

# Online Collaboration Guide for Facilitators

A resource for using digital technology for  
collaboration and learning



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# Introduction

## What is this document's purpose?

Online collaboration<sup>1</sup> is an essential skill for working and learning in our connected world. This guide serves as a resource to make online collaboration seamless and productive. Not only are the guidance and tools in this document intended to be helpful for individuals working collaboratively with others on a project or task, they also aim to equip facilitators of meetings, workshops, learning sessions, and trainings with resources to create an optimal environment for learning and working collaboratively in the digital age.

This guide was originally developed as part of [IREX's Employee Essential Skills Suite](#), a comprehensive training resource that prepares individuals for successful employment and self-employment. It does this by developing key soft skills that employers consider essential. We have adapted this guide to offer it to a broad audience to help diverse types of facilitators within institutions or communities leverage digital technology for effective work, learning, and collaboration.

This guide contains references to many tools, some of which you might already be familiar with. The purpose is *not* to oversaturate you with more digital tools than you already use. Rather, our goal is to help you distill, prioritize, and select which tools to use to support your online work and learning—whether you are a remote worker, facilitator, or trainer. It's our hope that this resource can help you be even more intentional and strategic about which digital tools to leverage for your needs.

## Who is this guide for?

This document was created for people who facilitate two types of activities:

- 1. Professional collaboration:** By this we mean facilitating online collaboration with others—for instance, by hosting online meetings and workshops or by engaging in online teamwork with individuals in different geographic locations.
- 2. Trainings and other learning experiences:** This involves creating and facilitating learning opportunities (such as trainings, workshops, and webinars) for participants.

The resources in this guide require familiarity with working with and communicating through digital technologies. They also require a reliable internet connection.

Please note that while many of the resources in this guide can be used for individual work as well as teamwork and collaboration, this guide primarily focuses on supporting individuals who will use these resources and tools to work with others and facilitate online meetings or trainings.

## Who created this guide?

IREX created this guide and adapted it for general release in March 2020.

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<sup>1</sup> In this guide, “online” refers to technologies that involve internet access, while “digital” refers to technologies that do not necessarily connect to the internet.

## How is this guide organized?

- 1 Section** — General considerations to take into account when designing online collaboration experiences.
- 2 Section** — Practical tips and examples for using specific tools. This section highlights a few tools that are in the next section.
- 3 Section** — A diagnostic to assess digital needs and inform your decision about the digital tools you will use.
- 4 Section** — A table of tools, organized by the functions they serve. Jump to this section if you're looking to get started quickly.
- 5 Section** — List of additional resources for strengthening your online collaboration and facilitation.

## Section 1

# Guidance for deploying tech for online collaboration and learning

### General guidance

There is cautious optimism about the role that technology can play to support online collaboration and learning. Digital tools facilitate remote and cross-cultural collaboration, enable synchronous (real-time) and asynchronous interaction, and support digital proficiency through exposure to new tools. Technology also allows for learning efforts to be adapted and personalized according to the needs of an individual, as well as for nearly real-time feedback to enable reflective practice by both learners and instructors. While there are many benefits of online collaboration and learning, it also presents challenges. Online collaboration and learning can exclude people who don't have access to devices or the internet, online platforms can sometimes be expensive to use, and learners may not have enough digital literacy to full participate. Fortunately, there are ways to mitigate at least some of these challenges.

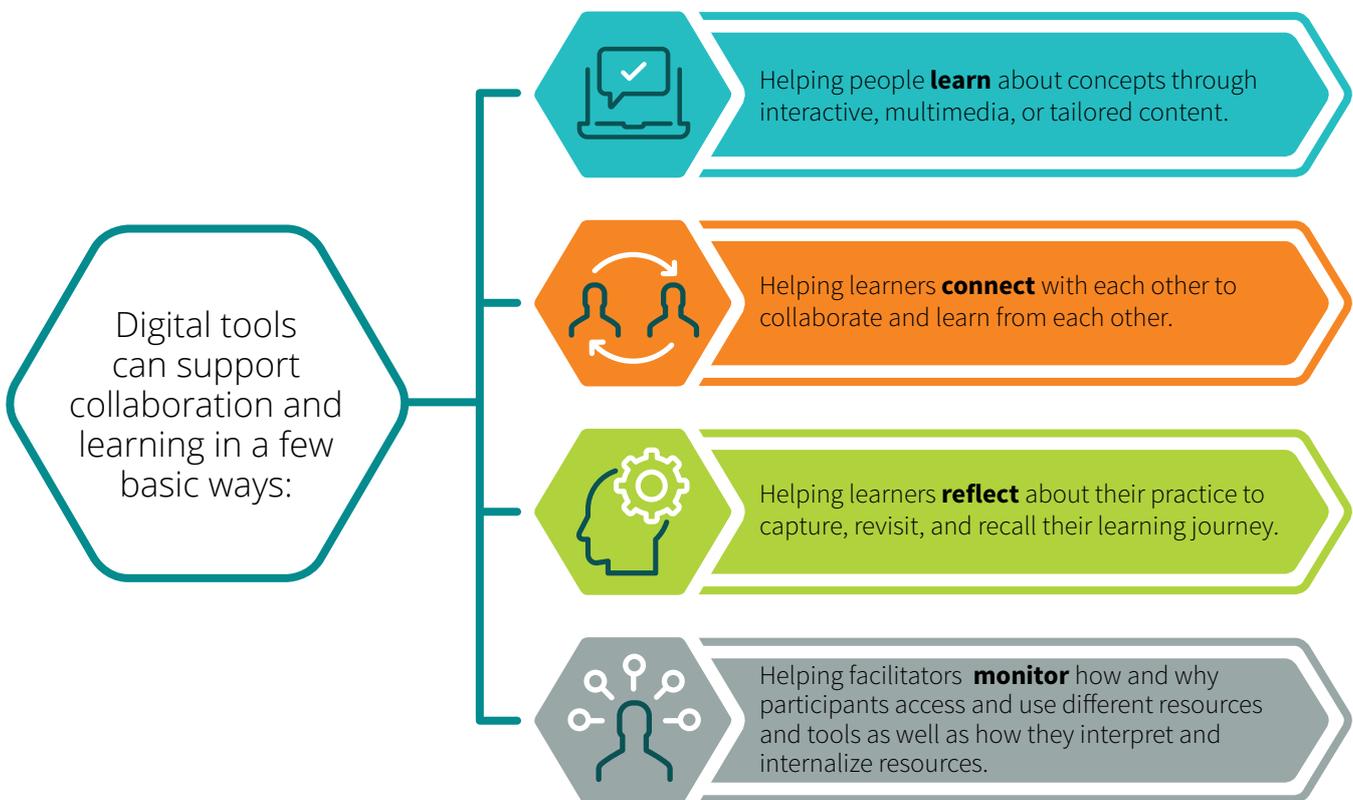


Table 3 has a list of tools sorted by what functions they serve. Use the icons in each row to map those tools to one or more of these four purposes. Consider your goals in order to select tools that help you meet them.

Also consider the context in which the tool will be used. Every context has its own unique needs; for instance, a group of youth in the United States may need a different tool than a group of adults in Moldova would need. In addition, a participant's digital literacy level, type of digital device, or even their location or the amount of time they have, are central for determining the best tool to use. To help apply digital tools to specific contexts for working and learning, the following tips might be useful.

