesson** – design your program in the way that learners could choose what to learn and explore different ways of reaching learning objectives.

  - **Variety of options** – on top of the mandatory part of the program, prepare and offer optional learning modules. It gives students freedom of choice to take it or not.

  - **Open Modules** – make sure that modules you offer to your students are open and available 24/7, so they can visit and use them any time they wish.

  - **Personalized Adventure –** if you are using gamification methods, set it up in the way that learners could choose their own strategy and build their own virtual identity.

- **Competence**

  We strongly believe that it doesn't matter what we teach, one main goal is to help learners develop their competencies, because like chain reaction, it leads to confidence. When learners believe in their abilities, they start using gained knowledge for solving real-life problems. Keep in mind these few tips when designing your educational program, wether it be synchronous or asynchronous learning.

  - **Selective release**. One complaint from long-term online course learners is that they get overwhelmed by the information, content of the course. If this is a case of low motivation, you could use the selective-release option that many learning management systems have in common; it enables the educator to release content of the course not at once, but as needed.

- **Checklists**. Another proven way to help learners not to feel overwhelmed by the course material is to provide checklists so they can know what and when will be coming in the program and be ready for it.

- **Metacognitive reflection**. Using this method, you can help learners to reflect on lessons learned from previous experiences and plan ways of improvement. This method helps learners to see the bigger picture and be in control of their learning process.

- **Celebrating success**. To help learners feel more competent, and motivated, give them relatively easy assignments in the beginning of the program and gradually make them more difficult.

- **Using Feedback**. To stay motivated, learners need constant and professionally given feedback on their work. Provide learners with detailed feedback to help them overcome their shortcomings and enhance their skills. Provide feedback which will make them feel confident and encourage them to strive for excellence. Check out our blog about giving feedback in digital setting.

- **Challenging.** Keep in mind the skill level and abilities of your learners and challenge them appropriately.

- **Scaffolding (learning pattern).** This instructional method ensures that learners slowly and gradually develop their skills building on existing knowledge.

- **Show-Do model.** Simulations and guided practices are great ways to let learners practice their newly acquired skills in the safe virtual environment.

❖ **Connection and Relatedness**

The idea of relatedness is rooted in our basic need to feel connected. As eLearning designers, we should design courses that connect learners to other participants. Here are some ideas how to make your course feel more **"social":**

- **Use the word "we"** as often as possible. It will help learners to feel confidence that they belong and are on the same journey as others.

- **Use avatars** to create a sense of personal touch. Personal and course Avatars help people emotionally connect with the content and each other.

- **Include social media presence** where course participants can communicate, find like-minded learners, and develop bonds based on shared interests and experiences. For example, a FB group.

- **Use interactive tools**. Here you can find 15 interactive tools for your course that will help learners interact with people with similar goals and aspirations.

Learning Styles – our preferred way to learn and teach

As an educator, you probably heard about the theory of learning styles. Even though it is useful information, and we believe you could use it for designing your educational material and delivering the program, as a disclaimer, we want to mention that research shows nobody is strictly one type – we learn in different ways and in different situations. Check out an article in *The Atlantic* (“The Myth of Learning Styles”) which describes the theory, but also explores how learners rarely display one learning style.

Despite the different views, we decided to share information about learning styles, because experience shows that presenting material in a variety of ways motivates and engages learners better than using just one style of teaching.

One of the complaints from online learners is that most **courses are** heavy on text or lecture, and that there is a scarcity of different instructional methods. This sort of "flat" classroom may work well with verbal learners, but for students with other learning styles this approach would be very challenging. So, let’s look at what we can do to make our digital programs, online education and learning process more responsive to learning styles.

Take this test to find out your personal Learning Style from Carolina University

Here are some learning styles that we, as educators, could take in consideration when designing the course and delivering the program to be able to motivate and engage our learners (Taken from Marian University):

- **Visual:** Learners who prefer using pictures, images, and spatial understanding.
- **Aural:** Learners who prefer using sound and music.
- **Verbal:** Learners who prefer using words, both in speech and writing.
- **Physical:** Learners who prefer using their body, hands, and sense of touch.
- **Logical:** Learners who prefer using logic, reasoning, and systems.
- **Social:** Learners who prefer to learn in groups or with other people.
- **Solitary:** Learners who prefer to work alone and use self-study.

As digital educators, we can use different teaching tools within a single course so that our courses are adjusted to the various learning styles. Here are just a few examples:

- **Verbal learners** appreciate any written format,
- Recorded lectures are welcomed by **Auditory learners**,
- **Visual learners** are looking for videos or diagrams,
- **Physical learners** will strive with anything they can touch, try, experience,
- Games, quizzes, and activities are great for **logic and reasoning**,
- **Social learners** enjoy discussion boards and group projects,
- Self-reflection through journaling is enjoyed by **solitary learners.**

Every learner has personal preferences. Some people love theoretical inputs, others need real-life examples to understand a concept better, some are action-driven, and some prefer a space to sit and think about the material.
These preferences don't mean that this is the only way a person learns. Our suggestion is to make your program as diverse as possible with content and methods chosen to accommodate learners with different learning preferences.

3. Practical advice and tips – how to involve and motivate learners with different learning styles

Let's focus on three major learning styles and see what kind of tools you can use for motivating visual, auditory and kinesthetic learners.

Educational tools for visual learners

Visual learners tend to learn best through seeing. Pictures, diagrams, concept maps, symbolism, videos, and other visual presentations are just a few of the things that work well in a visual learner's education toolbox.

- **MindMapping –** A mind map is a learning tool that allows users to create and share visual representations of things like lectures, notes, and research. You can find a variety of commercial and free mind mapping software tools available. However, WiseMapping.com is a free website that allows for the creation of visually appealing mind maps directly through a web-based interface. You can use mind maps for collaboration projects – they can be shared and used by different learners simultaneously.
- **MindMesiter** – This mind mapping tool is great for people who want to be able to visualize what they're learning. *MindMeister* allows users to create, share and manage mind maps online and offline.
- **Screencasting –** Screencasting is the process of recording your computer screen while you are working on a task. Usually there will be an audio narration or on-screen text-based narration, as a short video. In online education, for visual learners, screencasting can be an excellent tool, as well as for the auditory learners if you will provide narration too. It is especially useful when you want to explain "how-to" concepts in using computer software, performing tasks on the internet, or other visually oriented tasks that can be displayed on-screen.
- **Bubbl.us** – This is a flash-based brainstorming tool that allows users to chart out thoughts, story ideas and homework. The images that can be created through this free web app will help visual learners learn productively and efficiently.
- **Visuwords** – This online graphically based dictionary is great for visual learners who want to look up the meanings of various words and concepts. *Visuwords* connects concepts and words to encourage retention.
- **TeacherTube** – *TeacherTube* works like YouTube but is dedicated to hosting instructional videos. This free site hosts videos for visual learners on nearly every topic imaginable.
- **Pics4Learning** – This free image library was designed specifically for teachers and students. It hosts thousands of images on a wide variety of topics.

Educational tools for auditory learners

The best way for auditory learners to learn is through listening. Lectures, oral presentations, music, and background sounds are just a few of the things that help auditory learners understand and retain more info. Here are some digital tools you could use to make your course adjusted to the needs of auditory learners.

- **Voki** – *Voki* is an excellent way to add audio to your program. Voki is a tool that allows you to create your own talking character which can then be imported into the classroom, blog, website, email or profile. It enables you to add audio to an announcement, assignment, or discussion. Adding sound will help the auditory learner in understanding short instructions for assignments, announcements, and discussions.
- **WavePad** – This free software can be used for sound editing (for Windows or Mac) and allows you to record and edit audio within minutes.
- **Audacity** – This easy-to-use audio editing software lets you record and edit audio. It is free to use and works across multiple platforms (Mac OS X, Windows, and GNU/LINUX.)
- **Free Audio Books** – Audio books can help auditory learners enjoy books and get through their assigned reading. You can get a list of 25 places to find free audio books right here on this site.
- **ReadPlease** – This award-winning text-to-speech software can read web pages, translate copied and pasted text to speech and perform other helpful tasks. *ReadPlease* isn't free, but it is reasonably priced.
- **NaturalReader** – Like *ReadPlease*, *NaturalReader* is designed to read text that is stored in your computer. You can get a free version of *NaturalReader* or upgrade to paid versions that have additional tools.
- **PodOmatic** – By using this site, auditory learners can create, find and share podcasts. *PodOmatic* hosts the world's largest selection of commercial-free podcasts.
- **Midomi** – This unique search engine is powered by sound, not text. You can find the music you're looking for by singing, humming, or whistling ten seconds of the tune.
- **PodcastDirectory** – This website is a great place to search for free podcasts by subject. Users can also search by country, region, city, language, and popularity level.
- **ProfCast** – *ProfCast* isn't free, but it is low-priced and incredibly valuable. Auditory learners can use this simple tool to transform PowerPoint presentations and other slides into podcasts.

Educational tools for kinesthetic learners

Best way for kinesthetic learners to learn is by doing things. Any projects, lab experiments, note-taking and other activities that allow participation and a hands-on approach are the best tools for kinesthetic learners.

- **Flashcard Exchange** – Flashcard Exchange is the world's largest flashcard library. By making flashcards, kinesthetic learners can improve their retention ability.
- **Google SketchUp** – Using this free drawing software from Google allows kinesthetic users to create, modify and share 3D models.
- **ClassMarker** – Here you can create free online quizzes (with time limits) to test knowledge of any subject.
- **SparkNotes** – The site offers free study guides, quizzes, and other interactive aids for readers.
- **Quia** – Here you can create your own educational surveys, quizzes, games, and activities. There is a subscription fee, but you are eligible for a free 30-day trial.
- **Quizlet** – Quizlet is a unique platform for helping learners get involved in the learning process. Here you can create your own flashcards and quizzes or study materials that have been made by other students.
- **Kahoot** – Kahoot! is a great quiz-based learning platform that works for hybrid learning and flipped classroom situations by making learning fun and engaging.

4. Motivation in face-to-face, synchronous, and asynchronous learning

Face-to-Face	Synchronous	Asynchronous
Face-to-face interaction offers different ways to effectively motivate learners. Being in the same physical environment provides plenty of opportunities for using appropriate methods for different learning styles, a variety of verbal and nonverbal communication tools, motivating gestures, and group dynamic techniques. It's especially relevant when we talk about the tools used for Kinesthetic learners.	In synchronous education the main challenge in motivating learners is that you are not in the same physical environment and communication channels are limited. But at the same time, it opens up new possibilities - using a huge variety of digital tools and techniques. The main thing to remember is to design a program taking into consideration the needs of all learning styles. In this case you will have something for everybody, and it will be easier to motivate and keep them engaged. So, use a variety of instructional methods – including visual, audial, and textual formats to give all learners an equal opportunity for comprehension. Give timely and sensitive feedback – when feedback is delayed, it can result in the learners' sense of isolation and may even cause some serious deviations from the course. Show your motivation and enthusiasm – only inspired people can inspire others. Even the most motivated and inspired learners lose interest in education in case they don't see the same interest in their teacher.	Because your interaction with learners is limited when you design and run an asynchronous educational course, instead of facilitating the process where you can motivate learners directly, your role here is to design the environment and include motivational tips. For example, Facebook groups where everybody can meet. This kind of education requires individual responsibility of the learner, puts the most emphasis on an individual's drive, and the task of the educator is to set up an environment that drives self-motivation. While designing the program, pay attention to the learning styles – make sure that you include a variety of methods, tools, techniques so everybody will have something for their personal taste.

5. Challenges: what if your learners are not motivated?

When discussing the challenges for the motivation of learners to be fully engaged in the learning process, there are a lot of things that can go sideways. According to the research Motivation of online learners, there are three major categories that can influence your learners motivation:

- **Internal factors** are related to the content of the educational program.
- **External factors** are related to the learning environment.
- **Personal factors** are related to the learner's personal characteristics, such as learning style or media preferences.

To overcome some of these challenges, **you can try to**:

- **Get your learners attention.** Learners are more motivated and focused when they are interested in a topic. Catch their interest with the elements of uncertainty and/or surprise. Use humour, storytelling and game-based learning elements, try unconventional methods of presenting text on the slide by secret code or upside down.
  Instead of using quiz or worksheet, invite learners to create something that could demonstrate their level of comprehension, like a flipbook, or a game, or screenshot of their work and then share their creation through the whiteboard space like Explain Everything or Google Jumboard.
  One of the best ways to keep learners' attention is to have variability in your program. Try to use an all-in-one digital tool Genially that enables users to create animated infographics, interactive presentations, different games and more.
- **Boost your learners' confidence.** When learners feel positive about their potential and achievements and believe that they can succeed, they become more confident and more motivated to try something new and learn. Help learners find a balance between effort and results by challenging experiences. One of the ways to challenge learners to think outside of the box is by various gamified experiences. Use Digital escape rooms website or Breakout EDU.
  One other way to boost confidence is to create an environment where learners can feel that their success is generally based on their own abilities and efforts, rather than on such external factors such as decisions of others. For this purpose, you can use a Digital choice board.
- **Increase learners' satisfaction**. The learners' positive feelings about their educational environment, learning experiences and personal accomplishments is directly connected with the motivation and engagement in the learning process. Increasing intrinsic satisfaction provides opportunities for learners to share their accomplishments. One of the proven ways for this is to create a digital portfolio, which they can update from time to time. Portfolio creation is a fun and creative process and a great way for personal reflection, collecting and saving projects and papers and sharing them with others.

6. Questions for reflection

1. *What is the best way for you to learn? How could you enrich your learning style?*

2. *What motivates you as a learner? What are the challenges and destructions that cause you to lose motivation?*

3. *What do you do to stay motivated and enthusiastic when teaching others? What techniques do you use for self-motivation?*

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3. How to Motivate Learners Before, During and After an eLearning Course
4. E-learning industry - how to motivate elearners
5. Motivation and Online learning
6. 10 Learning Styles for Online Education: Adaptive Learning
7. Developing Online courses for all learning styles
8. The Visual Learning style
9. 30 of the Best Educational Tools for Auditory, Visual and Kinesthetic Learners
10. Best 7 strategies to increase student motivation online
11. 5 tips to enhance motivation in eLearning
12. 4Ways to Motivate Students in the Online Learning Environment
13. 17 Tips to Motivate Adult Learners
14. Infographic - 5 musts for motivation in online learning

Chapter 8: Managing your learners' attention and energy level: energizers, warmers, coolers

The chapter examines different aspects of engagement in educational activities and provides ideas on how to manage engagement in both in-person and online educational settings. After exploring this chapter, you should be able to:

- ✓ Explain the importance of various forms of engagement,
- ✓ Give examples of managing learners' motivation and energy levels in an online setting,
- ✓ Compare managing the learners' attention and energy levels in face-to-face, online synchronous, and online asynchronous educational settings.

The chapter includes the following sections:

1. What is engagement, anyway?
2. The educator as a designer of learners' experience
3. How to manage your learners' attention and energy level
4. Motivation and engagement in face-to-face, synchronous and asynchronous education
5. Challenges: „Zoom fatigue" and what can we do about it
6. Questions for reflection
7. References and resources

Design: freepik.com

1. What is engagement, anyway?

In broad terms, engagement in an educational setting can be composed of behavioural, cognitive, affective, and social parts.

1. **Behavioral (body) engagement** can be easily seen and is often referred to as *on-task behaviour*. For example, learners are looking at the camera or making notes on *Jamboard*.

2. **Cognitive (mind) engagement** happens in learners' heads and refers to their effort to understand the material or gain new skills. It involves thinking about concepts, coding new ones, and recalling learned information.

3. **Affective (emotional) engagement** pertains to learners showing interest, curiosity, enjoyment, and a positive attitude about a task. It is also essential to think about values, personal relevance, or the importance of knowledge or skills that learners gain.

4. **Social engagement** is, simply, connections learners make to you as their educator, as well as to other learners. While not directly linked to the material and skills, it mediates the effect on the body, mind, and emotions. It can make learners more engaged, boost their self-esteem, motivate them to take accountability for their learning process, and energize them toward reaching their goals.

Do we have the attention span of a goldfish?