## Tips

Technology's potential to support working, learning, and collaboration is only as powerful as the way in which it's applied. For example, when deciding on a tool to support a specific function, we must evaluate whether people are more likely to access content from mobile or desktop, whether they will be willing to absorb the costs of downloading large files like audio or video content, and how comfortable they are with using familiar personal platforms, such as WhatsApp or Facebook, for professional purposes. These “analog” components determine the success or failure of digital tools.<sup>2</sup>

### For professional collaboration and learning:

- ▶ **Select the tools based on your audience—keep it simple:** Use the digital needs diagnostic in this guide and review the guide's suggested tools to select tools that would fit your needs and your audience's needs. Set up the tools and prepare to use them, making sure to give your participants the support they need to use the tools as well. Keep your approach consistent and as simple as possible so it will be easy for participants to join the activity, engage in it, and strengthen their capacity to use the tools. Consider how you might need to adapt based on device limitations, internet accessibility, or other constraints. For example, if connectivity is not strong, a participant or facilitator might have to disable their video or take other actions. If participants only have access to mobile devices, prioritize mobile tools such as WhatsApp over desktop-only platforms.
- ▶ **Digital tools work when everyone buys in:** If you're in a workplace, assume that employees will hesitate to use a tool that their supervisor is not already using. Map key people who you need to get onboard and work with them closely to ensure they're prepared and committed to using the platform. If possible, track individuals who aren't as engaged and follow up with them to offer training or solicit feedback on what's not working. In an educational setting, learning facilitators or trainers have a key role to play in selecting tools and consistently using them.
- ▶ **Take collaboration seriously:** Especially when you are repurposing an existing tool, it will take time and effort to train participants on how to use that tool. For instance, if you're hosting a discussion group, book club meeting, student project, or “peer-to-peer learning session” in a WhatsApp group, make sure everyone is familiar with important features, like replying to specific messages when sharing audio messages.
- ▶ **Manage expectations:** As most product designers will attest, it's rare to deploy a digital tool that everyone loves to use. The same applies to the work and learning contexts. It's your responsibility not to ensure everyone is thrilled with the platform but rather to ensure that you are prepared to help those who are struggling. Before deploying the tool, think about who might struggle with the change or resist it. Determine whether they're critical to the situation, how you can support them, and how you can help them see the benefits of the tool.
- ▶ **Be mindful of access, safety, inclusion, and respect:** As is the case for an in-person collaboration or learning session, it's essential to consider access, safety, and norms.
  - » **Access:** Choose a platform or tool that you think participants will be able to access at home or on the go. Think about potential data costs before asking participants to upload data-heavy content like audio or video. Where possible, provide options for content that participants can access in low-bandwidth environments and at flexible times.
  - » **Safety:** Scan the privacy policies of the tools to evaluate whether they're appropriate for your audience and context. ([Terms of Service; Didn't Read](#) summarizes many popular policies.) Consider accessibility challenges. For example, could some of the participants have low

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<sup>2</sup> World Bank, World Development Report 2016: Digital Dividends (Washington, DC: World Bank), <http://documents.worldbank.org/curated/en/896971468194972881/pdf/102725-PUB-Replacement-PUBLIC.pdf>

vision, limited vision, or hearing loss.<sup>3</sup>

- » Inclusion and respect: It's also important to consider how people behave online. As the facilitator of the collaboration or learning space, it is your responsibility to ensure that you set the right tone for inclusion—an environment that is supportive of all participants and learners. (Refer to youth [brave space norms](#) and “do no more harm”<sup>4</sup> principles.) Invite group participants to develop a shared code of conduct—something simple, like core principles of respecting opinions and debating ideas and not people (refer to [Netiquette rules](#)). Many of the same principles you apply in person should apply online, therefore it is useful to remind participants about this. Be consistent about referring to this code of conduct and intervening thoughtfully when behavior falls outside of the code.
- ▶ **Moderators matter:** Having a dedicated moderator—someone who can nudge along the conversation, share discussion prompts, and manage conversations so they adhere to agreed upon norms and goals—is one of the most important success factors for any online community. Take facilitation seriously: prepare a roadmap of discussion prompts in advance to share (having a consistent rhythm strengthens engagement), ensure each group has a dedicated or rotating facilitator, and have a backup plan for when conversation on a topic goes silent or stale (refer to Appendix's [“Prepare, Execute, Follow Up: Essential Tips for Virtual Facilitation”](#)).
- ▶ **No tool is perfect:** Remind yourself and participants that any tool will have its strengths and weaknesses. When deploying a tool, provide guidance on how to use it and even share its limitations. As a facilitator, knowing your audience will help you prepare with the tools that enable you to meet their needs as much as possible. Nevertheless, digital tools sometimes fall short of meeting all the needs of participants, so encourage your participants to create their own solutions when tools fall short.
- ▶ **Be mindful of digital security:** Ensure that you and the participants understand the security features of the platform, such as what personal information they will need to disclose and have available to other participants and what end-to-end encryption is built into the tool. If sensitive information will be shared, use a platform that is capable of protecting the information from participants based on evidence.
- ▶ **Build community:** Collaboration and learning happen socially. Teamwork and peer learning are key approaches that contribute to productivity and learning. Where possible, create opportunities for participants and learners to build community, get to know each other as individuals, and demonstrate support.
- ▶ **Be mindful of dependency:** Be mindful of the risks associated with using a third-party tool. The service could be shut down or blocked at any time. One strategy to mitigate this risk is to back up content periodically. Another is to provide learners with an analog alternative. (For example, “If Slack is down, just write down your reflection on paper, take a picture, and share it later when it's back online.”)

### Tips relevant for training and learning facilitation:

- ▶ **Follow best practices to design for how people learn:** The way people learn applies online like it does in person. Think through how thoughtful pedagogy, guided practice, participatory collaboration, and independent reflection translate online. Find ways to incorporate “warm-ups,” tasks that can be done offline, and points for feedback to support learning. You can often use digital tools to design the best learning experience as long as you start with your audience and their learning needs.

<sup>3</sup> Microsoft is one of the larger-sized leaders in making content on their tools accessible.

<sup>4</sup> Learn more about these principles through the [CDA's website](#). For conflict sensitivity and do no harm approaches with gender mainstreaming, visit the United States Institute of Peace's [Gender Inclusive Framework](#).

- ▶ **Design for a variety of participants:** Where possible, do an assessment about the digital literacy of your participants to anticipate who might need more support so that you can offer it. It is useful to provide support at the beginning so that technology issues don't become interpreted as interpersonal issues. In most digital communities, there will inevitably be core learners who surface as leaders of participation (a small fraction), learners who follow the action and stay involved (a slightly larger number), and learners who remain on the periphery (the majority). Consider and value all different types and prepare a balance of activities that address everyone.
- ▶ **Track engagement:** Digital tools can help you to track how learners engage—not to “name and shame” low performers, but to help you learn what content people care most about. When sharing a URL, consider using a tool like Bitly so you can see whether people follow the link. Use tools that let you see when a message has been received or read. Train learners on how they can react to posts (such as replying with emojis) to acknowledge their interest in a visible way you can measure.