Generally speaking, it is quite hard to agree on the meaning of „attention span“. Are we talking about selective, alternating, or sustained attention? The main answer is: **No, we don't have the attention span of a goldfish.** That idiom rests on dubious claims and is sometimes dubbed The Goldfish Myth. Attention is very task-specific, and average attention span is simply not something that you can measure.

Short, digestible information is helpful, but **it's better to focus on offering your learners quality and informing them of possible gains clearly and upfront**. They may not have short attention spans, but they will quickly give up content they see as not worth their time in an ocean of information and online content.

To **make your learning program easily accessible**, organize the modules to take care of your learners' energy levels, impacting their ability to focus and maintain their attention in an online setting.

Using short activities such as energizers, warmers, and coolers can be a great way to grab your learners' attention and engage them with material and each other for that social element.

2. The educator as a designer of the learner's experience

As an (online) educator, it is your responsibility to **know your learners' needs, interests, and particularities**. When designing a learning environment, course, or lesson plan, it is important to balance the interests and needs of your learners. How do you get to them? You can read research on your target audience, do a survey yourself, or use evaluations to make your program better.

Once learning is in session, **your role is to monitor the engagement of your learners**. Set up clear objectives. For example, it is easy to measure behavioural signs: do they show on camera, click when asked, and type on forum…

It is important to know there is no one-size-fits-all approach. The most important thing is to ask for feedback and improve.

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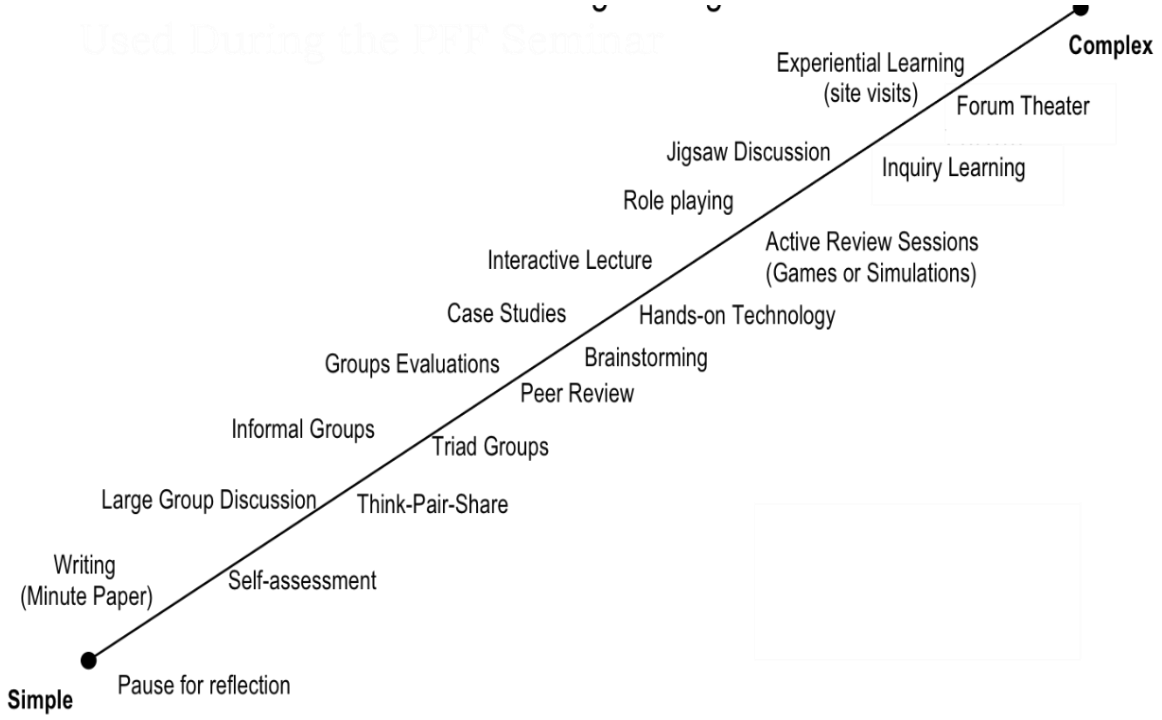
3. How to manage your learners' attention and energy level

1. **Clear goals and expectations**. Have a clear purpose and make learning outcomes clear at the beginning of the program and each session. Show your learners what knowledge they will gain and ask them about it not just for assessment purposes but also for self-reflection.

2. **Effective feedback**. Instant, task-specific feedback that includes information about the next steps learner should or can be a powerful tool for boosting engagement and educational accountability in your learners.

3. **Gamification**. Bringing some elements from gaming into education can benefit your learners and yourself. Besides boosting attention, it also leads to higher performance on practical assignments, encourages collaboration, and supports attitude and behaviour change. Provide multiple paths to the goal, give chances for failure, and „level up“ instead of „getting points“. Reward your learners with badges, certificates, and similar tokens.

4. **Active learning strategies**. They allow learners to learn by engaging with the material they are learning and gaining new skills! Active learning strategies are closely linked to learning outcomes and use learning material differently. Below you will find examples from Active learning activities arranged on a scale from simple to complex.



This is a spectrum of some active learning activities arranged by complexity and classroom time commitment.

Prepared by Chris O'Neal and Tershia Pinder-Grover, Center for Research on Learning and Teaching, University of Michigan

5. **Energizers**, **warmers**, **and coolers**. Activities that engage your students not just with the learning material but with each other, their environment, and the online setting are potent ways to keep their energy up. They are motivating and challenging, boost the social aspect of the learning environment, and offer a respite from periods that require a lot of effort. Check out our Toolkit for more ideas!

6. **Breaks**. Human beings can't sit in front of a computer screen for a whole day. Make breaks an integral part of your lessons, and point out the usefulness to your learners. Introduce shorter intervals every 45 minutes (a 10-minute break sounds ideal) and a longer one after 90 minutes (20 minutes break).

More on energizers, warmers, and coolers

Short, interactive, and engaging activities for your learners can be sorted into energizers, warmers, and coolers.

1. **Energizers** can help you keep the minds of your learners fresh and engaged, and bring the group close together. Use them after breaks, at the beginning of complex activities, or to make a transition from one activity to another. Energizers can be done with words (spoken or written), gestures, drawing, or body movement. We love using music. Check out the activity "Good morning radio" for more!

2. **Warmers** are used to bring awareness to the physical bodies of your learners, make them move, and take care of their bodies. It usually involves movement, shutting off, or moving away from the camera. You can use it as a way to relax your learners with self-massage at the end of the session or energize them after a lunch break. Check out the activities What is my body telling me or Dancing hands to start!

3. **Coolers** are activities that you can use as a finishing activity, before or after reflection. You can also use them after invigorating discussions, or heavy topics. They usually involve introspection and relaxation. Check out the activity Breathe or Warmth of the heart to get some ideas.

4. Motivation and engagement in face-to-face, synchronous, and asynchronous education

Types of engagement	Face to face education	Synchronous education	Asynchronous education
Behavioural engagement	Body language makes up more than 80% of all communication. Educators can quickly gauge the engagement with the lesson material by studying learners' body posture, eye contact, gestures, and subtle voice cues. Learning by doing or experiential learning can be organized by giving learners the ability to practice and interact with each other, solve problems in real-time, and fail and learn in a safe environment.	In video conferencing apps, only the head and shoulders are visible. Also, cues that we usually use in face-to-face context are not applicable: there is no real eye contact, and glancing out of the camera doesn't mean disinterest – your learner can be looking at their kid that just entered the room. That confuses our brain and creates an extra layer of fatigue. Instead, use direct and visible forms of feedback: ask a question, design a short poll, use chat for gathering the thoughts of your learners, and ask for reactions by using hand signs or emojis for those that have cameras off. Introduce short stretching sessions when appropriate or needed.	There is almost no way to use behavioural cues. Instead, create an environment that fosters engagement. Make it possible to react to the content by likes, hearts, or comments (Padlet does this well). Make a short poll or ask a question throughout the material and at the end.
Cognitive engagement	It is very easy to foster discussion in a face-to-face setting. Simply asking a question can alter the flow of the lesson and make learners pause and think. Group work can be done quickly, and mingling between groups is natural and can foster discussion and peer-to-peer learning. Exploration of the natural environment can be utilized by field trips, bringing materials to the workroom, or giving your learners tasks to do outside of it.	Asking questions can be a powerful tool in video conferences, and learners can answer by using their voice, by writing in chat, reacting with emojis, or simply raising their hand. Provide clear instructions for break-out rooms, and check on your learners' progress regularly. You can use free online boards like Jamboard for collaborative work and ask quick questions with Kahoot or Mentimeter. Try to switch up your activities, break them into smaller chunks, and use breaks and energizers to let your learners recharge!	Designing questions for reflection at the end or „For those who want more“ segments can be a nice and easy way to give your learners something to think about. Put questions in the middle of your videos, poll your learners from time to time, organize peer-to-peer review assignments, and provide opportunities for project-based work that will use new knowledge and skills of your learners through the whole program!

Types of engagement	Face-to-face education	Synchronous education	Asynchronous education
Affective engagement	Face-to-face interaction offers many ways to foster effective engagement. Close social proximity provides plenty of opportunities for feedback, motivating gestures, and connection with others.	Set clear rules at the beginning of your program, and talk with your learners about possible ways to uphold them. Make feedback relevant and constant, as well as specific. Read our chapter on *Giving and receiving feedback* for more information! Always call your learners by name, and invite them to share something about themselves or things they value. Ask them about their motivation, and write it down. Also, ask them about their fears and take care to address them when relevant.	Create an environment that feels intuitive and user-friendly. Make videos as accessible as possible by using text-to-speech options, sign language, subtitles, and easy navigation options. Write out some suggestions for self-care activities and practical activities your learners can try out on their own, in their own lives, using the material you teach. Lead by example: show vulnerability, and always give something of yours if you ask your learners to do so. For example, if you ask them to „Describe the view from their window“, you better have your own directly below that sentence! Use real-life examples and stories if teaching about abstract concepts so that learners can connect. Use movies, books, music, and similar material. Reward your learners with badges, certificates, and other tokens to show their progress and keep them motivated.

Types of engagement	Face-to-face education	Synchronous education	Asynchronous education
Social engagement	The face-to-face setting provides simple ways to connect with the educator and other learners. It is sometimes hard to engage everyone the same, and educators' time and attention are usually in low supply when working with more people at a time, so setting up office times for one-on-one sessions and individual facilitation can greatly help some learners.	Looking at video conferencing boxes or black boxes of those without the camera on can be off-putting. Try to avoid Zoom fatigue by following our tips at the end of the chapter. Your learners could be socializing via private chat, so take care to set clear rules about it and a safe way for them to reach out in case of abuse from other learners. You can also switch chat off when you don't want to use it. Break-out rooms can be a great way to bring group work in an online setting, as well as using online boards (Jamboard, IdeaBoardz) Energizers that foster feelings of connection can be a great help. Consult the TRENDSS Trainer's Toolkit for various creative ideas!	Set up „office hours", a designated time in the week or month that learners can reach you, and set up a meeting with you online. Open a forum in which learners can socialize, share the material, and lead discussions. Organize the celebration and end of the program face-to-face or synchronous for those who want to attend. Print out some diplomas, give out candy, and take pictures together!

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5. Challenges: „Zoom fatigue“ and what can we do about it

Zoom is to video conferencing what *Google* is for web search, so *Zoom fatigue* widely refers to **fatigue and exhaustion from participating in video conference calls with any platform**.

It is a form of burnout. The **most common symptoms include** feelings of exhaustion and/or burnout, anxiety, depression, anger, forgetfulness, lack of motivation, frustration, irritability, social detachment, pessimism, insomnia, headaches, low productivity, and physical symptoms (pain, muscle tension, etc.). **It impacts women more than men** and depends on the frequency and length of video interaction and the time between them.

Here are five tips on mitigating the *Zoom fatigue effect*:

1. **Reduce the size of the window**. Excessive amount of close-up eye contact is not a usual way we interact and usually signals intimate or dangerous situations with others. Don't use full-screen options, and create a space to the length of your arm between yourself and the screen to reduce the cortisol-inducing closeness.

2. **Make „Camera off“ an option**. When not necessary, let yourself and your learners shut the camera off. It gives your mind and body a chance to recuperate, and you can use turning the camera on and off to significant effect!

3. **Hide your self-view**. While it can be fun and help you hold yourself to a higher standard, it also drains you of energy. Constant self-monitoring also takes your attention from the topic and learners!

4. **Take breaks**. Take care to introduce breaks into your sessions. While taking the break, it is essential to shut the camera off and take the effort to bodily face away from the screen!

5. **Use Zoom for fun**. Use them for fun activities to weaken the link between video conferencing tools and stressful situations. Meet your friends and family online, hold gaming sessions, and watch a movie with someone in real-time.

6. Questions for reflection

1. *Think about content that attracts your attention online. Can you use it to enhance your learning program?*

2. *What would be the most effective energizers for waking up your learners after a long break?*

3. *How could you include your favourite energizer in asynchronous education?*

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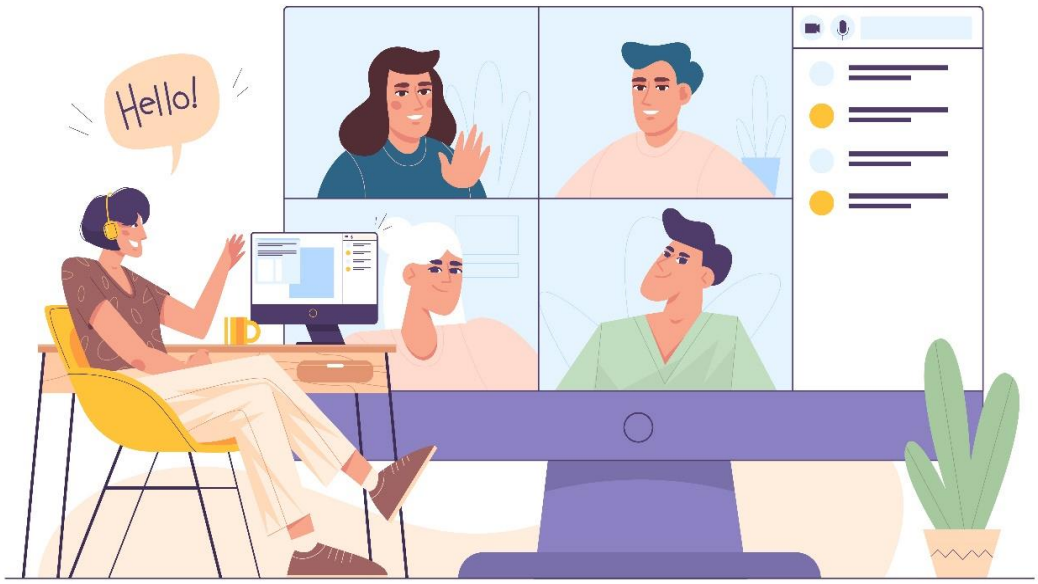
Chapter 9: Facilitating online discussions

This chapter examines the most common challenges in facilitating online discussions and effective strategies to overcome them. After reading the chapter, you should be able to:

- ✓ Explain the importance of discussion as an educational method,
- ✓ Use specific methods to engage participants in discussions using technologies in synchronous and asynchronous settings,
- ✓ Compare face-to-face, online synchronous, and online asynchronous methods of facilitation discussions.

The chapter includes the following sections:

1. *Facilitation of online discussions – what is the fuss about?*
2. *The role of the educator in facilitating online discussions*
3. *Practical advice and tips – how to engage, involve and guide learners in online discussions*
4. *Discussion in face-to-face, synchronous, and asynchronous educational settings*
5. *Overcoming challenges*
6. *Questions for reflection*
7. *References and resources*



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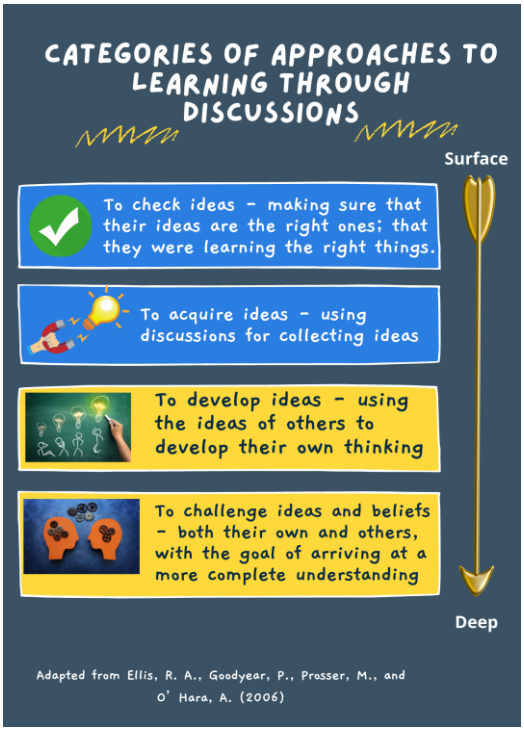
1. Facilitation of online discussions - what is the fuss about?



According to dictionary definitions, **DISCUSSION** is "a consideration of a question in open and usually informal **debate" (Merriam-Webster)**.

Discussion is one of the most important methods in education because it helps learners process and understand information better rather than simply receive it and stimulates the development of critical thinking. Leading a discussion requires facilitation skills that are quite different from delivering the information.

Discussion methods in digital education are open-ended, collaborative exchanges of ideas between the educator and learners, or among learners themselves. The purpose is to support the further development of learners' skills for learning, thinking, problem-solving, literary appreciation or understanding. Learners present different points of view, listen to and respond to the ideas of others, and reflect on their performance, their ideas to further develop knowledge, understanding, or interpretation of the subject in discussion.

Discussions may occur among members of a dyad, small group, or whole group and be educator-led or learner-led.

2. The role of the educator in facilitating online discussions

In the process of discussion, we as educators, play the role of facilitators. The definition of a facilitator is "to make it easy" or "ease a process". While facilitating discussions, the main tasks of facilitators are to:

- Create an inclusive environment of trust and support for effective communication,
- Challenge learners to think, see a problem from different angles, and search for alternative viewpoints,
- Keep the discussion focused and on track,
- Keep people engaged,
- Advance and deepen the discussion,
- Provide an opportunity for everybody to be heard,
- Leave participants a little "hungry" to engage in follow-up conversations,
- Help participants summarise and conclude the discussion.

3. Practical advice and tips – How to engage, involve and guide learners in online discussions

Facilitating discussions, in general, is not an easy task and according to the feedback from digital educators, facilitation of online discussions requires additional skills and effort. Let's investigate some Dos and Don'ts of facilitating synchronous discussions online. The first task will be to create an inclusive environment.

Methods for creating an inclusive environment

- Make sure that everybody is **familiar with the technology** that you are using – give a small tutorial if needed about how to use chat, emojis and reactions, virtually raise your hand, and rules of using a microphone and camera.

- It is crucial from the very beginning to create a **friendly, safe and relaxed atmosphere**. So, start with “get to know each other” activities – use name games and icebreakers from our website, for example, Good news festival or What is your spirit animal?

- **Name tag** - almost every video teleconference software has a “name tag” for participants. Sometimes when people join the digital platform, their name shows up as a number. Ask everyone to rename themselves and write the name they prefer to be addressed. You can also ask them to include other relevant information, such as the location they are joining from (country, city...) Or you can use the “rename” function as an icebreaker or warm-up activity and ask participants to write for example, “Name and one trait you have and are proud of” (“Name and colour you like, or an animal that you associate yourself with...)

- Set the **Ground Rules** - you can provide your already prepared list or ask the group to brainstorm and come up with the list of rules that will make them feel comfortable during the discussions. Here are some examples you can use:
    - Don’t interrupt, be respectful.
    - When you want to make a comment or join the discussion, you can raise your hand digitally using a special sign, physically or by writing in the chat.
    - Be an active listener. Try to understand others’ views. (Instead of thinking about what you are going to say while someone else is talking, pay attention).
    - Concentrate and comment on ideas, not individuals.
    - The goal is to learn, not debate. Comment to share information, not to dominate and convince.

- Avoid confrontation, blame, speculation, and manipulation.
- Make sure that everyone has the opportunity to speak.
- Watch out for any assumptions about group members. Don't generalise.

Check out these ground rules for online discussion from Colorado State University.

- A good practice for the beginning part of the session is to use **"Check-ins".** This is a simple tool to help participants transition from previous activities and be present in a group. In an online setting, it is especially important to give everybody the chance to have their voice heard at the beginning of the meeting. Check out the activity Battle of the argument.
  The size of the group determines the method you use for the check-in. In **small groups** you can give everybody the chance to speak by asking a question, for example:
  - How much energy do you have on a scale of 1-10 right now?
  - What is your expectation from this session?
  - Which animal best represents your mood right now? (Silly questions are very good icebreakers)
  - You can use an Emotional weather report.

  In the "screen mode" it is not very easy to imagine how to go around the "circle"; our advice is to call the learners' names as they appear on your screen and invite them to share one by one. You can also ask the person sharing to then nominate the next person by just naming, or "throwing the ball" (physical imitation of the movement, when one is "throwing" the ball and the other is "catching"). If time is scarce, you can ask participants to just share one sentence or even just one word or use a method for bigger groups.
  In **larger groups,** it's not easy for everyone to be heard, but there are still ways to give learners the chance to share. For example, you can ask:
  - Show your energy level on a scale from 1 to 10 using your fingers. For this, you could use the power of scaling.
  - Ask a check-in question and ask them to write their answer in the chat, then read a few of them out loud.
  - Use the breakout rooms to put learners in pairs or small groups and answer a check-in question.

- Make sure that you are using **inclusive language**. It is especially important when you are working with multicultural groups.

- Ask for clarification if unclear about a learner's intent or question.

Methods for creating engagement

- Ask participants to turn their **cameras on** if this is possible - one of the major benefits of synchronous online educational programs is the opportunity for interactions, socialisation, and connections. Having a camera on will mobilise the learner to be more engaged and will help you as a facilitator, to get visual feedback about group dynamics.

- **Individual reflection and journaling.** Instead of going straight into a group discussion or activity, it can sometimes be more efficient if participants have time to gather their thoughts and reflect on themselves. Ask everybody to prepare any writing tools (pen and paper, notebook, iPad, word document etc.). Choose the question for journaling – individual reflection and type it in the chat or bring it on the whiteboard. Allow learners to ask clarification questions if something is not clear. Tell them how long they can reflect/write (e.g., 2-3 min) and invite them to turn off their cameras if they feel more comfortable. You can turn calm, meditative music on low volume as a background while keeping the reflection question on the whiteboard. Don't forget to keep the time!

- **Breakout rooms.** Some video conferencing software platforms have a great possibility to break the whole group into pairs or small groups, which will help learners to talk, share and be heard. Before putting people into breakout rooms, it's important to give clear instructions.
    - What is the topic or question of the discussion?
    - How long will they be in the room?
    - Will the discussion be structured (each person has 2 minutes to share for example) or will the participants decide on how to organise the discussion?
    - Should they prepare a presentation with the key points from the group discussion?
        - Information about Zoom Breakout rooms

- **Listening Circles** are a great method to ensure that everyone has time and space to be heard equally and allow all group members to share their opinion and perspective. After announcing a central topic or discussion question, go around the 'circle' and ask each participant to share. Ask everyone to keep the rule - speak only when it is their turn. Everyone is allowed to say pass if they don't want to speak. If you have enough time and the topic permits, have one or more additional rounds. Instead of the facilitator naming the person who will speak next is to ask each person to "call out" the next person once they've finished sharing - "throw an imaginary ball". Important here is to make sure that everybody is equally involved.

- **Popcorn** is a Zoom community term and essentially means that anyone who would like to share – or go 'pop' – can do so. Here it is very helpful to use the digital hand-raising tool to keep track of who wants to share. This is a good method to use if there is not enough time for everyone to share in a listening circle, or if you want to create a more organic dialogue. It is very important that people listen to each other and respect each other's space for sharing.

- Use a **whiteboard** for capturing the group's thinking. It is very important that you capture the key ideas, questions and decisions that arise during a meeting. To ensure that you can concentrate on facilitating the process, designate one person in the group as the recorder. Some video conferencing software platforms have in-built whiteboards (Zoom, Microsoft Teams, Skype, Heyhi ...). You can use other online whiteboards too, such as Miro, Stormboard, Mural, Limnu, and Conceptboard).

- **For harvesting ideas and insights** from the discussions, you can use a shared Google document and ask participants to make their input. The benefit of this method is that everyone can see what everyone else is writing, it creates the feeling of working together, it's efficient, increases interest and engagement, and it allows you to get into the discussion process in writing. The best practice is to set up the document with the questions that you want them to answer beforehand, and then post it in the chat.

- Research shows that visuals increase the engagement of learners by as much as 94%. They also help increase attention and memory, boost feelings of inclusiveness, and encourage interaction. Use **Screen share** for sharing videos, visual material, presentations, and questions for starting discussions. Keep in mind that some participants have a predominantly visual learning style and the more visuals you use, the higher will be their engagement.

- **1-2-4 – All.** This is a technique from Liberating Structures which taps into the collective wisdom of the group and gives space to everyone's input no matter the size of the group. It is a nice way to link the methods described so far. This is an adapted version for an online format, and of course, you can adjust the timing depending on the context.
  1. Define a central question,
  2. Give everyone 1 minute for the written reflection,
  3. Divide the group into pairs, send them into breakout rooms and give them 1 minute each to share,
  4. Put pairs into groups of four in breakout rooms and give them 4 minutes (1 minute each, or reflecting together),

5. Bring everyone back into the main room. Then you have several options:
    - Ask each group of 4 what was one idea that stood out from their conversation? or
    - You can ask everyone to write in a shared document.

After this use the method of a listening circle or invite a few people to share if they wish.

- **The 5-minute rule.** One major challenge for digital educators is to keep learners engaged. Never go longer than 5 minutes without interacting with the group and giving them a task or problem to solve.

  Remember that participants are surrounded by various tempting distractions and if you don't keep them involved, they can retreat into an observer role (in a good case) or even totally disengage. What can you do? While presenting the topic, and facilitating discussion, every 5 min keep everybody busy by asking them to perform different tasks:

  - "If you agree, type in chat letter B, if not, type letter O" (You can be creative here, give them random letters, numbers, or symbols to type to keep their attention on the topic and with you)
  - "If you like it, press the smiling emoji, if not - then press the one with tears"
  - Let's stretch! Let's breathe in and breathe out...

- **Use Gamification.** Incorporating elements from games will increase the engagement of learners in the process. You can use platforms like Poll Everywhere Competitions, Kahoot or Mentimeter to gamify your content and process.

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Methods for encouraging participants

You can encourage the participants by:

- ✓ Writing their comments on the whiteboard,
- ✓ Asking follow-up questions and paraphrasing the comments for everyone to consider. You can use probing questions to help your learners to bring out their ideas,
- ✓ Using clarification questions,
- ✓ Giving credit to discussion contributors,
- ✓ Inviting others to add their reactions or ideas to build on previous comments,
- ✓ Admitting if you don't know something; don't be afraid to admit your ignorance or confusion – invite others to contribute.

Don'ts:

- × Don't use specific terminology, certain conventions or language that will exclude certain groups from understanding the context of the discussion or make them feel uncomfortable.
- × Don't assume all participants have the same expectations when the group gets together.
- × Don't over-generalize behaviours or have stereotypical expectations of participants (tokenism).
- × Don't use (or allow others to use) disrespectful language or tone, or disrespectful non-verbal communication.
- × Don't convey a sense of self-importance or superiority.
- × Don't allow only the dominant or more verbal participants to take over the conversation.
- × Don't discourage alternate views or counterarguments.

How to prepare good discussion questions

Preparation is the key to success, and facilitating online discussions is not an exception. While preparing questions for a discussion, use the following tips:

- Decide what your purpose is: to check the knowledge, brainstorm new ideas, help learners to see new perspectives or to spark interest?
- While shaping the question, think about the final goal.
- Try not to use closed questions that prompt a yes or no answer.
- If you still get closed answers, ask learners to dive deeper and justify their responses.
- Be aware that different questions elicit different thought processes.

Types of questions that stimulate different kinds of thinking

Convergent Thinking - Using Logic	Divergent Thinking - Using imagination	Evaluative Thinking
Usually begins with words: • Why • How • In what ways...	Usually begins with: • Images • Suppose • Predict... • If..., then... • How might... • Can you create... • What are some possible consequences of...?	Usually begins with words and phrases: • Defend • Judge • Justify... • What do you think about...? • What is your opinion about...
Examples: • How does formal education differ from non-formal education?	**Examples:** • Suppose that... Would ... • What predictions can you make regarding... • How might the educational system differ in 2100 from today?	**Examples:** • What do you think are the advantages of online courses over face-to-face ones? • Is it fair that ...? • How do you feel about ...?

4. Discussion in face-to-face, synchronous, and asynchronous educational settings

Online discussions can be classified as synchronous – happening in real-time in the chat or face-to-face conference mode or asynchronous, via discussion forums. Let's look at the quick summary of what, when, why and how of the two modes of communication and discussions (adapted from Hranstinski, 2008: Asynchronous and Synchronous E-Learning).

When, why, and how to use asynchronous vs. synchronous e-Learning[37]

	Asynchronous	Synchronous
What	Delayed mode of communication Allows for cognitive participation	Real-time communication Supports personal participation
When	Reflecting on complex issues	Discussing less complex issues Brainstorming ideas Getting acquainted Planning tasks
Why	Increased reflection and ability to process information. Learners have more time to reflect, as an immediate answer is not expected	Increased excitement and motivation to participate. Learners become more committed and motivated because a quick response is expected.
How	Use discussion forums, e-mails, and blogs.	Use chat, videoconferencing, instant messaging, and online meetings.

[37] Haythornthwaite and Kazmer, "Bringing the Internet Home."

5. Overcoming Challenges

Facilitating discussions generally means that you deal with the interaction of different opinions and characters, and there is a possibility that problems and tension will arise. We invite you to look for some common problems and suggestions for how to deal with them.

- **The whole group is silent and unresponsive.** Sometimes learners are reluctant to participate actively in the discussion. To help them to join and participate, you can use several methods:

    - Post the question and ask to think individually, reflect, and maybe even write down some notes. You can put in some music (better without lyrics so as not to distract the thought process).
    - Divide learners into pairs or small groups and ask them to discuss the question.
    - After a few minutes of small group discussion, ask everybody to report the results of their group discussions. This method helps to engage shy and quiet learners to first formulate their ideas in an individual setting and then "try them out" in a safe environment of pair conversations. As experience shows, by allowing different kinds of pre-discussion activities, you create a welcoming environment for different learning styles and promote equity in the conversation, which increases engagement and active participation of all instead of a few dominant and super-active learners.
    - Direct participants to a sentence, paragraph, slide, or table of data, and ask them to analyse it closely and carefully.
    - Draw attention to how the issue you're grappling with in the discussion has real-world applicability.
    - Summarise, or ask participants to summarise the main points of the discussion and solicit ideas about where to go next.
    - Invite participants to stand up, stretch, or move around the room. Use a fun energizer or warm-up activity to change group energy.

- **Some learners are constantly silent and unresponsive**. The best way to include those who are less active in group discussions is to allow them to share their opinions in smaller groups or pair-share discussions. When participants are divided into small groups, it makes it easier for them to speak up and share. A second strategy is to ask direct, open, exploratory, opinion questions occasionally (e.g., "How do you feel about this?"). This technique will ensure that participants will feel less fearful and more secure about answering incorrectly. Another technique is to ask participants to write their answers to a question. For those who are shy or fearful, this technique will be the best option to express their opinion.

- **Some of the participants talk too much.** If you have a dominant participant who tries to take all the space, you should use the technique of redirecting the discussion to another person or changing the topic. You could also reframe their comments and make them contributors to the discussion. You can also ask the person to act as an observer for a few sessions, reporting back his/her observations to the group. Perhaps assigning the avid talker to the observer role would help the person develop sensitivity. Another option is to break down the group into smaller task groups.