We hope these tips are helpful for designing your online collaboration or learning experience. These tips are only useful when executed by yourself or team members who have time (or intentionally dedicate time) to develop the expertise to use technology effectively. In the next section, we will review examples of how you can bring these guidelines to life. Remember that the real impact come from teams who invest time and effort to use technology for collaboration or learning.

## Section 2

### Examples of tools

Digital tools can help collaboration and learning in specific ways, but sometimes it's hard to imagine how a tool can help a specific purpose. This section contains examples of how some tools—a small sampling of many options—can be used to support collaboration and learning objectives. This is not an exhaustive list; rather, it provides some examples of activities your team can do using various tools.

You will notice that we share use cases of a set of tools for specific contexts. In some instances, determining which tool(s) to use means assessing which tool(s) can complement other tools to fulfill your digital needs. When relevant, combining tools for simple and productive working and learning experiences can bring the recommendations in this document to life.

#### Example 1: Fostering ongoing dialogue



##### Whatsapp

WhatsApp is a powerful and underutilized tool for online collaboration and continued learning that can be accessed on mobile devices and on a computer. In most locations, this tool can be used with lower internet or data cost relative to other collaboration tools. IREX has prepared a primer that you can use [“Using WhatsApp for Communities – Tips and Resources.”](#)

*For professional collaboration*

Using a chat app like WhatsApp shouldn't be done in isolation as a one-off activity. Consider creating a group to foster ongoing discussion. For instance, if your group meets weekly, you can use WhatsApp to ask follow-up discussion topics throughout the week between meetings. Each group can focus on specific topics or teams.

*For learning and training*



Source: freepik.com

In learning contexts, you can encourage participants to share their reflections using audio on their messaging app.

For instance, Facebook Messenger and WhatsApp can be used to send voice messages where participants reflect on these questions, or respond to questions prompted by voice messages sent by the trainer. As in professional settings, peer-to-peer groups can be formed for ongoing discussion or teamwork.

For groups smaller than four, WhatsApp also offers audio and video conferencing capabilities.

Remember, digital forums like chats are only as successful as the moderators who keep nudging the dialogue along. Read the primer's "General Guidance" section where we share tips for more details about these and other important considerations.

## Example 2: Surveying participants for feedback

You can create a quick online poll for participants and share the results with the group.

### DirectPoll

[DirectPoll](#) is a good free tool that doesn't require you to create an account. You can create and edit polls, send a unique link to others to submit their "votes," and share a separate link that visualizes the results.

Here's an [example of a poll](#) and an [example of the results](#).

This could help participants visualize which responses are more common among fellow participants, both in a physical room (by showing the poll results on a shared screen or projector) and remotely (since participants could see the results on their own devices).

Consider using this along with another tool for collaboration. For instance, if a peer learning circle is on WhatsApp, share a DirectPoll link in that group to invite learners to vote on the next topic for their learning circle, or on the extent to which they agree with an assertion someone has made.



Source: [directpoll.com](https://directpoll.com)

## Example 3: Whiteboarding and brainstorming

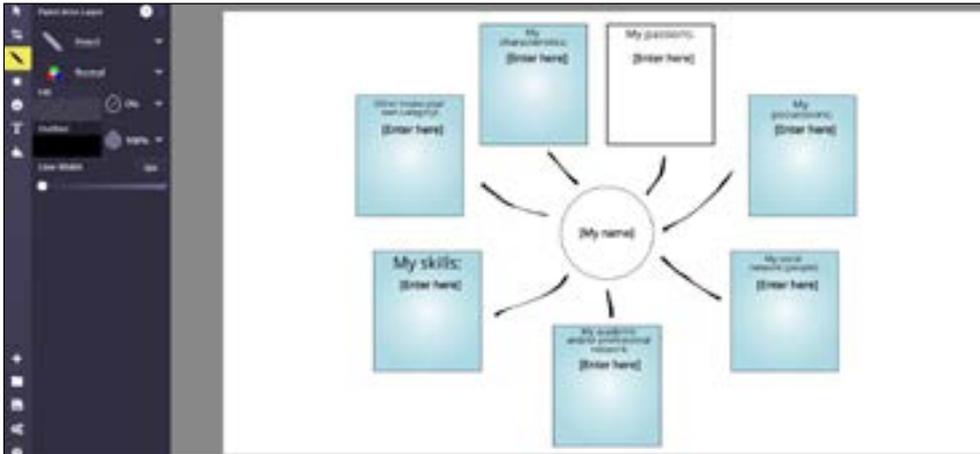


### Sketch.io

When you want people to collaboratively fill out an existing template, like a digital collaboration page or business model canvas, invite participants to do so using an online tool that lets participants use premade templates.

*For learning and training*

The free tool [Sketchpad](#) from [Sketch.io](#) can be useful here. For example, you can provide them with a digital personal asset map template that they can load into Sketchpad and edit themselves.



Source: [sketch.io](#)

Once they're done, they can export the map as an image to use elsewhere or share with the class. They could also save the Sketchpad document to return to it later and reassess their assets.

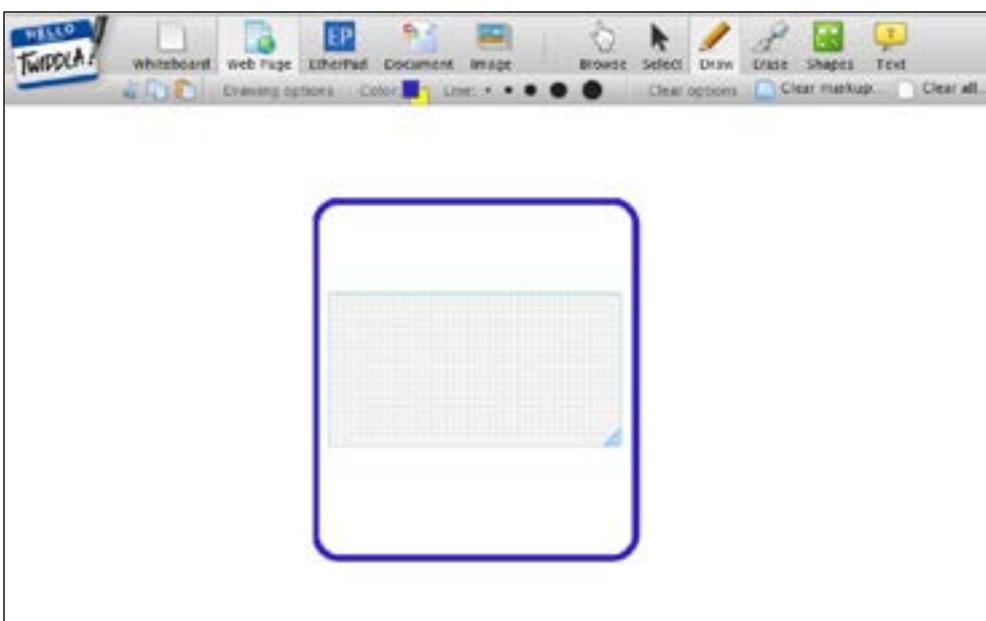
Please review the Sketchpad template for reference. It uses a personal asset map as an example.