- **Discussion goes off-topic and becomes irrelevant.** Set clear topics and agenda from the very beginning. It is useful to keep a visual summary of the topics discussed for everyone to see. You can use or build-in teleconferencing software whiteboard, use an external link to the existing whiteboard or use your Whiteboard or Flipchart. You can ask: “How does what we are discussing relate to our topic?” You can ask the group to think again and agree on what they think should or should not be discussed.

- **Discussion turns into an argument**. In good discussions, conflicts will sometimes arise. If such conflicts are left unattended, they may cause harm to the educational process. Here are a few ways to resolve them:

    - If the solution depends on certain facts, you can ask participants to refer to the text or another authority.
    - If there is an experimentally verified answer, you can use the opportunity to review the method by which the answer could be determined.
    - If they argue about the values, you could use this opportunity to dive deeper and discuss how they understand the values. You can write both sides of the argument on the whiteboard.

      As a moderator, you can take a strong position, to prevent participants from speaking simultaneously or interrupting each other. It’s up to you to lay ground rules for discussion, for example asking participants to concentrate on ideas instead of people and to try to be less judgmental.

- **A disruption occurs** (somebody is late or lost the internet connection and joined again, somebody forgot to turn his microphone off). Discuss this possible situation in advance (beginning of the program) or send the group a PDF tutorial with instructions and rules.

- **Participant (learner) becomes argumentative (attacks) the facilitator.**
  You might have a participant who loves to argue for the sake of argument. If such a situation presents itself, try not to take the bait. Participants who attack often usually want attention, so simply giving them some recognition and acknowledging their contribution while firmly moving on often takes care of the problem. If participants are simply trying to embarrass you, they may seek to make you defensive with such comments as, “How do you know that…?” or “You’re not really saying that…?” To deal with these kinds of questions, you can use the method called **Boomerang**. You could respond: “What I’m saying is…, and now I would like to hear your opinion, your perspective”. When we turn the question back to the person asking the question, we force her or him to take responsibility for his or her words, ideas, and opinions. Other ways to handle these situations include:

  Confrontation – You can confront the person by asking questions about their reactions to his or her behaviour. “What I really hear you saying is...”
  Active listening – You can paraphrase the message they heard and check out the accuracy of their assumptions before responding.
  Locating – You can ask the questioner to explain the context behind the question.
  Reframing – You can try to clarify the assumptions behind the person’s argument and then invite her or him to see possible alternatives.
  Postpone – Sometimes the best strategy is to offer a “time-out”. Ask participants to meet after the session and find time to talk about the disagreement they have. You can move the discussion on to another topic. Just keep in mind that the best option is to have closure facilitated by you, as moving to another topic after a disagreement will leave some unresolved emotions.

6. Questions for reflection

1. *Think of the best and worst experiences you had as a participant in online discussions. What was the main distinguishing factor? Was it about the questions? About the group members? Or maybe about the style of facilitation of the process?*

2. *Which methods for engaging learners in discussions do you like and why? And which ones are challenging for you and how can you overcome those challenges?*

3. *How could you make the asynchronous discussion more engaging for learners? Which new technologies could you use?*

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Stefan Hrastinski, "*Participating in Synchronous Online Education,"* PhD dissertation, Lund University, 2007, available from http://www.lu.se/o.o.i.s?id=12588&postid=599311

Webpages:

1. Discussion methods
2. The role of facilitator
3. Tips on Facilitating Effective Group Discussions - The Harriet W. Sheridan Center for Teaching and Learning
4. Guidelines for discussing difficult or high-stakes topics
5. Center for innovative teaching and learning
6. Facilitating Group Discussions
7. Free fun icebreakers for online trainings
8. Asynchronous and Synchronous E-learning
9. Synchronous Online Learning
10. How to facilitate engaging meetings with Zoom
11. How to get people to actually participate in online meetings
12. Types of questions teaching critical thinking

Chapter 10: Verbal and nonverbal online communication

This chapter explores the concept of verbal and nonverbal communication and how they differ in face-to-face and online education. After reading the chapter, you should be able to:

- ✓ Explain the difference between verbal and nonverbal communication in digital learning,
- ✓ Describe various ways of using nonverbal communication in online teaching,
- ✓ Distinguish the cues for detecting interest in your audience and ways to influence it.

The chapter includes the following sections:

1. *What is verbal and nonverbal communication?*
2. *The role of the educator – the importance of a role model*
3. *How to communicate verbally and nonverbally in the digital realm*
4. *Verbal and nonverbal communication in face-to-face, synchronous, and asynchronous education*
5. *Overcoming challenges and misconceptions*
6. *Questions for reflection*
7. *References and resources*

Design: Jackson Best

1. What is verbal and nonverbal communication?

According to some definitions, "**communication** is a process by which information is exchanged between individuals through a common system of symbols, signs, or behaviour"[38].

The primary function of communication is to share information and feelings. Effective communication is vital to educate, train, socialise, motivate, entertain, and persuade. There are different types of communication – intrapersonal, interpersonal, group, mass, direct and meditated, synchronous, and asynchronous. Communication can be of different types – speaking, listening, visualising, observing, reading and writing.

To be an effective educator it is vital to be able to communicate effectively. Through effective communication, we can not only convey information, but encourage effort, modify attitudes, and stimulate thinking. Without effective communication messages can be distorted, stereotypes developed, and the learning process stifled.

There are many ways to facilitate effective communication. Your ability to masterfully use verbal language, body language, tone of voice, and visual cues affect how well you will be understood. Both verbal and nonverbal communication skills are vital to delivering an understandable message.

Verbal communication is the process of using words to share our ideas, information, and knowledge with other people. It can be oral, written or sign language.

Nonverbal Communication is the process of sharing meaning that we want to communicate without spoken or written words. For nonverbal communication, we use body language, hand movements, facial expressions, gestures and postures. Our nonverbal communication can be conscious or subconscious on both sides when we are in the role of communicator or receiver of the information.

Before we move to the practical tips on how to be effective communicators in digital educational programs, we need to clarify one misconception of the term "nonverbal communication". In the research "Nonverbal communication in text-based, asynchronous online education" author Rima Al Tawil shares her finding that some scholars very often use "nonverbal communication" and "body language" interchangeably. "Therefore, they assume that text-based online courses lack any type of nonverbal communication because body language is nonexistent."[39]

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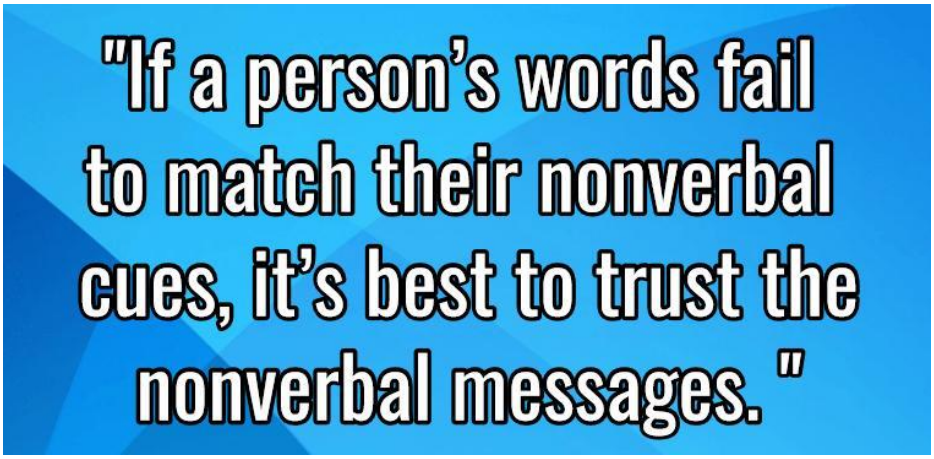
[38] Merriam-Webster definition

[39] Al Tawil, 2019



Design: Kaya Jackson

2. The role of the educator – the importance of a role model

Brazilian philosopher Paulo Freire wrote, "Teaching is not just transferring knowledge".[40] We as educators know that to teach is to create possibilities for the construction and production of knowledge rather than to be engaged simply in a game of transferring knowledge.

As an (online) educator, it is your responsibility to create an effective learning environment where learners will have the opportunity to develop required competencies.
Your role is not only to teach the subject but develop relationships with your learners. Different research shows that educators who foster positive relationships with their students create an educational environment more beneficial to learning and meet students' developmental, emotional and academic needs.

To do so, one of the most important soft skills you need to master, as an educator, is communication. You need to be an excellent communicator and know how to speak to a variety of different people to do your job effectively. You need to be able to communicate with learners, as well as with colleagues. To be a great teacher, you need to know how to talk *with* people… not *at* them.

[40] Pedagogy of Freedom

3. How to communicate verbally and nonverbally in the digital realm

Tips for verbal communication

In communication theory there is a concept of **immediacy** - "Immediacy behaviours can be defined as verbal and nonverbal communicative actions that send positive messages of liking and closeness, decrease the psychological distance between people, and positively affect student state motivation."[41] This concept is well developed and used in face-to-face education in contrast to the online learning context.

When an educator has well-developed verbal immediacy it enhances interaction, communication, and collaboration between learners. Here are some ideas that can help you to develop your verbal immediacy to use in online synchronous educational programs.

- **Be conscious of how you breathe**. To be a more confident and effective communicator who can use both verbal and nonverbal communication in the digital classroom, you need to master the art of breathing. One of the most common pieces of advice is to develop diaphragmatic breathing techniques - breathing slowly, and deep from the belly; it will help you to control the speed of speech and stay relaxed.

- **Project your voice.** Breath control and projection are critical skills for educators. The idea is to speak loudly and project without yelling. We already mentioned the importance of breathing from the diaphragm. Use the 'ha' exercise for the practice. Take a big breath in, expand your abdomen out and your lungs down – and then using "ha" force all that air out. This will help you to work on the projection of your voice. When using all your air on one sound at once, you can be loud and force that sound out. For more exercises about voice projection, you can click here.

- **Warm up your voice.** Relax your jaw and avoid tightening it. Your articulation, tone of voice and ability to control your speech will improve due to the free movement of air. Look into different exercises for warming up the voice of professional singers.

- **Speak clearly at a moderate pace.** In any setting, the rate of your speech is crucial. If you speak too fast and don't take pauses, it will make your learners feel rushed. However, speaking at a pace too slow can disengage them. Try to use a conversational, personal style in your presentations, lectures, or discussions. It will help you to control your breath, keep an even pace, and centre your body.

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[41] Instructor's corner: Nonverbal immediacy behaviors and online student engagement

- **Use different tones of voice.** If you are a good storyteller, it gives you a huge advantage. In an online setting and audio recordings having a varied tone of voice is a huge advantage.

- **Don't be afraid of silence.** Silence is a very important part of any educational process. It gives time and space to learners for reflection, analysis of information, organising their thoughts, and finding words to express their opinion. Silence can also make space for questions and discussion. Keep in mind that if a pause is too long it can cause discomfort, anxiety, or a feeling of disconnection, so pay attention and use it with caution. Experts advise that the recommended length for a pause and silence should be anywhere from five to ten seconds.

- **Be a communication superhero.** This is a slogan from the software site Krisp, which can help you to eliminate background noise, minimise distractions, feel more confident and "activate your communication superpower". Another interesting tool is Bouncy Balls which automatically warns you when the digital classroom gets too loud. You can program the website's settings so that if noise reaches a certain level, the site will issue a calming, "Shhhhhh." This is perfect for whole or small group activities in breakout rooms.

Tips for nonverbal online communication

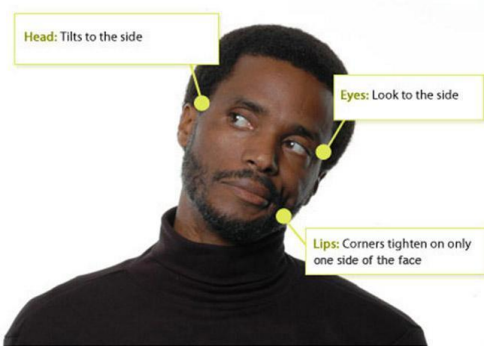
Not only what we say, but how we say something in a digital classroom can make a difference for our learners. In digital education, the interaction between educators and learners is limited, and this is especially true with nonverbal communication. If possible, set up a teaching environment with enough space so you can move freely.

Here are some practical guidelines for nonverbal online communication:

- **Use facial expressions**. Our face is extremely expressive, able to communicate countless emotions without saying a word. Learners are more involved when they hear an active, rich voice and at the same time observe facial expressions. Be aware that you as are communicating with your facial expressions and watch your learners' expressions as well. Because you are an educator – a person in charge and with power – your facial expressions can impact how learners perceive the educational environment and information. A face with honest, genuine expression will help to attract and keep the attention of your learners. Sometimes you can use different facial expressions to accentuate, stress, or exaggerate information that you are presenting verbally.

Try to use these tips:

- Respond as you would in real life. If somebody says something interesting, raise an eyebrow.
- If learners are showing good results, answering correctly, give them a big smile and nod
- When you nod, your movement attracts peripheral vision and learners will be drawn to you.
- Support your learners by using your face as well as your voice.



Try to learn how to read emotions from the facial expressions of learners. Look into the Greater Good Science Center at the University of California, Berkeley - Test Your Emotional Intelligence

- **Look at the camera and make eye contact**. Making eye contact with learners, and with the webcam when giving online discussions or lectures is key to success. Take deep breaths, and focus on the present moment, which will centre you and keep your eyes focused. Try to be as natural as you can and be as enthusiastic as possible about the information you are sharing. If you are recording a video, you can make and use notes. Just make sure to keep the notes close to the camera so that your eyes are not moving back and forth too much. Check this video about How to be confident on the camera.

  - Don't look away from the camera lens - it will break contact with the audience, and the audience can lose interest immediately.
  - Looking into the "virtual eyes" of your learners shows respect and caring.
  - Not looking at the camera lens can make you look unsure, nervous and untrustworthy.
  - The tips in this video will ensure you never break eye contact with your online audience again.

- **Stand or sit straight and relaxed.** When you stand or sit in front of a camera, make sure to keep your back straight and feet shoulder-width apart, with your dominant foot slightly in front of your other foot. Don't lock your knees, keep them relaxed; it will improve your posture and you will feel more confident.

- **Maintain your presence and focus.** The best way will be to have a relaxed posture and a straight back, for this you need to breathe from your diaphragm. Pay attention to this advice when recording yourself.

- **Gestures.** To make what you say more compelling, try to use your hands and body deliberately at particular moments of importance when you want to stress something. Watch yourself not to use this technique too often, as it might become distracting. When you record video, feel free to use gestures, just pay attention to the frequency and camera angle.

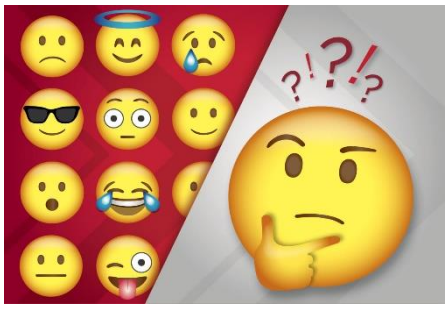
  Gestures and body position can reveal a person's stress level. In the digital setting pay attention to your learners' posture. Can you read if they are relaxed or stiff? Body language expert, Joe Navarro tells us that interest is shown by leaning forward to hear better.
  Tip: If you sense that learners are tired and bored, break the pattern – use an unusual but very helpful tip – ***encourage stretching****. It will increase the amount of oxygen, help with circulation, and provide a natural burst of energy.* Check this video Online Teaching Gestures.

- **Use Hand Signals.** Watch this video about hand signals for class discussions. This technique could be used for small online classes where you can see all participants on one screen.

- **Set the Stage.** Our environment is part of our nonverbal communication with learners. So, put some effort into preparing your physical space where the webcam is used. Find a neutral background with minimal distractions. Make sure that you have enough room to move around and use a whiteboard or relative objects for visual displays. Try to move a little slower and very intentionally when working in front of a camera or recording a video. Your goal is to draw learners' attention to the lesson content or your movements, depending on what you want to draw their attention to and what will be the best way to help them learn. As a rule, our eyes tend to be drawn to movements, so make sure that any movements in your background are intentional and planned by you.