### Twiddla



Flip charts are useful for sharing ideas in a common space. If your participants are in remote locations with internet connections, you can recreate the experience of using a flip chart online.

[Twiddla](#) is a free online tool that enables real-time collaboration for drawing and typing. The free version lets people use the same "whiteboard" space for 20 minutes without logging in.



Source: [twiddla.com](#)

Twiddla works well as a complement to online meeting. For example, a group could join a videoconference with each other and create a Twiddla whiteboard for each team member to map key concepts as they come up during the discussion. Team members can edit simultaneously to build on each other's ideas.

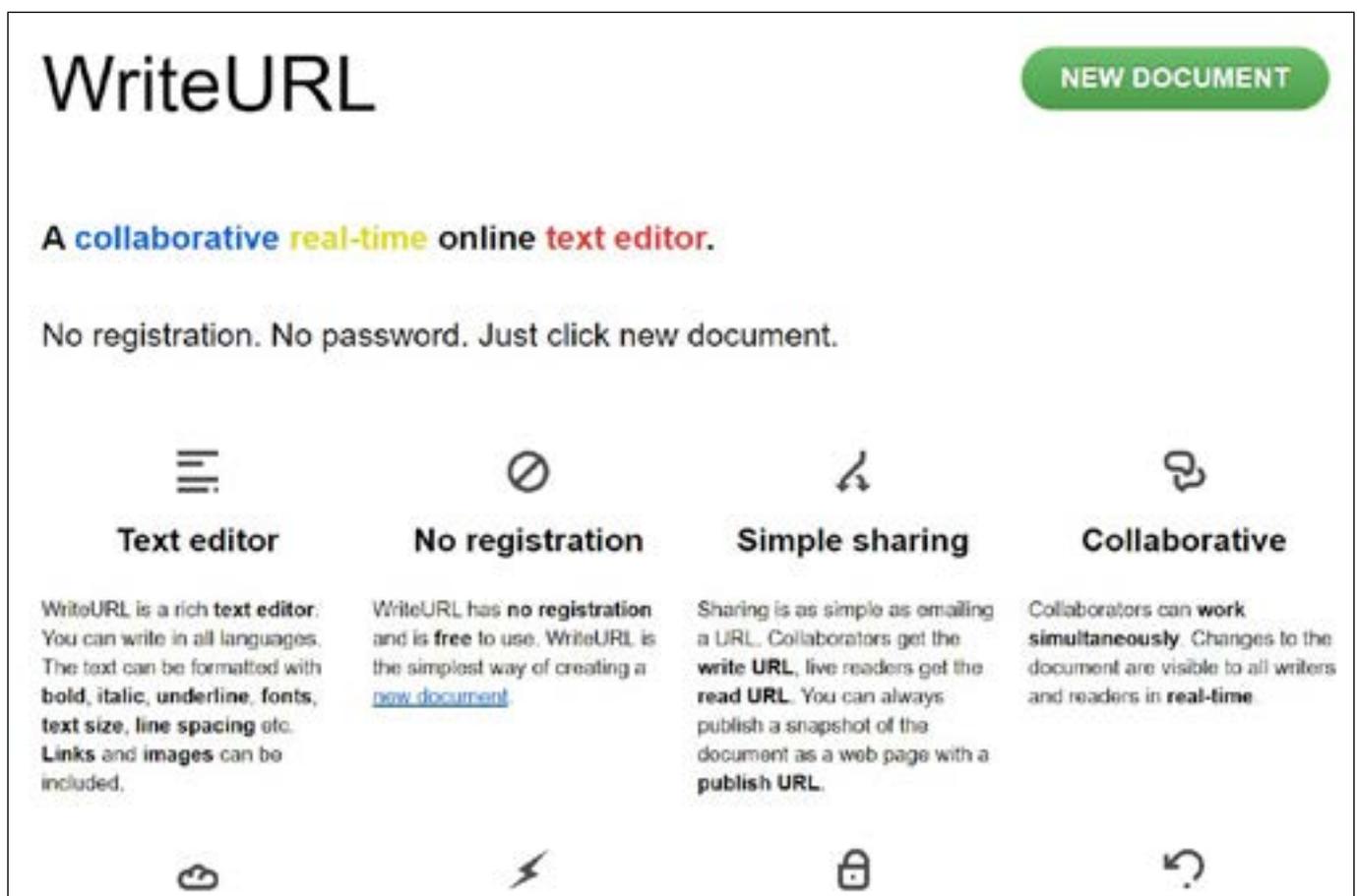
## Example 4: Taking notes

### WriteURL

When you need people to collaboratively develop a document, tools like [WriteURL](#) can be useful. It lets multiple users type simultaneously on a notepad in a browser.

For example, team members can each share a reflection and take turns recording them in WriteURL. They can share the link with others in a WhatsApp group or on Slack, inviting them to give feedback. These reactions would be anonymous since WriteURL does not require users to sign in. Or participants in a group could brainstorm principles for a code of conduct for their circle and add them to their WriteURL document to build on each other's ideas.

Tools like WriteURL are terrific for quick, ad hoc collaborations, which can be useful when participants are aware of the tool and want to record their thoughts quickly but aren't sure if they'll need it later. For sustained collaborative documents, tools like Slack or Google Docs are a better fit with richer features.



**WriteURL** NEW DOCUMENT

**A collaborative real-time online text editor.**

No registration. No password. Just click new document.