- **Tone of voice, timing, and place.** Observe carefully and ask yourself: What does the voice of the learner sound like – is it confident, warm and interested or passive, inactive and blocked? Are the learners disinterested and cold or tense and overwhelming?
  Are their nonverbal communication cues congruent with their surroundings? How fast is their body language response? Pay attention – all these questions can be answered through careful observation, and they will be invaluable for you to communicate effectively with your learners.

- **Using Emoticons.**



In asynchronous teaching, emoticons perform nonverbal communication functions. Psychology researchers from the University of Chichester in the UK propose that we are not using enough emojis. In digital communication, emojis can be engaged as a substitute for the missing body language, which research shows to be responsible for as much as 55% of communication, while another 38% come from the pitch and tonality of a person's voice.

Incorporating emojis or images can aid the person reading your text message to decode its tone. "Emojis can help immensely in communication as a proxy cue of the attitude of the communicator," said Dr Banerjee. "[They are] **quasi-nonverbal cues**. Emoticons allow receivers to correctly understand the level and direction of the emotion, attitude, and attention expression. Apart from conveying the attitude, emojis can also provide reassurance that the receiver may need."

Check out interesting teaching tools and how visual cues could help you in your digital classroom.

- **Clusters.** Don't judge nonverbal communication signs in isolation, separately. All body language signs should be considered in relation to each other instead of being judged individually.

Watch out for the cultural differences in nonverbal communication!

In different countries, certain forms of nonverbal communication can have different meanings. If you work in a multicultural setting, make sure that you understand the specifics of your learners' nonverbal communication cues. Among the wealth of information provided by the internet, check out this source about Cultural differences in nonverbal communication.

4. Verbal and nonverbal communication in face-to-face, synchronous, and asynchronous education

Face-to-face education	Synchronous education	Asynchronous education
The main difference between F2F and digital communication in an educational setting is that in face-to-face communication you have more opportunities and possibilities to see and feel members of the group, which makes it easier to "read" nonverbal cues from learners. There is a fascinating study about Neural Synchronisation during Face-to-Face Communication, where the brains of participants were scanned while they were engaged in different kinds of communication. The conclusion is that there is a better "neural synchronisation" between people when they are involved in face-to-face communication.	Synchronous educational programs run in real-time, with learners and educators attending together from different locations. The main strengths of synchronous online learning are real-time interpersonal communication by using natural language and immediate feedback. Like in face-to-face education, in a synchronous mode of teaching and learning verbal gaps are filled out by nonverbal cues, which provide visual, optical illustrations that help to emphasise, affirm, or deny the meaning of the verbal message. Remember that teaching in a synchronous digital classroom requires more focus on communication, as in the digital realm everything is more challenging. How you are seated at the camera, can be interpreted as a message - you are leaning forward or withdrawing and leaning back communicates powerful information about your emotional state and attitude.	The major difference between verbal and nonverbal communication in synchronous and asynchronous modes of education is that in asynchronous verbal communication There is a common belief that nonverbal communication doesn't exist in asynchronous online education. But recent research "Nonverbal Communication in Text-Based, Asynchronous Online Education" and our own experience confirms that even though limited, there are some methods and tools to transmit nonverbal messages. Try to use several techniques: 2D visuals that include: ○ Surrogates for body language in the form of pictographs, emojis, and emoticons ○ Profile pictures and photographs of family and pets ○ Illustrations in the form of graphics and diagrams ○ Font style, colour, size, and format Text layout and length[43]

[43] "Nonverbal Communication in Text-Based, Asynchronous Online Education" - https://files.eric.ed.gov/fulltext/EJ1207480.pdf

Fact is, for educators it is much easier to use non-verbal cues in their communication and read learners' nonverbal messages when working in a real, face-to-face setting.	"Leaning slightly forward sends a positive sign of engagement. We lean back or pull back from people and things and ideas that we're not particularly on board with," [42] One of the most important nonverbal tools is eye contact. Unfortunately, in the digital realm, we cannot have direct eye contact. To create a feeling that you are looking directly into your learner's eyes, you should stare directly at the webcam. But like everything else, it has downsides - by staring at the webcam learners and educators may miss out on important visual cues when the presenter is delivering on-screen. One tip from experts is to put a little smiley face drawn on the post-it above the camera so you have the feeling that you are talking to a real person. It adds to your voice some warmth and creates an environment where people feel comfortable.	By using emoticons, you could convey excitement, frustration, passion, and other various emotions. You can emphasise key ideas by choosing font and format. it could be a way to show others how one feels about the topic. When we communicate personal perspectives and emotions in a meaningful discussion usually the level of engagement and motivation increases. One other interesting way to bring nonverbal communication to asynchronous education is so-called **ASET;** this is an abbreviation for "Electronic Style, Effort, and Tone". It includes the writing style, choice of words and expressions, tone, structure, layout and format.

[42] Virtual meeting 101

5. Overcoming challenges and misconceptions[44]

One of the major challenges, when we talk about communication, is how to detect a lack of interest in the virtual classroom. One way is to observe body position, it can tell you a lot – whether the learners are facing you or not, whether they are looking at you or turning their head away, whether they are crossing their arms or not, do they seem tight or relaxed, etc. Let's look at some of the major signs that you can observe in your virtual classroom.

Arms and Upper Body

The obvious sign of the lack of interest is "closed" gestures, for example, crossed arms or using other objects to create barriers. Crossed arms in front of the chest, usually is a sign of a desire to distance oneself from an unpleasant person or topic. On the contrary, when a person has open hands with the palms facing another person (in this case virtual, on-screen counterpart), it shows openness and calmness.

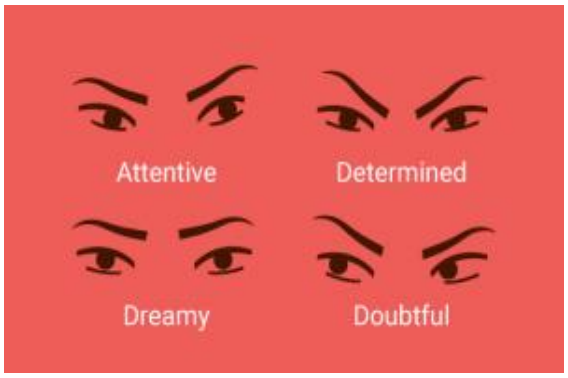
Design: Maya Kolarova - *How to recognize a lack of interest in the virtual classroom*

The hand clenching is another gesture that shows the desire to "close" oneself off. Like other negative gestures, this one also shows the learner's discomfort. Sometimes clenching could be combined with using an object, such as a pencil or a pen. If the object is held between both hands and is pointed at the person who is speaking it can be considered an aggressive gesture. It shows disapproval and the desire to "attack" an opponent or even to "destroy" what is being said or discussed.

[44] This whole section is adapted from the article "Virtual classroom insights: how to recognize a lack of interest in your students"

Eyes

Besides hand gestures, you should be conscious of the gaze of your learners, which can indicate a fading interest level and low motivation. Usually, your focus lasts longer when you are interested and motivated. When a gaze wanders around and explores its surroundings, it is an indicator of a lack of interest. We, as educators, must bear in mind that facial expressions such as eye-rolling convey a strong message of disagreement and not necessarily a lack of interest. Moreover, after a couple of eye rolls, the student may be willing to verbally agree or disagree – whichever the case requires – to move on from the topic at hand.



Design: Maya Kolarova - *How to recognize a lack of interest in the virtual classroom*

Facial Cues

In digital classrooms, one of the challenges is that generally, we see only the shoulders and face of our learners. Pay attention to the faces! Human faces are very informative, and you can tell a lot about your learners' engagement and motivation level by observing their faces; you can decode emotional states or reactions to a message. Eyebrows are important for conveying information. They form a significant part of a facial expression. Even a slight change in the eyebrows can completely change one's look. According to Paul Ekman there are universal emotions that are easily recognizable all over the world, such as contempt, disgust, happiness, fear, sadness, surprise, and anger. To find out more, explore these different theories about emotions (James-Lange Theory of Emotion, Cannon-Bard Theory of Emotion, The Two-Factor Theory of Emotion, Richard Lazarus's - The cycle of emotion).

Design: Maya Kolarova - *How to recognize a lack of interest in the virtual classroom*

You can use the information you can “read” from the faces of your learners to evaluate whether they understand the material well enough, whether they are exhausted, etc. For example, smiling is the natural reaction of people when they are pleased and when they have a positive attitude towards other people. In the virtual classroom when we see smiling learners, it helps us to keep going. The effect of a nod is almost the same. Nods show interest while shaking head sideways expresses disagreement. The lack of smiles and nods could be read as a concerning nonverbal cue of disinterest and lack of motivation. Keep in mind that all these tips are generalisations. Any human interaction is very personal, so listen to your learners and your heart and make your own decisions.

Pay attention to the pace of speech! When learners begin to speak very slowly, it often means they are trying to buy more time. This might indicate that they are distracted and cannot follow the speed of the educational process.

Other cues

There are many small nonverbal signs that, when considered separately, do not indicate disinterest or lack of motivation. However, when put together, such cues can be signals for educators that something needs to be changed. Examples of such cues are frequently checking a cell phone, constantly looking around, looking at the watch, yawning, eye rubbing, as well as all other things that can create a distraction from the learning process.

6. Questions for reflection

1. *Reflect, analyse, and compare face-to-face with online educational processes regarding verbal and nonverbal communication. Think about challenges you’ve encountered. What was missing in the process?*
2. *Think about your own attitude toward online education and how you feel when you are taught or study online (do you get tense, anxious, think that it's a waste of time, are bored, or do you like it, does it motivate you, inspire you?). This kind of reflection will help you to understand how your personal attitude influences group dynamics.*
3. *Observe and study how you use your body when teaching online – observe your breathing pattern, your voice timbre and tempo, your posture, and the distance you keep between you and the camera – can others see only your face or your torso and hands too? This will help you to define which skill you would like to work on.*
4. *What are three main skills that you would like to work on starting right now, today?*

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Webpages

- Effective Communication
- 5 Ways to navigate Non-verbal Communication in the digital classroom
- 4 tips on Nonverbal communication in the online classroom
- Non-verbal communication in Text-based, Asynchronous Online Education
- Make online messaging personal by embracing the nonverbal
- The importance of nonverbal communication in virtual meetings
- Effective communication for teaching and learning
- Verbal vs Nonverbal communication explained
- Communication in online classes: 6 tips to help you improve
- Essential Soft Skills for Teachers
- Virtual Classroom Nonverbal communication
- Use Hand signals when remote teaching
- Improving Verbal and Nonverbal Communication with Students Online and Face to Face
- Virtual Classroom Insights: How to recognise a lack of interest in your students
- Nonverbal Communication
- Online learning Tools: Asynchronous Communication

Chapter 11: Using embodied and kinesthetic learning activities online

This chapter explains the importance and benefits of using kinesthetic and embodied activities. It offers tips on successful in-person and online education implementation. After reading this chapter, you should be able to:

- ✓ Explain the importance of including kinesthetic activities in your educational courses and programs,
- ✓ Describe at least two methods for kinesthetic learners in your activities,
- ✓ Compare embodied and kinesthetic learning activities in face-to-face, online synchronous, and online asynchronous learning.

This chapter includes the following sections:

1. *Definitions, characteristics, and importance of using embodied and kinesthetic learning activities*
2. *The role of the educator in embodied and kinesthetic learning*
3. *Easy steps for incorporating movement in your learning activities*
4. *Embodied and kinesthetic learning in face-to-face, synchronous, and asynchronous education*
5. *Asynchronous education as a challenge for kinesthetic and embodied activities*
6. *Questions for reflection*
7. *References and resources*

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1. Definitions, characteristics, and importance of using embodied and kinesthetic learning activities

Before we dive into the practical part of this chapter, let's look through some theoretical information about kinesthetic learning, embodied learning, and body intelligence.

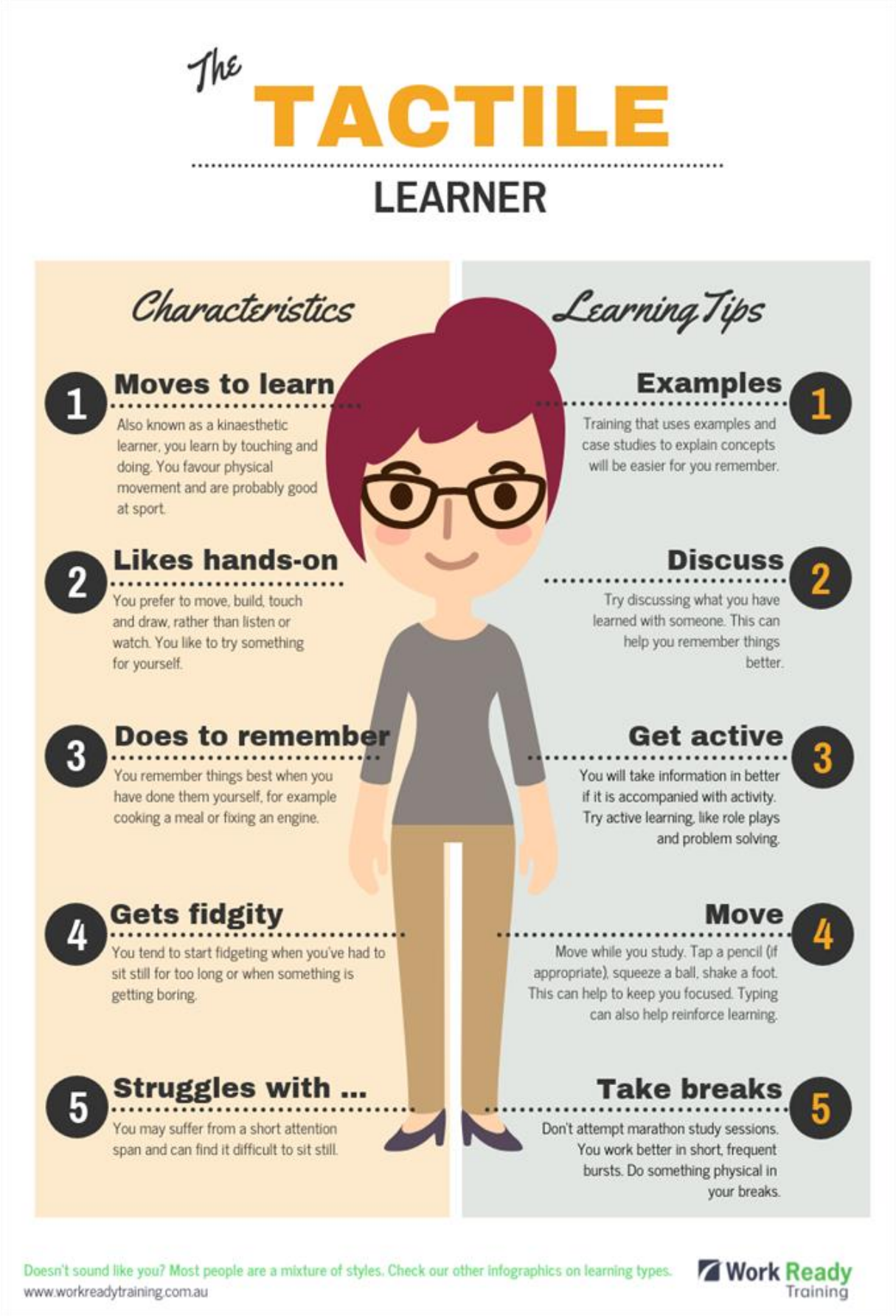
The bodily-kinesthetic learning style is an integral part of Howard Gardner's theory of Multiple Intelligences, often used when talking about education, course, and lesson planning. It refers to a person's ability to physically process information through (control of) movement and bodily expression.

We are all kinesthetic learners to some extent. Of course, a lot depends on the information delivered – for example, manual skills are best learned using the kinesthetic way. Also, watching a person doing movements activates mirror neurons like those we use while doing the activity ourselves. It reinforces the memory processes and aids learning in unique and exciting ways.

Some people prefer kinesthetic learning to others: we'll call them kinesthetic learners. For example, they want to touch and manipulate objects when learning about them. Kinesthetic learners usually love working and using their hands, have a lot of energy, and like to move.