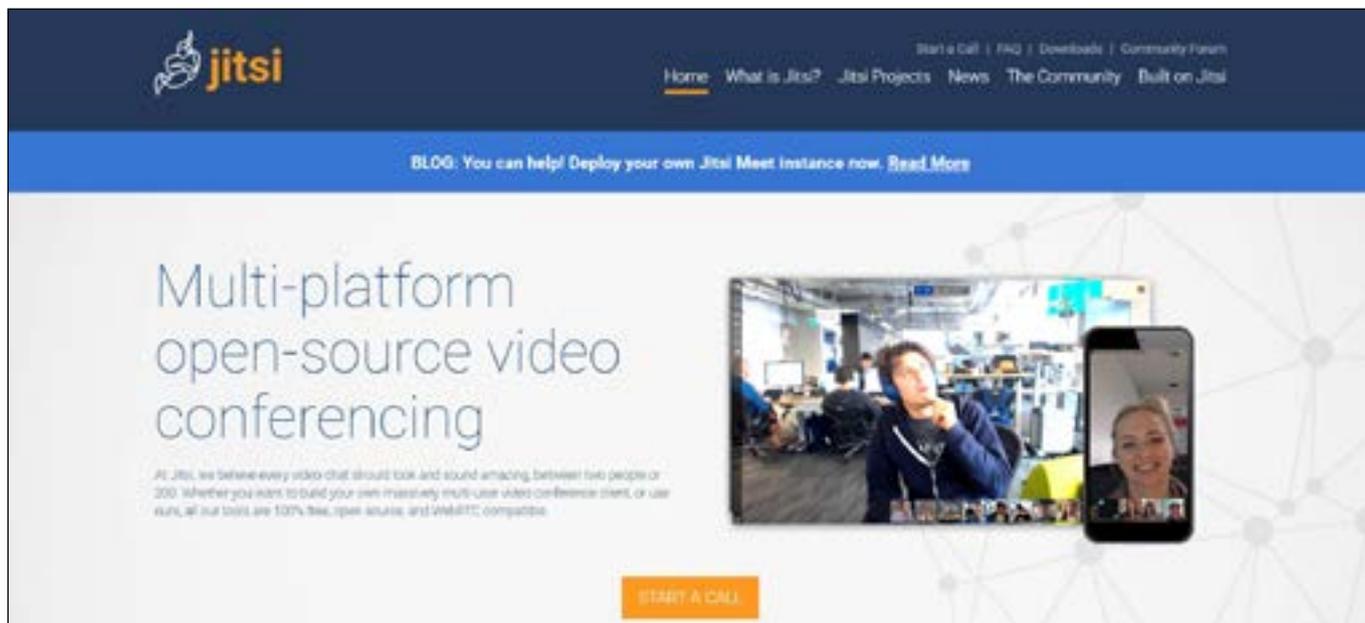
|   |  |   |   |
|---|--|---|---|
|    |   |   |    |
| <b>Text editor</b>  | <b>No registration</b>   | <b>Simple sharing</b>   | <b>Collaborative</b>  |
| WriteURL is a rich <b>text editor</b> . You can write in all languages. The text can be formatted with <b>bold, italic, underline, fonts, text size, line spacing</b> etc. <b>Links and images</b> can be included. | WriteURL has <b>no registration</b> and is <b>free</b> to use. WriteURL is the simplest way of creating a <a href="#">new document</a> . | Sharing is as simple as emailing a URL. Collaborators get the <b>write URL</b> , live readers get the <b>read URL</b> . You can always publish a snapshot of the document as a web page with a <b>publish URL</b> . | Collaborators can <b>work simultaneously</b> . Changes to the document are visible to all writers and readers in <b>real-time</b> . |
|    |   |   |    |

Source: [writeurl.com](http://writeurl.com)

## Example 5: Collaborating in environments that require high security and privacy

### Jitsi

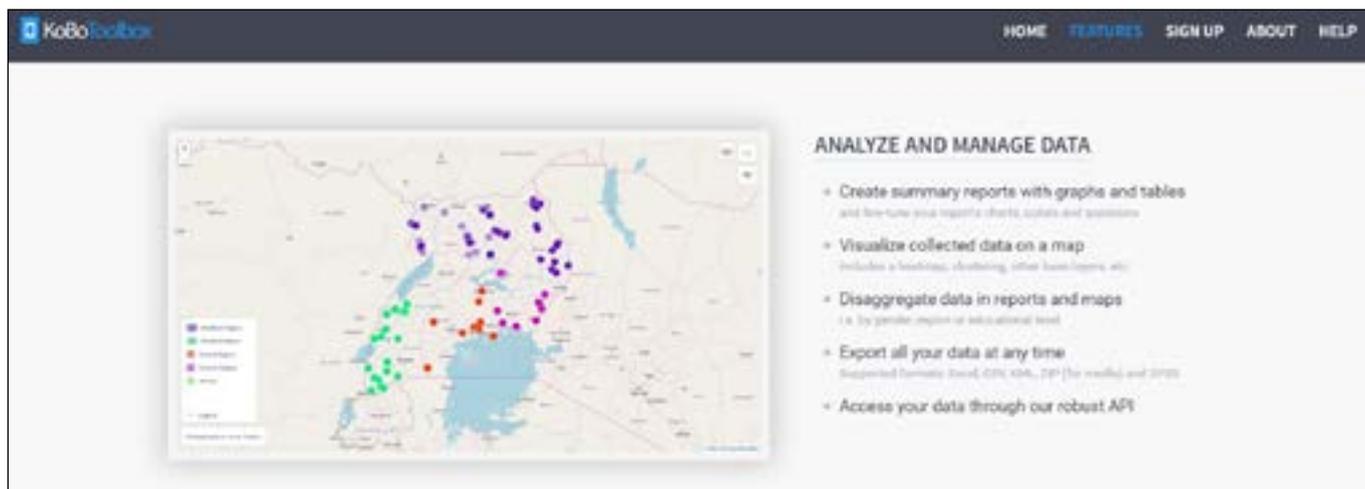
When you need to connect people securely via video, Jitsi offers a secure video conference platform where attendees can log in anonymously. The platform which is decentralized and does not track your meeting, allows you to host your own video conference with full privacy capabilities for the host(s) and attendee(s).



Source: [jitsi.org](https://jitsi.org)

### Kobotoolbox

If you need to collect data in challenging environments, you can use Kobotoolbox, a tool developed by the Harvard Humanitarian Initiative. The tool lets you conduct surveys, polls and get information from your participants securely and while respecting their privacy.



Source: [kobotoolbox.org](https://kobotoolbox.org)

## OnionShare

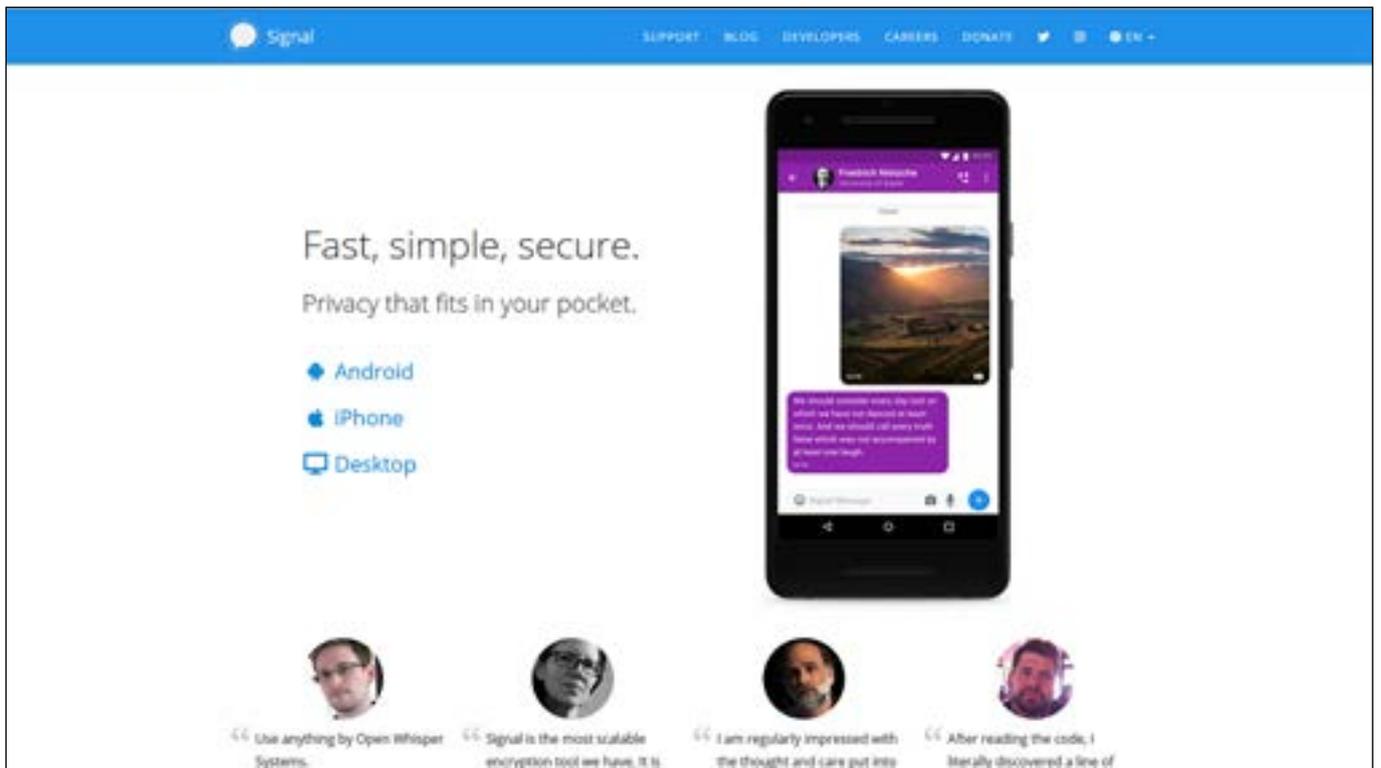
When you need to share a file of any size in a secure and anonymous way, you can use OnionShare which protects the data you are sharing as well as the privacy of the individuals you are sharing the data with.