When thinking about kinesthetic learners, keep these characteristics in mind:

1. They cannot sit still for a long time,
2. They understand more and better when learning through hands-on experience and movement,
3. They can get bored and have difficulty concentrating on "dry" presentations and traditional approaches to learning,
4. They like to directly engage with the material (for example, building things and working with their hands),
5. They are interested in being active participants rather than passive observers of a learning process,
6. They love testing and experimenting, as well as creating in a learning process,
7. They need more breaks – they get restless when sitting for long,
8. They can be expressive by nature and gesture a lot.



Source: https://www.workreadytraining.com.au/whats-your-learning-style-tactile-learner

Embodied learning is a modern educational model that goes beyond kinesthetic learning. Recent developments in cognitive science, pedagogy, and andragogy focus on the added value of the embodied learning model, which dictates that **the body and brain work together as a part of a linked system.** Body movements influence cognition, just like cognition influences body movements! For example, when you move the muscles included in a smile, your thoughts will get more settled.

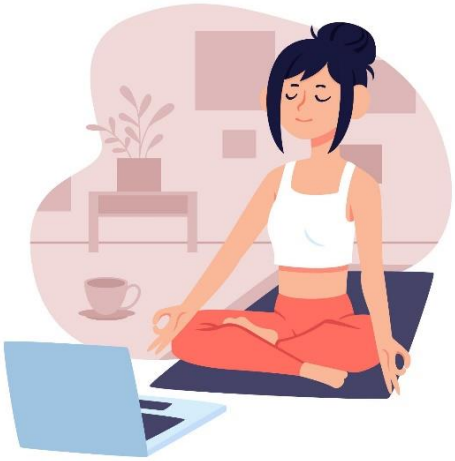
Body Intelligence (BQ) comprises awareness, knowledge, and body engagement.

- *Body awareness*: you know your body and can describe the physical sensations you are feeling. It also includes being conscious of body signals and adjusting according to them.
- *Body knowledge*: "health literacy". It includes knowing the standards, guidelines, and practices for ensuring a healthy body.
- *Body engagement*: doing what's best for your body, with your body.

2. The role of the educator in embodied and kinesthetic learning

In the virtual space, physical movements and sensations are limited. You should find new ways to involve and engage your learners, especially those who prefer kinesthetic learning methods. You are responsible for creating a safe and inspiring environment that will activate your learners in all ways possible to keep them engaged – and it's important not to forget about body and movement.

It is essential to build and deliver educational programs with the well-being of the participants in mind - but it is also necessary to cultivate your body intelligence because it will help you maintain sufficient energy through the demands of online education. Pacing yourself is important!



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3. Easy steps for incorporating movement in your learning activities

How to accommodate the needs of our learners, especially kinesthetic learners, when we are not in the same physical environment and communicate only through digital platforms?

You can approach kinesthetic learners through four sides: hands-on, whole body, artistic, and emotional. While a hands-on learner may prefer a challenging game that involves point-and-click actions, creative learners will choose to express themselves during the online learning activity creatively. For example, they might create drawings or doodles or take visual notes as they process the information. Whole-body learners benefit from online simulations, and emotional learners do well with using images and storytelling techniques, for example, "Story of your name" or "Drag and drop story". It is essential to do a needs analysis of your learners so that you can customize the learning experience to meet their needs and preferences.

As we mentioned, kinesthetic learning experiences should be tactile, involving movement, interactivity, and direct contact with the learning materials. All these things can be difficult to achieve in the online setting. Try this interesting activity - Dancing Hands from our Trainers' toolkit.

Seven methods for including kinesthetic and embodied learning in your online activities

- ✓ **Include a wide range of tactile activities in your program**
  Even if you don't have the time, resources, or cutting-edge technologies to create highly immersive materials, you can still introduce tactile elements into your course through simple learning management tools such as drag-and-drop activities and flashcards. Here you can check a video tutorial on How to Create Drag and Drop Activities on Google Slides. And here, you can read step-by-step instructions on creating drag-and-drop activities.

  Quizlet is an educational app where you can create your educational **flashcards** for online use. According to research, "clicking on an object and moving it to a target can make online learners feel more connected and improve knowledge retention."
  One example is developing tablet or mobile-based activities requiring swiping, tapping, and motion controls. Check out instructions on developing tablet-based activities.

  Interactive presentations are another way to make your program kinesthetic-friendly. To grab and hold learners' attention, you could use one of these 12 software for creating interactive presentations.

- ✓ **Make program materials as engaging and interactive as possible**
  One mistake in online education is believing that we can primarily involve only our eyes and ears. Using modern technology, use different methods to include your learners' sense of retention (touch). To create realistic, immersive experiences for online learners, you could use Virtual and augmented reality environments, and simulations. Of course, we understand that not all of you will be able to use these complex modern technologies for your courses, but at the same time we believe that this information can sparkle your curiosity and may lead to new creative ideas. Even simple enhancements to lectures, such as including pictures or sound effects, can help remind learners of the real-life situations that the material is related to and can thus increase the understanding and engagement of your learners.

  One great way to motivate learners is through the use of **mind-mapping activities** and assignments, allowing learners to layout images and make tactile connections. If you like adventure games, learn how to create your point-and-click eLearning games. You can also check our set of embodied resources for online classes at: https://trendss.eu/trainers-survival-kit-in-the-digital-era/!

- ✓ **Make it Emotional**
  Online experiences linked to emotions are more memorable, and as we mentioned earlier, kinesthetic learners need this connection. You can use different colors and visuals that evoke strong positive emotions. Investigate using graphs, infographics, progress bars, and other means to create visuals. Don't forget about music!
  It would help if you created assignments with real-life connections through material kinesthetic learners can connect emotionally because this helps visualize real-life applications and abstract concepts. This can be done by using methods of role-playing activities and case studies.
  You can find more detailed information about role-playing as a method here. Kinesthetic learners love real-world case studies and examples – include them in your program! They will inspire and motivate your learners and help them to relate to the subject matter on a more profound, personal level.

- ✓ **Use video creation assignments**
  Asking learners to create videos can help encourage kinesthetic learners to incorporate physical activity into the information they are learning, thus retaining them. For example, you could ask learners to keep a video blog or make videos of themselves performing a task related to the course material. Some user-friendly video editing apps are Adobe Premiere Rush and DaVinci Resolve. For mobile creation, try PowerDirector or Quik.

- ✓ **Send learners on virtual field trips**
  Because kinesthetic learners enjoy exploration, immersion, and emotional involvement, creating and sending them on virtual field trips are excellent options for helping them engage in new topics. You can either use websites that already have field trips, create them yourself (here is a tutorial on this), or assign learners to develop their own virtually or physically. Check out Roundme, Google Earth VR, or Google Arts&Culture.

- ✓ **Invite learners to explore through experimentation**
  Instead of simply offering your learners the answer to a common problem or challenge, provide them with the resources they need and ask them to arrive at their conclusions. Include links to external articles, sites, and videos they may find valuable and supplemental online activities that they can access on their own time.

Three core facilitation principles for kinesthetic learners

1. **Challenge learners to do simple tactile exercises.** Encourage learners to take notes! Remind kinesthetic learners to draw sketches or diagrams of what they're learning or stand up and physically act out a concept if they can. You can use the Annotate feature in Zoom and allow learners to write and draw on the whiteboard or slides that you are presenting. Here you can find a tutorial. You can suggest writing notes on post-its and sticking them on the wall in a pattern that helps organize concepts. You can use online interactive post-its through Miro, Stormboard, Mural, Limnu, or Conceptboard. You can also create templates or handouts that learners can print out and fill in to keep their hands engaged. These techniques will help kinesthetic learners focus on and retain what they learn.

2. **Remind learners to take a break and move.** As you already know, kinesthetic learners have trouble sitting still for a long time and keeping focused on a static resource or topic. It is crucial for this type of learner and all others to have frequent breaks with physical movements. Try our activity "Objects around you" or "Outfit for today". On top of that, you can use different resources from the website Physical Activities - Cube for teachers, for example, this fun activity "Star wars would you rather" or PE games for Zoom.

3. **Help learners visualize complex processes.** Steps and procedures can be complicated for kinesthetic learners to follow unless they can imagine themselves following the steps. So, if an assignment or instructional material contains a complex process, encourage learners to visualize themselves doing the procedure to help them associate physical motions with the information.

4. Embodied and kinesthetic learning in face to face, synchronous and asynchronous education

Face-to-face education	Synchronous education	Asynchronous education
In face-to-face education, you are in the same physical environment as your learners - you can observe, evaluate, and react to the participant's body language and different physical and body language cues. When you use embodied pedagogy in your class, your aim is to engage learners, raise emotions, activate all senses and create an atmosphere where learners interact with each other and space around them. Because of the close social proximity in face-to-face learning, you can have embodied interactions in a shared physical space and use physical activities, games, and challenges that can satisfy the kinesthetic needs of all learners. You can use different techniques to increase or decrease dynamic in the group by connecting with their own bodies.	In a synchronous setting, learners can see and feel your presence, you are embodied in the process of teaching. You can partially see and observe the participants' body language if their cameras are on. If not, you could ask them to describe their state and mood with emojis. You can use some physical activities, games, and challenges to engage kinesthetic learners – it can be in front of the screen or not. In online synchronous education you can use the same tips as in face-to-face setting, you just need to adjust and modify activities for online use. It is important to pay attention and consider the learners' embodied presence in the virtual classroom. You could use physical activities that helps to feel present into the moment, for example gentle breathing exercises or "chair yoga" with various stretches. This way you can create a cognitive reset and "recharge batteries". Try to use material from the sites Calm and Greater Good in Action of Berkeley University. Search for different creative ideas and activities in our TRENDSS Trainer's Toolkit.	The biggest difference is that in an asynchronous setting you cannot see learners and cannot assess their current physical state. Your task is to design the learning environment in a way that involves tasks for different learning styles, including kinesthetic. Instructions should be clear, easy to understand, and motivating. Read our suggestions and try to find your own way to reach all your learners through diverse methods and techniques. In an asynchronous setting the concept of embodiment is quite different from face-to-face and synchronous online learning. One advice for establishing your presence in an asynchronous setting, is to create a video-based introduction and course orientation at the beginning of a course, so you can welcome learners and let them see and know you as a real person. The embodied presence of educators and learners depends on what the technology offers. One way to make e-courses more interactive, engaging and immersive is to use avatars. Avatars are characters created to narrate, guide, and interact with learners. The avatar can be a text, image, icon or 3D shape through which educators and learners can participate in the e-course. Find out more about why, where and how to use avatars and try to see if this will work for you.

5. Asynchronous education as a challenge for kinesthetic and embodied activities

We already discussed how you could involve kinesthetic learners in the digital realm, but it mainly applies to the synchronous mode of digital education. One major challenge is to create quality educational programs for asynchronous forms of learning adjusted to the kinesthetic learners because you cannot facilitate the process and use different activities in real-time. All emphasis here should be on incorporating tasks for kinesthetic learners in the programme/course design.

There are a few solutions to consider:

- **Brain – Body coordination activities.** Include different videos about body coordination in your educational materials. Make it optional but try to motivate learners by giving them cues and explaining how these exercises stimulate the brain and make the learning process easier and more effective.

- **Use timing methods.** Make suggestions for learners to use regular breaks from studying to get their energy out regularly. TomatoTimer is an easy-to-use online Pomodoro technique timer. There are a lot of different apps that you can share as an option in your educational programs.

- **Use tactile digital tools.** It is impossible to handle objects and interact with each other in the asynchronous educational course. Use digital simulations and resources such as animations, video clips, or other freely available multimedia for low cost (MERLOT, WikiMedia, etc.). Use eLearning games and mobile learning activities that can help you integrate the sense of touch into your digital course.

  The simple act of clicking or swiping the screen can make your learners more immersed because it gives them the option to interact with the material. Use drag-and-drop activities, quizzes, and other simple ways of making your asynchronous education interactive!

6. Questions for reflection

1. *Looking back on the transition to remote teaching and your digital transformation, how did you take care of and nurture yourself? How did you satisfy your kinesthetic needs while designing and teaching digital educational programs?*

2. *Which provided above methods for engaging kinesthetic learners in the educational process do you like most and why? And which ones are challenging for you? How can you overcome those challenges?*

3. *Which instructional methods could you bring from the face-to-face teaching practice to the digital space, which could help kinesthetic learners be fully involved in your synchronous and asynchronous digital courses?*

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Webpages

- 5 Kinesthetic Learner Characteristics and How They Learn Best -
- Learning Styles: Kinaesthetic Learner Characteristics - Instructional Design For Kinesthetic Learners: 7 Techniques To Employ
- Bodily Kinesthetic Learning Style and Characteristics
- Montessori and Embodied Method of education.
- Embodied Cognition. The Stanford Encyclopedia of Philosophy
- Embodiment and embodied learning in online learning environments
- Embodied learning at a distance: from sensory-motor experience to constructing and understanding a sine graph
- Teachers' Embodied Presence in Online Teaching Practices
- Instructional Design For Kinesthetic Learners: 7 Techniques To Employ
- Learning through Interactive apps: 10 benefits to Visual and Kinesthetic Learners
- Five strategies for enhancing instructor presence in online courses

Chapter 12: Time management

This chapter deals with the most efficient time management strategies and techniques and discusses their application in in-person and online educational settings. After reading and exploring the resources in this chapter, you should be able to:

- ✓ List at least two roles of the educator in relation to time management in an online setting,
- ✓ Name apps that can help educators and their learners in managing their time,
- ✓ Explain how the flow can help manage distractions,
- ✓ Compare face-to-face, online synchronous, and online asynchronous learning time management practices.

The chapter includes the following sections:

1. Time as a resource and a burden – the importance of time management
2. The various roles of the educator in an online setting
3. How to deal with time – online
4. Time management in face-to-face, synchronous, and asynchronous education
5. Challenges: Managing distractions with flow
6. Questions for reflection
7. References and resources

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1. Time as a resource and a burden – the importance of time management

Time is one of the most precarious resources, so it is important to organize it well and plan how to divide it between specific tasks and activities. The process that enables you to work smarter is called time management. Research has shown that effective time management reduces job stress, which can be an important obstacle to job performance.
Online teaching redefines the schedule of educators not used to it and can lead to frustration, burn-out, and career change.
Managing one's time as an online educator is a challenge, but not an insurmountable one! In fact, the research is mixed on the question which takes longer: online or offline teaching.

The basics of time management for online education

Some of the most important habits and behaviours related to efficient time management are planning, setting priorities, organizing activities, scheduling assignments and tasks, delegating time and work, taking care of procrastination, managing external time wasters, focusing on one task at a time to avoid multitasking, and taking time for self-care activities to reduce stress and stay healthy. Apps like RescueTime and Focus Booster aim to make days more efficient by tracking some of the mentioned behaviours.

2. The various roles of the educator in an online setting

Educators have a big job ahead of them: they have to manage time themselves, think about time in a different manner while designing online programs, and manage the time of their learners.
Thankfully, time management is a skill that can be learned. Start small and build up!

Prepare yourself for efficient time management in an online setting

Creating a time management plan or schedule

The most important thing is to create and manage a time management plan consistently. The plan should take into consideration the learning course: make sure you allocate enough time for preparation, lectures, feedback, communicating with learners, sending out reminders and feedback, and setting up online office hours. Plans can be done for the whole course, or semester, and broken down into weekly portions for easier monitoring. Useful tools can be found at Toggl, Base Camp, Asana, and many other project management tools and apps.

1. **Establishing rules and expectations**

It is important to communicate clear and consistent rules and expectations for learners as soon as possible – even before the actual learning begins. It is even better to offer them a way to participate in the process with their own suggestions. It is especially important to set expectations for feedback and so learners don't get frustrated with long waiting times. Once the rules are introduced, they can be referred to throughout the course with minimal waste of time and effort. For example, you can make a visual representation of learning rules with Canva and send it to your learners by e-mail.

2. **Taking advantage of tools and technology**

Online tools can be useful for managing tasks that can be automated, like learner tracking, testing automation, self-grading, or rubrics added to assignments. Feedback can be more effective in audio or video form, which can be edited easily with tools like Audacity and DaVinci Resolve. In addition, online spreadsheets or calendars can help with time management itself. Online platforms like Google Classroom, Moodle, or Microsoft Teams have a lot of tools that can make course design and management less daunting.

3. **Taking advantage of existing resources**

You can free up your schedule by using pre-existing resources. There are plenty of quality learning materials out there, and it is not always needed to do them from scratch. They can also be improved or adapted. For example, you can add subtitles to existing videos or think up unique questions for discussions about the materials. Sites like Khan Academy and Ted ED offer a variety of content and topics.

4. **Establishing a routine**

With the help of a plan or schedule, it is beneficial to get into the habit of working at consistent times. Research has shown that it is better to do one task at a time because multitasking dampens the focus, and constant context shifting makes people more fatigued. It is also important to take time for self-care and downtime. Some of the more efficient ways to promote health are regular exercise, mindfulness exercises, practicing thankfulness, and taking time to include hobbies and pleasurable activities preferred by every individual.

Illustrations designed by macrovector / Freepik

3. How to deal with time – online

You might have the time management of your face-to-face sessions down to a fine art. Still, the online setting brings about its own set of constraints and quirks. Everyone is different so you will have to find your own way, but we hope you'll keep these simple guidelines in mind.

1) Focus on the learner's weekly load. How much time per week should your learners set aside for your course? Keep in mind that lectures or video materials shouldn't take up all that time – plan for assignments, individual research, and connect with other learners online.

2) Less is more. Cognitive overload is no joke, and Zoom fatigue is a real phenomenon. Our bodies are not optimized for online work, and you should accommodate that in yourself, and your learners. Shorten your lectures, learners online tend to keep their work up for less than an hour. Breaking up your lectures with short breaks every half an hour could do wonders for your learners' focus. You can always check in with them to figure out the ideal length of interrupted work. If filming videos, keep them on the short end so they don't overload the learner's Internet connection.

3) Set your priorities and keep an eye on the clock. When designing your activities, choose those that will lead to the most important learning outcome, and make them the centre of your lecture. That way, you will always have time for the most important outcomes and won't get lost in details.

4) Factor in technical difficulties. Plan for at least ten minutes to deal with technical issues. If possible, hire technical support to deal with that.

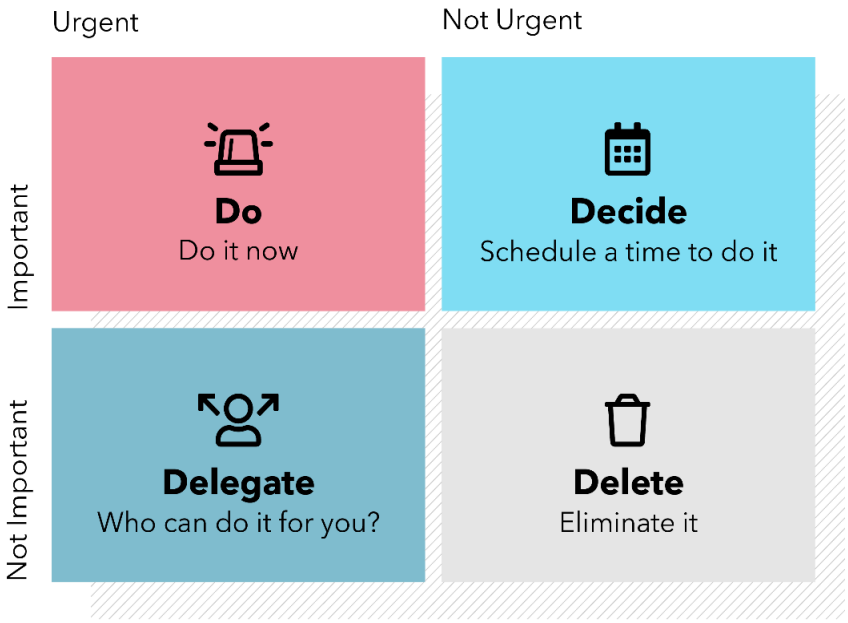
5) Plan for the worst-case scenario. We tend to underestimate the time things take, and online things tend to move slower. Always add at least 15% to your starting time frame, and have a couple of extra activities you can use if your learners surpass your expectations. Of course, you can also finish early as a reward!

6) Be honest about the online timeline. Acknowledge the weird flow of time that can happen in an online setting and communicate it to your students. Thank them for their patience when waiting for everyone to tune in or get sorted into break-out rooms.

Help yourself first: Try these tested time management techniques!

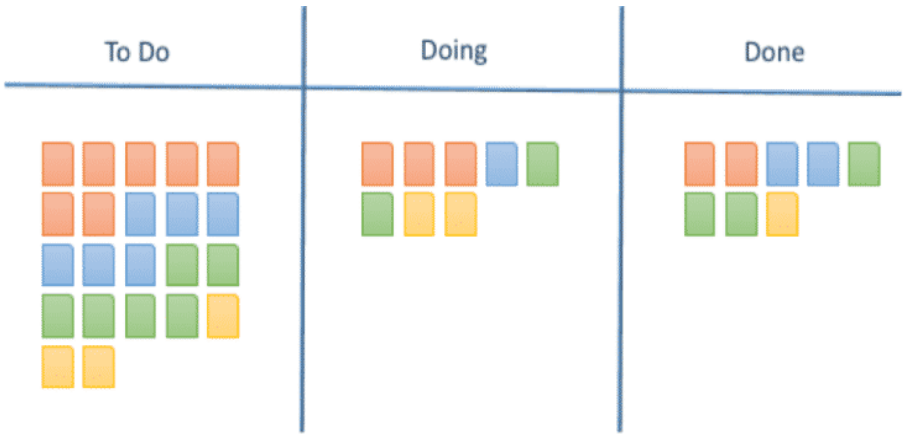
Eisenhower Matrix

Prioritisation over productivity! Divide your tasks into four categories, based on their importance and urgency. Once you do that, filter them accordingly. It is important to do this with a bigger number of tasks because constantly categorizing tasks also wastes time and energy. Once properly set, it can provide a much-needed dopamine boost!



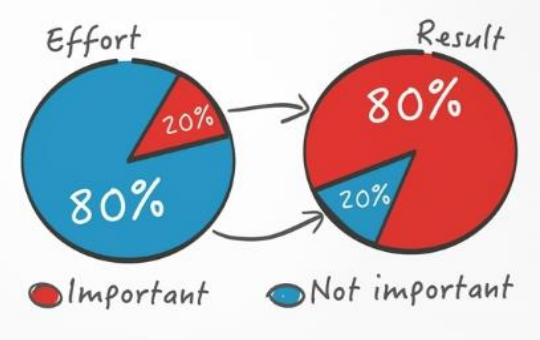
Kanban method

Kanban method is one of the most famous ones, incorporated into management tools like Trello, Asana, Todoist, or Microsoft Teams. It is a visual productivity workflow that allows you to track the progress of your tasks from those that should be done, those that are in progress, and those that are done. Don't forget you can tailor it to your needs, and prioritize within the tasks to get the most out of it!



Pareto principle

Named after its founder, Vilfredo Pareto, the Pareto principle states that 20% of your tasks will account for 80% of your results. So, by identifying that 20% and marking them as more important, you can manage your time more easily and efficiently, ensuring that you spend it on things that actually matter!

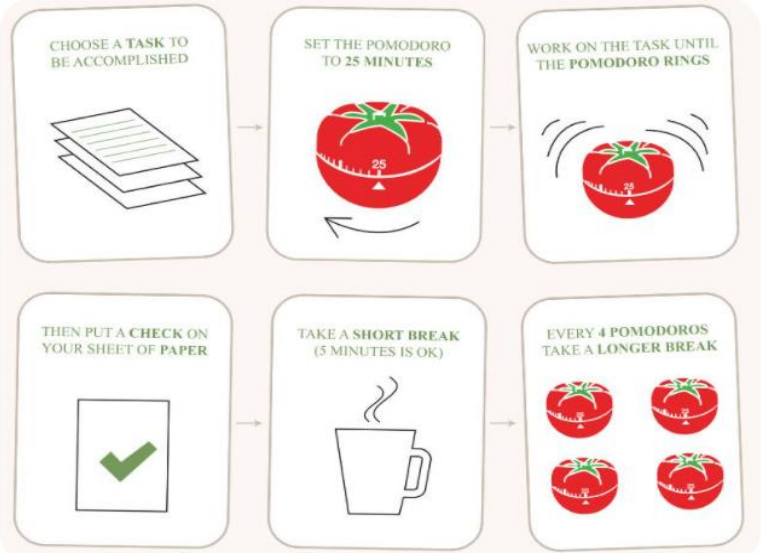


Pomodoro Technique

Pomodoro was developed by Francesco Cirillo for those who struggle with staying focused.
It consists of the following four steps:

1. Get a to-do list and a timer or an app
2. Set the time for 25 minutes and work on a task! Remember to focus on one bigger or combine several smaller tasks together. Don't multitask!
3. When the session is over, mark what you've done, and write down any other leftover thoughts and feelings.
4. Enjoy your break. After one "Pomodoro", take a five-minute break, and after four "Pomodoros" take a longer break to refresh!

Pomodoro is flexible: you can make working sections longer according to the task you are working on.



4. Time management in face-to-face, synchronous, and asynchronous education

Face-to-face education	Synchronous education	Asynchronous education
Live education usually follows its own set time frame and timeline. Non-formal education can be organized in many ways, timewise: it can last from a one-hour meeting to multiple days of workshops or experiential learning. Breaks are usually organized around mealtimes, and there is a time for "time-off", for recuperation and free activities of the learners.	Synchronous education can closely follow a live education structure, with some key differences. It is even more important to value time in a synchronous setting, so before you start your education program, set up some ground rules that emphasize the importance of timekeeping for all learners. You can gamify it by keeping a score of learners' adherence to the rule and award badges for keeping the time. Keep in mind that some learners might perpetually break the rules, so make sure you also establish reasons for exclusion in those situations. Online meetings can quickly drain a person's energy, motivation, and attention. It is important to find a way to keep your learners refreshed and focused: organise more short breaks (one every 60-90 minutes), combine different types of activities so that the pace changes every 15-20 minutes, and provide energizers. Engagement can keep the attention longer, so find ways to engage your students with feedback, individual work, and group work.	Asynchronous education leaves learners to do everything at their own pace or follows a previously set up timeline. In the self-paced program, it is important to set up a way to help participants to stay on track. Send e-mail reminders that inform them on their progress and invite them to continue! In a paced asynchronous education it is very important to have an automatized system that clearly shows learners their progress, what they learned, and what's next on the schedule. You can also set up reminders for them via mail, or various messaging options. Set up a messaging board or forum with clearly stated tasks and deadlines, where people can socialise and motivate each other to finish the tasks on time. In both cases, it is important to incorporate the "option to socialize": office hours for those who want to reach out, or a yearly event for those who want to meet other students. Also, gamification is a powerful way to keep learners engaged: show them where they stand on their "hero journey"!

5. Challenges: Managing distractions with flow

One of the biggest challenges in online education are distractions. Email, phone, notifications, other people in the room, calls, and other work-related tasks can really be a challenge for staying organized and conducting online sessions.

How to avoid distractions?

First, try to have a clear goal in mind that will help you stay on track. You can use the browser extension Mindful Browsing to remind yourself of the importance of using your time in a more mindful way.
Then, arrange your working space in a way that you can easily find your tools, and keep important ones at hand. Put away any unnecessary devices, and switch off media notifications – you can use apps such as Dewo (blocks distracting apps), or Freedom (blocks the Internet)! For a less extreme approach, set aside a specific time to work on activities that eat up your time: responding to emails, for example.
Finally, reward yourself for achieving a task or a goal you've set! The rewards should be meaningful for you with regard to your well-being and connection to the outside world. Take a walk, talk with a loved one, and spend time with your pets. Disconnect for a while!

How to use flow to help?

Once you deal with distractions, you are more open to flow. Flow is a state of deep concentration in which one's attention is fully absorbed. It doesn't mean it's not difficult or stressful – it usually challenges you and builds up your skills.
Besides managing distractions, pay attention to the following things:

- Goal clarity: try using SMART goals!

- Immediate feedback: it is important to know if you're going in the right direction, so set up a way to get feedback on your work. Check out our chapter on *Giving and receiving feedback* for more tips!

- Challenge to skills ratio: your goal should challenge, but not overwhelm you.

6. Questions for reflection

1. *Which time management technique sounds like the best fit for your learning style?*

2. *Think about the ways you could make the waiting time for technical difficulties seem shorter. Make a list and choose the top three options you can use!*

3. *Is using time efficiently important to you? Why, or why not?*

7. References and resources

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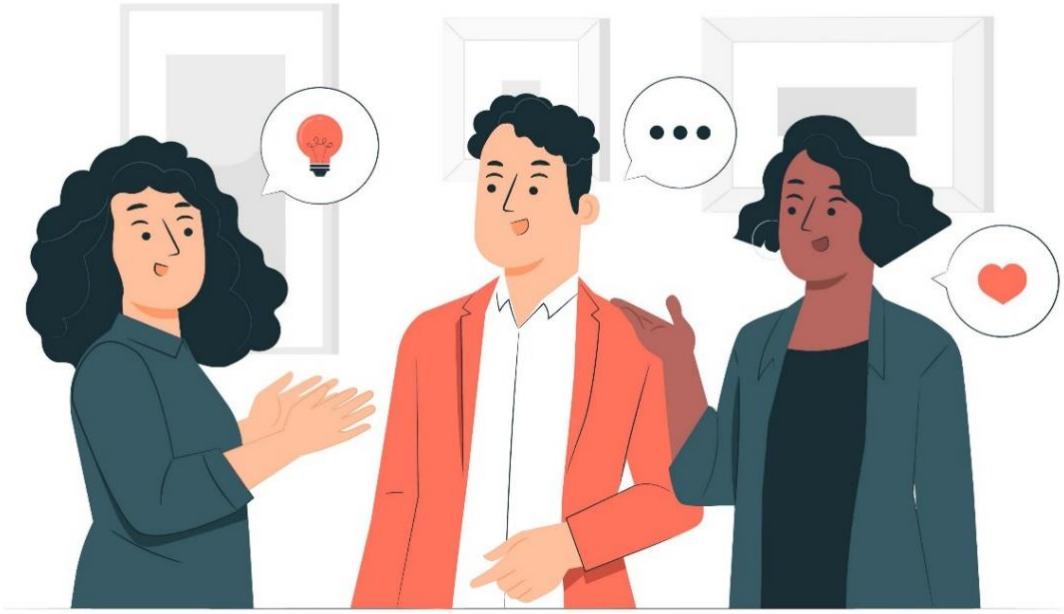
Chapter 13: Giving and receiving feedback

The chapter outlines the characteristics of effective feedback and the differences between giving and receiving feedback in in-person and online educational settings. After you explore the content of this chapter, you should be able to:

- ✓ Explain the role of giving and receiving feedback in learning,
- ✓ Differentiate between valuable and harmful feedback,
- ✓ Compare giving and receiving feedback in face-to-face, online synchronous, and online asynchronous learning.

The chapter includes the following sections:

1. Why is feedback important?
2. Educator as a giver and receiver of feedback
3. Tips for giving and receiving effective feedback
4. Feedback in face-to-face, synchronous, and asynchronous education
5. The challenge of receiving feedback in an online setting
6. Questions for reflection
7. References and resources



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1. Why is feedback important?

As social species, we continually receive and give feedback, even if we are not aware of it. Feedback lets learners know where and how they can improve by allowing them to confirm, correct, refine, and reshape their knowledge, beliefs, or habits.

Effective feedback is a vital aspect of learning. Simply put, feedback makes learners do a better job! They are more active during the learning process, less distracted, more focused on their goals, and more likely to keep on track and reflect on the ways they can improve their work. Also, effective feedback can boost the learners' motivation and help them develop effective learning strategies and skills. Take the opportunity to reflect on how you give feedback to learners and what they would find most useful.

Not all feedback is valuable

Giving good feedback is one of the most powerful ways you can improve learning. However, not all feedback is valuable.

Most of us know what it is like to be on the receiving end of bad feedback. We might feel like we are under attack, put down, or invalidated as a person. **Bad feedback is usually directed at a person in general**; it is unhelpfully vague and does not suggest what should be improved. It often comes from the needs of “the critic” rather than the person receiving it.