Source: [onionshare.org](http://onionshare.org)

## Signal

Signal is a private instant messaging application that can be used to create secure channels of communication with participants.



Source: [signal.org](http://signal.org)

## Section 3

### Diagnostic for your digital needs

Selecting a digital tool to support collaboration or learning should begin by identifying your audiences' needs and what *function* you want to perform. Before selecting a tool, you can use the following worksheet to conduct a “digital needs diagnostic” to identify needs. Once you have considered needs, you can fill out the second worksheet, which offers guidance to help you select appropriate tools.

Table 1. **Digital Needs Diagnostic: Assessment Worksheet**

| Answer the following questions to diagnose whether and how you can use digital tools in your collaboration or training.  |   |
|--|---|
| <p><b>Digital literacy:</b><br/><i>How familiar is your audience with using digital tools?</i></p>   | <ul style="list-style-type: none"> <li><input type="checkbox"/> Limited digital literacy (basic functions, like adding more credits to use mobile SMS or sending SMS)</li> <li><input type="checkbox"/> Moderate digital literacy (comfortable accessing websites and services when needed)</li> <li><input type="checkbox"/> Advanced (comfortable accessing and using the internet safely)</li> </ul>   |
| <p><b>Digital access:</b><br/><i>What kind of digital technologies do participants have access to?</i></p>   | <ul style="list-style-type: none"> <li><input type="checkbox"/> Personal computer connected to the internet</li> <li><input type="checkbox"/> Shared computer connected to the internet</li> <li><input type="checkbox"/> A computer without internet access</li> <li><input type="checkbox"/> Phone without internet access</li> <li><input type="checkbox"/> Phone with some internet access (like Facebook Messenger or WhatsApp)</li> <li><input type="checkbox"/> Phone with full internet access</li> <li><input type="checkbox"/> Other</li> <li><input type="checkbox"/> None of the above</li> </ul> |
| <p><b>Digital purpose:</b><br/><i>What purposes do you expect digital tools to fulfill?</i></p>  | <ul style="list-style-type: none"> <li><input type="checkbox"/> Help people learn about concepts</li> <li><input type="checkbox"/> Help learners connect with each other</li> <li><input type="checkbox"/> Help learners reflect on and communicate their experience</li> <li><input type="checkbox"/> Help you (the facilitator) monitor how and why participants access/use different tools</li> <li><input type="checkbox"/> None of the above</li> <li><input type="checkbox"/> Other</li> </ul>  |
| <p><b>Digital profile:</b><br/><i>Will trainees need to communicate externally about this collaboration?</i></p>   | <ul style="list-style-type: none"> <li><input type="checkbox"/> No / unsure / not applicable</li> <li><input type="checkbox"/> Yes, for their own personal purposes</li> <li><input type="checkbox"/> Yes, for friends/family</li> <li><input type="checkbox"/> Yes, for teachers/classmates</li> <li><input type="checkbox"/> Yes, for potential employers</li> <li><input type="checkbox"/> Other</li> </ul>  |
| <p><b>Digital facilitation:</b><br/><i>Do you as a facilitator have the time, resources, and computer/internet access to use and set up digital tools before the collaboration/training?</i></p> | <ul style="list-style-type: none"> <li><input type="checkbox"/> Yes</li> <li><input type="checkbox"/> Depends on the digital tools</li> <li><input type="checkbox"/> No</li> <li><input type="checkbox"/> Not sure</li> </ul>   |

Table 2. **Digital Needs Diagnostic: Decision-Making Worksheet**

| Use the following worksheet to learn more about what actions you can take based on your previous responses. The right column offers prompts to guide your decision about which tools to use. |  |
|--|--|
| <p><b>Digital literacy:</b><br/><i>How familiar is your audience with using digital tools?</i></p>   | <p>If your audience’s digital literacy is <b>moderate</b> or <b>advanced</b>, go to the table 3 to select tools that support your objectives.</p> <p>If your audience’s digital literacy is <b>limited</b>, do not go to the table in section 4 to select tools to support your objectives. Instead, consider the relevance of media tools like radio, Television or analog tools like books as a means to reach your audience remotely.</p>     |
| <p><b>Digital access:</b><br/><i>What kind of digital technologies will all trainees have access to?</i></p>   | <p>If your audience has <b>limited internet access</b>, then the tools in table 3 will not be relevant. Focus instead on SMS or tools like radio, television, or text messaging.</p> <p>If your audience has <b>internet access only on a phone</b>, focus more on mobile tools like WhatsApp or other chat apps, or tools with mobile versions.</p> <p>If you answered <b>anything else</b>, review the rest of this guide to select tools.</p> |
| <p><b>Digital purpose:</b><br/><i>During and after the training, what purposes do you expect digital tools to fulfill?</i></p>   | <p>If you responded with <b>anything except for none of the above</b>, review the table 3 to identify the purpose and function that meets your needs.</p>  |
| <p><b>Digital profile:</b><br/><i>Will trainees need to communicate externally about this training? If so, for what purpose?</i></p>   | <p>If you responded <b>anything except for no</b>, consider incorporating a public social media tool like LinkedIn or introducing a tool like Sway. See table 3 for a list.</p>  |
| <p><b>Digital facilitation:</b><br/><i>Do you as a facilitator have the time, resources, and computer/internet access to practice using digital tools before the training?</i></p>           | <p>If you marked <b>yes</b> or <b>depends</b>, please complete the Table 3 to select tools.</p> <p>If you marked <b>no</b>, perhaps reconsider what tools, time, and resources you might want to plan for in the future or how you might pivot away from using digital tools.</p>  |

## Section 4

# Selecting and setting up digital tools

### How did we select these tools?

This document isn't a "master list" of all potential tools you could use. Instead, we chose tools that

- ▶ have a track record of being used for the functions suggested in table 3,
- ▶ users might already be familiar with,
- ▶ can be learned (to a sufficient degree) within 30 minutes,
- ▶ have online resources to help troubleshoot technical issues, and
- ▶ are free or inexpensive to use, or have a "freemium" option.