> The presentation was pretty bad. It's like you don't take this class seriously. Being lazy will just hinder your progress!

On the other hand, **effective feedback** makes a clear distinction between the person and particular attitudes or work that is being examined with a critical eye. The person is always regarded as valuable, but that does not mean only praise should be given. In fact, it could be perceived as false and condescending. Finally, any feedback should be heard in a **supportive context** where everyone present can have a feeling of trust towards one another.

> The presentation was immersive and contained useful examples. On the other hand, it would improve by highlighting and focusing on key topics, and making the text easier to read by changing its color.

2. Educator as a giver and receiver of feedback

Educators have a double role with feedback. They give it to the learners to help them keep track of their progress, and they receive feedback from the learners concerning their work or course in general.

Giving and receiving feedback may seem similar, but they depend on different skills and behaviours.

How to form and present feedback to your learners

Effective feedback should be based on the following three stages:

1. **Feed up**: makes the learning goals clear from the start.
    - For example: *In this lesson, you will reach the following learning goals: You will be able to differentiate between valuable and damaging feedback on examples, you will be able to list at least three ways you can make giving online feedback more effective, and you will develop a way of making receiving feedback from learners clearer for you.*
2. **Feedback**: monitors and assesses the progress towards the set goals.
    - Instant feedback for self-assessment: *Mark these feedback examples as either useful or damaging. How many did you get right?*
    - Peer evaluation: *Develop your own schedule for giving feedback to your online learners. It will be peer-reviewed using previously defined criteria.*
    - Direct feedback: *Your essay about challenges and possible solutions for receiving online feedback covered two important topics, and included a detailed discussion on 2D/3D body language. Solution for learners without the camera was underexplored: what can be used as a feedback system besides the Thumbs up emoji?*
3. **Feedforward**: gives directions and suggestions on where to go next.
    - *Now when you are armed with basic knowledge about giving and receiving feedback, it is time to personalize it to your own needs. Take into consideration the features of the online tools you use, as well as your learning style, and think about how you can apply them to your teaching practice.*

Furthermore, **keep in mind different levels of feedback**:

1. **Work-level** – „What?“: immediate feedback that focuses on the learners' performance at the work or task at hand. While useful for monitoring progress, it does not give information for improvement and cannot be generalized on other tasks.

    ✓ *That's the correct way to use the chat feature!*

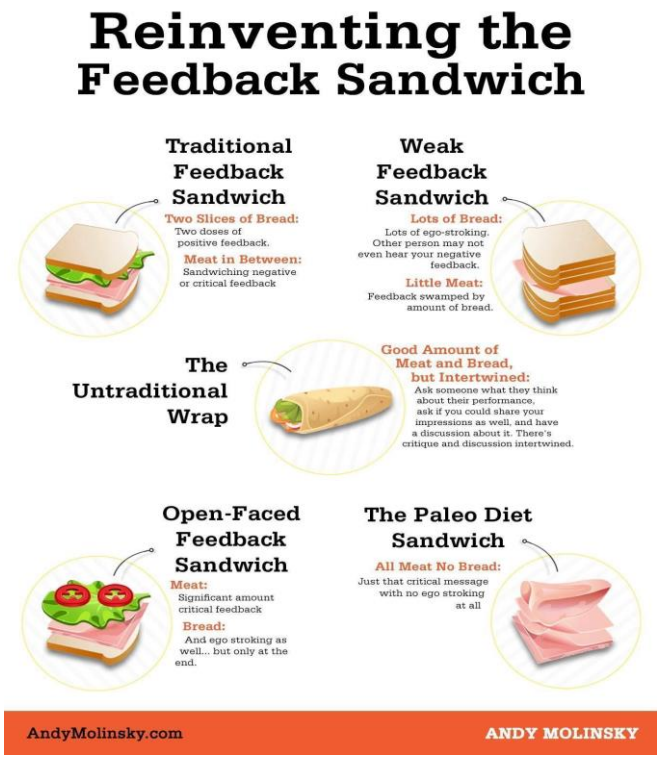
2. **Process-level** – „How?“: feedback that focuses on the process a learner uses to complete the task. It can be generalized to all learning, not just the task at hand. It should be given after the task in question for younger or new learners. Giving this kind of feedback could be longer, for example, during the reflection period.

    ✓ *You might find it easier to concentrate on the task at hand if you do short five-minute breaks every twenty to thirty minutes.*

Giving and receiving feedback online

Giving and receiving feedback is **especially crucial and more challenging in an online setting**. So, how can you plan and implement it effectively?

1. First, you can offer feedback during one-on-one meetings, group work, or presentations.
2. Second, you can give written feedback on the students' work.
3. Third, students can provide feedback to you and their peers.



3. Tips for giving and receiving effective feedback

Tips for giving effective feedback

The key is to have opportunities to give feedback that fosters the growth mindset and validates the person while targeting their specific work and actions.

→ **Focus on the goal.** Be specific and descriptive while considering the learning goals. Base your feedback on concrete and observable behaviours or tasks. Describe your views, and do not make presumptions about what the learner should be feeling or doing.

→ **Focus on the message.** Be realistic, timely, and direct. Always focus on the behaviour and offer feedback on the things that person can change. Time your feedback accurately and be honest but considerate.

→ **Focus on fostering a positive relationship.** Be positive and do not compare. Do not focus only on the challenging aspects and highlight only those things you genuinely appreciate and incorporate a "working on strengths" approach. To foster a growth mindset and intrinsic motivation, always treat each person's work as their own, not part of some supposed competition with others.

→ **Focus on the self**. Be diligent and aware of your internal bias. Check if your feedback truly reflects the work or task at hand. Is it an accurate reflection of what you want to express? Being in a heightened emotional state could distort your feedback. Feedback is not a tool to deal with your own negative emotions at the expense of others. Finally, do not overload the person: focus on one thing at a time (for example, one thing to admire and one thing to correct)!

→ **Provide recommendations and solutions.** Constructive feedback should include a specific solution or recommendation.

Tips for receiving feedback

- ✓ **Be explicit** when asking for feedback. Indicate what kind of feedback you want.
- ✓ **Use active listening**. Listen carefully to the person giving feedback and ask questions for clarification if necessary. Make sure you understand what is being said and summarize the message to see if you understood it correctly. Also, keep your attention on the person giving you feedback, and do not forget about body language! Carefully examine the other person's body language to pick up cues (if possible), and be aware of the messages you are sending with your body language.
- ✓ **Keep an open mind**. Try to avoid putting up barriers and concentrate on being as receptive to new ideas and different opinions as you can. Don't be defensive - engage!
- ✓ **Reflect and implement**. Assess the value of the received feedback and be aware of your reaction to it. Then, decide what to do about it. You can ask for a second opinion from someone else if you are not satisfied.

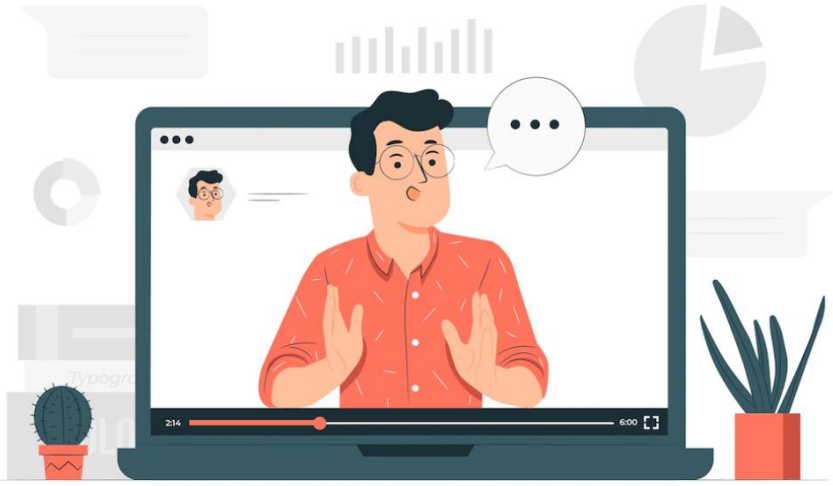
TIPS FOR ONLINE FEEDBACK: Four ingredients for effective online feedback

1. **Maximize the use of technology**: use multiple types of communication. Use quizzes and polls instead of tests and make it fun (visuals, GIFs, emojis, memes, etc.). Use email, classroom messaging, the announcement section, instant visual feedback (thumbs up works wonders!), pre-recorded audio or video messages, and set up „online office hours“ where the learners can reach you for synchronous contact.

2. **Use rubrics, templates, and automated responses**: using scoring tools is much faster than the „formal“ way of assessing work and provides instant feedback. Use a combination of written feedback, audio, and video materials. Think about gamifying your feedback! Apps like Google Forms or Mentimeter can bring new ideas to your work.

3. **Have a system**: give timely and regular feedback. You can schedule giving feedback so that your learners know what to expect. For example, you can provide feedback within 72 hours of finished assignments. You can schedule your emails in Google or Outlook, or Apple. Agree with your learners on the timeline at the beginning and manage their expectations. Use multiple types of feedback to maximize gains: learner self-reflection, peer review, group feedback, teacher feedback, and automated feedback.

4. **Create a feedback-rich environment**: vary the feedback depending on the assignment, group size, and temperament. When starting your program, start with an opening round where everybody gets a chance to say something personal and subject-related. Always close with a reflection circle (*What is your takeaway from this lesson? How do you feel?*) and celebrate individual or group achievements. Think about the tone of your feedback and the ratio of positive and “needs to be improved” feedback.



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4. Feedback in face-to-face, synchronous, and asynchronous education

Face-to-face education	Synchronous education	Asynchronous education
In face-to-face education, you can combine more ways of giving feedback to your learners. You can give immediate feedback in many ways: learners can see if they are doing well just from your body language! It is easy to set additional time for one-on-one sessions with the students and engage them in peer-to-peer evaluation.	In synchronous education, it is important to utilize more channels of giving feedback to your learners. Remember that not all learners will be present in the same way (camera on/off)! Keep it short, give immediate feedback, and use all the options your app of choice offers. In an online setting, feedback also becomes a way of building relationships with your learners. Use it often, both on an individual and a group level. Focus on giving positive feedback to as many learners as possible for their individual contributions so they feel motivated to engage. Motivate all learners to give feedback to each other by using emojis, thumbs up, and similar visual stimuli.	It is most important to communicate a feedback plan with your learners in asynchronous education. Set up automatic feedback using quizzes and other self-assessment tools directly in your lectures or materials. Create opportunities for peer-to-peer feedback. You can make a peer-to-peer grading opportunity and set up a forum or a messaging board. For example, you can upload student tasks to Padlet and ask the group to react to the ones they like the most. Think about providing feedback through video or audio! While still not perfect, the tone of voice and body posture provide more information than a Word document. You can use Zoom, Google Meet, or Microsoft Teams to meet and communicate with your learners, and TechSmith Capture to record yourself while giving feedback on specific learner's work. Take the time to meet learners for individual assessment – set office hours for face-to-face meetings.

BODY LANGUAGE: keep your stance open. Use gestures to accentuate and make your feedback genuine – people judge others who don't gesture to be less honest. Be careful not to intrude on the learners' personal space because it can make them stop listening and focus on the uncomfortable situation. Make eye contact to emphasize important feedback, but be mindful not to single out individuals for long periods of working in a group or class setting. Use a neutral tone of voice and repeat the important bits you want the learner to remember.	**BODY LANGUAGE:** It is important to use the camera as much as possible.You can share your screen while talking about the content, but it is important that your learners can see your full face when receiving feedback from you. You won't be able to gauge learners' reactions if you are looking directly at the camera but try to look directly at the camera toward the end of your talk. When gesturing, bring your hands up and exaggerate slightly to catch the movements on camera. However, don't move your hands directly in front of the camera if you want your learners to pay attention to the message. Try to make your talking interesting by modulating your pitch, loudness, and rhythm more than in face-to-face education. When using silence, make it clear it's not because of technical issues! Try making your feedback sessions distinct in some way by changing your backdrop (for example, change your Zoom background).	**BODY LANGUAGE:** The written word is stripped of body language cues that make up for more than 70% of communication. Use digital tools to make your feedback more visual and provide some of the cues usually reserved for face-to-face meetings. Use an emoji 😃, underline, color, link a song, a photo, or a video that conveys your emotions.
LANGUAGE: Keep your feedback tied to a topic or task at hand. Going up-and-personal is best to be avoided, except when directly asked.	**LANGUAGE:** Use a more straightforward sentence structure. Repeat important information. Accompany your sentence with an emoji, a song, or visual or auditory aids.	**LANGUAGE:** Use clear sentence structure. Restrain from using metaphors, sarcasm, or using a lot of exclamation points. Never use caps lock, as it may be interpreted as a shout. Use more visuals: emojis, pictures, GIFs, etc.

BALANCING THE INDIVIDUAL WITH THE GROUP: Give immediate feedback on individual contribution and group feedback at the end of the session.	**BALANCING THE INDIVIDUAL WITH THE GROUP:** Use short bursts of immediate feedback for unique contribution - give a thumbs up, post a reaction, or send a person a short personal chat message. When giving group feedback, ask for similar kinds of engagement from your audience, so they can join in and celebrate their successes.	**BALANCING THE INDIVIDUAL WITH THE GROUP:** Set up a way of giving individual and group feedback. It is easy to feel isolated and alone in asynchronous education so create opportunities for group feedback to foster the feeling of a group: open a forum, or make a chart that shows group data (be careful not to single out anyone, though)! Make a graph that visualizes group effort and record a message for everyone!

5. The challenge of receiving feedback in an online setting

The biggest challenge for online educators is receiving feedback from their learners. We can't guess a reaction and body language while the camera is turned off or while our asynchronous learners are going through the online course at their own pace.
First, think about the way you want to receive feedback. Do you want written feedback? Are you satisfied with marks on a set of criteria? Would you like to organize a focus group of your learners to get the feedback you need?

- **Tip**: If there is time, combine different strategies! Gain immediate feedback by directing your learners to put emojis, short messages, or evaluation forms with simple questions at the end of each session. Do a more thorough feedback session at the end of the course with a longer evaluation form, or gather some of the learners for a talk.

Second, set up a set of criteria for yourself. Which skills do you want to work on? What do you consider requirements for a successful online educator?

- **Tip**: You can set up your learning plan and/or use skill frameworks (for example, The European Framework for the Digital Competence of Educators (DigCompEdu).

Third, communicate with your learners. Do you want them to fill in an evaluation form at the end of each session or a whole course? What kind of language should they use – formal, informal, emojis? Will it be anonymous?

- **Tip**: Engage somebody else in leading the process, so your learners feel free to give feedback! Always provide the chance for both anonymous and more in-person feedback from more motivated learners.

6. Questions for reflection

1. *Think about the most impactful feedback you got. Would you consider it effective, and why? Can you apply some of the things it did well?*

2. *Do you give your learners feedback more than once? What purpose does the various feedback serve?*

3. *Do you use a protocol or a plan that details the way you are using feedback to improve your work? If not, what would you put in it?*

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IN CONCLUSION

Dear educators,

Thank you for your time, effort, and trust. You have come to the concluding pages of our handbook. We hope that the chapters provided new information and insights and helped guide you on your way to becoming a more confident online educator. We also hope the resources will help you improve your soft skills, as well as your learners' soft skills.

In the end, we would ask you to take a moment and reflect.

- *Which new concepts did you encounter in the handbook?*
- *Which material did you use, or will you use in your educational activities?*
- *How has new knowledge impacted your feelings and attitudes while preparing and conducting an educational activity?*
- *Which comparison of face-to-face, synchronous, and asynchronous education has intrigued or surprised you? Why?*

We wish you luck on your journey to becoming the online educator of your dreams!

CREDITS

Who are the authors?

The handbook is a result of the cooperation between **Non-formal Education Youth Centre Sunny House** (Georgia) and **Association Delta** (Croatia), with the help of other partners from the TRENDSS consortium: Yes You Can! Training and Coaching Kft. (Hungary), Fundacja Culture Shock (Poland), NEA (Romania), and Helix - Social Innovation Hub (Greece).

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