If a tool you're familiar with isn't listed here, that's perfectly fine. Most tasks can be performed with multiple tools, and many tools are similar. For instance, the collaboration tool Slack is similar to Mattermost and Microsoft Teams. WhatsApp is similar to other chat apps like Signal, Facebook Messenger, and Telegram. In any case, once you know what tasks you want to perform, you can choose a tool based on what most people in the group are most familiar with.

### *Social Media*

While we have not included detailed guidance on social media platforms such as LinkedIn, Twitter, Instagram, YouTube, and Facebook in this guide, many people use these platforms for features that support online group discussions, video broadcasts, content sharing, and engaging with others. Social media tools offer the option to engage public audiences. Facilitators need to thoughtfully consider the benefits and challenges of using these tools as well as privacy and security options to assess the suitability of social media tools for professional collaboration and training.

### *Learning Management Systems*

If you are a learning experience designer or a trainer, you might want to weigh the pros and cons of using a set of digital tools along with a learning management system. A learning management system can offer you the option to organize a variety of course materials in one place while incorporating useful features for trainers and learners, including ways to give learners feedback and have them submit their work. We do not provide a robust list of learning management systems since they are often higher cost and require institutional buy-in to purchase. For a free learning management system, you could consider [Moodle](#) or use [Notion](#) as a wiki for course materials.

## Select your tools

Recall from section 1 that digital tools generally serve four purposes for learning: learning, connecting, reflecting, and monitoring. To navigate this table, read each row or look for the rows that fit the purpose you have in mind. After selecting the tool based on the function and purpose you would want it to fulfill, we recommend researching it further to determine whether it would meet your needs.

Table 3. **Select Tools by Function**

|  <b>Learning</b> |   |  <b>Connecting</b>   |  |  <b>Reflecting</b> |  |  <b>Monitoring</b> |  |
|---|---|---|--|---|--|---|--|
| Function  | Learning Application  | Purpose   | Tool Options   | Select tool (s)   |  |   |  |
| <b>Dividing into groups to engage in collaboration</b>  | <ul style="list-style-type: none"> <li>▶ Participants split into groups based on interest areas.</li> <li>▶ Participants create peer learning circle groups to discuss resources about the skill they are working to improve.</li> <li>▶ Participants create breakout groups during a real-time webinar to have a targeted conversation.</li> </ul> | <br>  | <ul style="list-style-type: none"> <li>▶ <a href="#">Backchannel Chat</a></li> <li>▶ <a href="#">Discord</a></li> <li>▶ <a href="#">Slack</a></li> <li>▶ <a href="#">Teams</a></li> <li>▶ <a href="#">WhatsApp</a></li> <li>▶ <a href="#">WhatsApp Business</a></li> <li>▶ <a href="#">Zoom (real-time)</a></li> <li>▶ <a href="#">Signal</a></li> </ul> |   |  |   |  |
| <b>Polling or surveying people</b>  | <ul style="list-style-type: none"> <li>▶ A moderator polls participants to pick a peer discussion topic. E.g. public speaking, feedback.</li> <li>▶ A moderator uses the tool to share a presentation during which participants are polled. Then they see the results.</li> </ul>   | <br>   | <ul style="list-style-type: none"> <li>▶ <a href="#">AnswerGarden</a></li> <li>▶ <a href="#">DirectPoll</a></li> <li>▶ <a href="#">Mentimeter</a></li> <li>▶ <a href="#">Poll Everywhere</a></li> <li>▶ <a href="#">Slido</a></li> <li>▶ <a href="#">Kobotoolbox</a></li> </ul>  |   |  |   |  |
| <b>Facilitating game-based quizzes</b>  | <ul style="list-style-type: none"> <li>▶ Participants take quizzes to gauge or demonstrate their understanding of the content.</li> <li>▶ The facilitator can view a spreadsheet to see how individual participants responded.</li> </ul>   | <br>  | <ul style="list-style-type: none"> <li>▶ <a href="#">Kahoot</a></li> </ul>   |   |  |   |  |
| <b>Communicating to others in audio or video</b>  | <ul style="list-style-type: none"> <li>▶ A participant or moderator shares a presentation with others in real-time.</li> </ul>  | <br><br> | <ul style="list-style-type: none"> <li>▶ <a href="#">GoToMeeting</a></li> <li>▶ <a href="#">FreeConference.com</a></li> <li>▶ <a href="#">Slack</a></li> <li>▶ <a href="#">Teams</a></li> <li>▶ <a href="#">Teams Live Events</a></li> <li>▶ <a href="#">WhatsApp</a></li> <li>▶ <a href="#">Zoom</a></li> <li>▶ <a href="#">Jitsi</a></li> </ul>        |   |  |   |  |
| <b>Sharing an interactive presentation</b>  | <ul style="list-style-type: none"> <li>▶ A facilitator prepares and shares an interactive presentation where participants can provide input and otherwise participate. (E.g., respond to open-ended questions, take part in games, contribute to a document, participate in a discussion.)</li> </ul>   | <br>  | <ul style="list-style-type: none"> <li>▶ <a href="#">Nearpod</a></li> <li>▶ <a href="#">PlayPosit</a></li> </ul>   |   |  |   |  |

|   |  |   |  |  |
|---|--|---|--|--|
| <b>Using icons and audio to add visual appeal and interactivity</b> | <ul style="list-style-type: none"> <li>▶ A facilitator selects free icons and audio clips to use in projects or presentations.</li> <li>▶ An individual creates an infographic to communicate visually.</li> </ul>   |   | <ul style="list-style-type: none"> <li>▶ <a href="#">Canva</a></li> <li>▶ <a href="#">Flaticon</a></li> <li>▶ <a href="#">Iconmonstr</a></li> <li>▶ <a href="#">Infogram</a></li> <li>▶ <a href="#">Piktochart</a></li> <li>▶ <a href="#">Storyblocks</a></li> </ul>   |  |
| <b>Drawing and conceptualizing things</b>                           | <ul style="list-style-type: none"> <li>▶ A group of participants brainstorms ideas to solve a problem.</li> <li>▶ A facilitator creates an online “whiteboard” for participants to collaborate on.</li> <li>▶ Participant brainstorm ideas for a collaborative exercise during a session or meeting. (E.g., stakeholder mapping or mapping a business idea on a business model canvas.)</li> </ul> |    | <ul style="list-style-type: none"> <li>▶ <a href="#">Canvanizer</a></li> <li>▶ <a href="#">Draw.io</a></li> <li>▶ <a href="#">Google Slides</a></li> <li>▶ <a href="#">Miro</a></li> <li>▶ <a href="#">MURAL</a></li> <li>▶ <a href="#">Sketchboard.io</a></li> <li>▶ <a href="#">Sketch.io</a></li> <li>▶ <a href="#">Teams Whiteboard tool</a></li> <li>▶ <a href="#">Twiddla</a></li> </ul> |  |
| <b>Facilitating individual reflection (for one’s self)</b>          | <ul style="list-style-type: none"> <li>▶ A participant records a reflection about an experience that they’re not ready to share.</li> <li>▶ A participant records a reflection about their skill development journey.</li> <li>▶ A participant keeps a daily record of their actions and mindsets while learning.</li> </ul>   |    | <ul style="list-style-type: none"> <li>▶ <a href="#">Etherpad</a></li> <li>▶ <a href="#">Evernote</a></li> <li>▶ <a href="#">Google Drive</a></li> <li>▶ <a href="#">OneNote</a></li> <li>▶ <a href="#">OneDrive</a></li> </ul>  |  |
| <b>Sharing content or reflections</b>                               | <ul style="list-style-type: none"> <li>▶ A participant records a reflection that shows how they grew a particular skill and wants to show the reflection to colleagues.</li> <li>▶ A peer learning circle develops a series of reflective resources that might be useful to others and shares them.</li> </ul>   |  | <ul style="list-style-type: none"> <li>▶ <a href="#">Flipgrid</a></li> <li>▶ <a href="#">Google Slides</a></li> <li>▶ <a href="#">Medium</a></li> <li>▶ <a href="#">Notion</a></li> <li>▶ <a href="#">Padlet</a></li> <li>▶ <a href="#">Sway</a></li> </ul>  |  |
| <b>Storing and sharing documents</b>                                | <ul style="list-style-type: none"> <li>▶ A participant uploads photos of their engagement and site visit with a client and sends a link to others.</li> </ul>  |  | <ul style="list-style-type: none"> <li>▶ <a href="#">Dropbox</a></li> <li>▶ <a href="#">Google Drive</a></li> <li>▶ <a href="#">Notion</a></li> <li>▶ <a href="#">OnionShare</a></li> </ul>  |  |
| <b>Developing a document together</b>                               | <ul style="list-style-type: none"> <li>▶ A team develops a communication plan with feedback from peers and colleagues.</li> <li>▶ Two group members type their reflections into a shared document at the same time.</li> </ul>   |  | <ul style="list-style-type: none"> <li>▶ <a href="#">Google Drive</a></li> <li>▶ <a href="#">iTextPad</a></li> <li>▶ <a href="#">Shrib</a></li> <li>▶ <a href="#">Slack</a></li> <li>▶ <a href="#">Wiki</a></li> <li>▶ <a href="#">WriteURL</a></li> <li>▶ <a href="#">Notion</a></li> </ul>   |  |
| <b>Tracking whether and how people access shared resources</b>      | <ul style="list-style-type: none"> <li>▶ A moderator sends a reading to a group and tracks who clicks on URL to inform what kind of links they need to send next time.</li> </ul>  |  | <ul style="list-style-type: none"> <li>▶ <a href="#">Bitly</a></li> <li>▶ <a href="#">Google Analytics</a></li> </ul>  |  |

## Set up your digital tools

Once you have selected your tools, use the following worksheet to prepare for your collaboration or training. This worksheet will help you determine what digital tools you will integrate into your collaboration, as well as what steps you need to take to ensure the tools are integrated smoothly.

**We've filled out the worksheet with prompts** to illustrate how you might use it. When you use this worksheet, please delete the examples and replace them with your own.

**Table 4. Worksheet: Prepare to Apply Tools**

| # | Specific digital tool that will be used to support this activity                    | Link to the digital tool   | Is there any advance preparation or setup needed?                                  | Have you prepared the tool for use in your activity?  | Have you determined how you will introduce this digital tool to participants?   | For asynchronous collaboration, when will you onboard participant? |
|---|---|--|--|---|---|--|
|   | <i>Only put one digital tool per row.</i>   | <i>Put the link to the tool here, so that you can reference it easily later. This might be just a link to the general tool, or a link to a template you have created.</i>  | <i>Mark yes or no. E.g., some tools will require you to make a template first.</i> | <i>Regardless of whether specific preparation is needed, test the tool and practice using it with others to ensure you're comfortable with it before confirming here.</i> | <i>Determine how and when you will introduce the tool to your collaborators. E.g., including it in your meeting/training agenda. Be sure to incorporate it into your facilitation notes</i> |  |
| 1 |  | <a href="http://www.writeURL.com">www.writeURL.com</a> , <a href="https://www.writeurl.com/text/hzrxg-b1enxt91237p758/qfswrtflskiux-gl3oh3p/hkvx-emnskgs1p8332lxn">https://www.writeurl.com/text/hzrxg-b1enxt91237p758/qfswrtflskiux-gl3oh3p/hkvx-emnskgs1p8332lxn</a> | <input checked="" type="checkbox"/> Yes<br><input type="checkbox"/> No             | <input checked="" type="checkbox"/> Yes   | When we introduce the flip charts, pause and load the WriteURL template on the projector so that everyone can see the prompts.  |  |
| 2 |  | <a href="http://bit.ly/Sway-MasterTemplate">http://bit.ly/Sway-MasterTemplate</a>  | <input checked="" type="checkbox"/> Yes<br><input type="checkbox"/> No             | <input checked="" type="checkbox"/> Yes   | After everyone develops their problem statement, give them 15 minutes to load their Sway profile and add their problem statement to it.   |  |
| 3 |   |  | <input type="checkbox"/> Yes<br><input type="checkbox"/> No                        | <input type="checkbox"/> Yes  |   |  |
| 4 |   |  | <input type="checkbox"/> Yes<br><input type="checkbox"/> No                        | <input type="checkbox"/> Yes  |   |  |

## Section 5

### Additional resources

Several groups and organizations have developed, curated, and crowdsourced resources that support online collaboration and learning. Below we have included some of these resources to provide you with more information and options that can support your efforts to foster strong cultures of online collaboration and learning. Furthermore, we have included IREX training resources to help you cultivate norms for respectful and inclusive engagements online.

#### **[“Youth Brave Space Ground Rules” \(also relevant for adult participants\)](#)**

Setting the tone and the parameters for engagement in a meeting or group learning session requires informing participants of appropriate norms. This can be done by setting and adhering to Brave Space Ground Rules, which foster an inclusive environment where tolerance is critical, yet perspectives can be challenged respectfully. Use this resource to set a brave space for engagement and participation where all feel included. Please note that the space needs to be a safe space supported through policy, technology, and modeling.

#### **[“Online Meeting Resources Toolkit for Facilitators During Coronavirus Pandemic”](#)**

This resource was curated in response to COVID-19 and the need to take meetings and interactions online. It includes online meeting and work practices, tools, and specific guidance depending on the size of the group that would take part in meetings and events.

### Crowdsourced resources from educators and education institutions

As online collaboration continues to gain importance, technologies are being developed and adapted for use around the world. The following links provide recently updated repositories of crowdsourced tools and resources from education institutions and educators. (Updated on March 17, 2020.)

- ▶ [Tools for learning facilitators and educators](#)
- ▶ [“Remote Teaching Resources for Business Continuity”](#)

### Design online collaborations

If you are facilitating collaboration focused on user experience design, you can use the [Open Design Kit](#) and these tools for [user experience workshops](#).

#### **[Remote Working: Setting Yourself and Your Teams Up for Success](#)**

LinkedIn Learning offers a free course that explores ways to optimize working remotely as a member of a team or as a leader. It explores skill sets for remote work, including improving mindsets, managing time and stress, projecting “executive presence,” and building resilience and resourcefulness.