

Remote/Virtual Training Events: Options and Guidelines

1. Background

IADI has typically deployed training initiatives and programs in-person (e.g. workshops and seminars). In-person training allows participants to network with other participants and instructors throughout the event, and the training sessions can cover multiple aspects over the course of several days. In addition, the opportunity to have face-to-face open discussion makes it easier for participants to reinforce, master and execute best practices in the period immediately following training.

Remote or virtual training sessions use communication platforms designed to support webinars and live-streaming meetings. Apart from flexibility, remote training options offer a number of benefits, in particular to extend training opportunities to presenters and participants from jurisdictions that may not have the opportunity to travel to training events, while also allowing IADI to open up the training to a broader audience, providing members with a direct advantage for a larger number of their staff. In addition, it is an alternative option for providing training and capacity-building options when a situation arises that restricts the possibility of travel and/or holding large gatherings (such as the Covid-19 pandemic). Virtual training also helps significantly reduce the cost and logistical challenges associated with hosting an in-person event. Virtual events have the added bonus of a positive impact on the environment. Remote training means little to no paper is involved and people will not have to travel, so the carbon footprint of the event is significantly reduced. In addition, virtual training is an additional opportunity for Lead Core Principles Experts and Core Principles Experts to continue to work on improving their expertise and capacity building skills.

Although this approach definitely produces advantages, given that the dynamic is fundamentally different from face-to-face training, there are also challenges that must be considered:

- It is more vulnerable to technical issues.
- It requires additional activities and variety to maintain engagement and focus.
- There are significant time constraints, especially when accommodating participants from different time zones.

2. Remote training options

Virtual or remote training encompasses many types of learning, from self-directed education, through computer-based training via webinars to fully functional “virtual classroom” type activities. The following are some potential cost-effective options for IADI:

1. **Self-paced learning:** online courses (e.g. FSI Connect), where participants can learn at their own pace and convenience.
2. **Webinar:** an online training event (such as a conference) where a speaker, or small group of speakers, deliver a presentation to a large audience who participate by submitting questions, responding to polls and/or using other available interactive tools. After the lecture, the instructor can open up the floor for questions and comments

through a Q&A session. Trainees or students also have easy access to other documents and media through file sharing, and can participate directly with the content through built-in chat and Q&A. This type of remote learning can also be used in a series, so that several related webinars are held over a period of several days or weeks as part of an extended learning program.

3. **Video conference/discussion meeting:** the live streaming of audio and video that allows participants to have interactive discussions. In these types of open meetings, it is very important to establish clear instructions and allotted time for each participant intervention.
4. **Screencasts:** on-screen tutorials, video lessons and presentations are examples of video recordings shown on a computer screen that can facilitate learning.
5. **Blended Learning:** any combination of the above mechanisms, with emphasis on mixing self-paced learning with live virtual training tools. By mixing various virtual training tools, blended learning can enhance the effectiveness and efficiency of virtual learning experiences.

3. Guidance for planning a remote/virtual training event

There are a number of questions to consider before hosting an online training event:

1. What is the purpose of the event and topics to be covered?
2. Who is the target audience for the event?
3. Who will be the presenter(s) for the event?
4. How long will the event be and how will it be structured?
5. When is the best time for the event?
6. How will the event be promoted?
7. Will the event be live, on-demand, or both?
8. Where and how will the content to be viewed?
9. Will access be restricted (i.e. by invitation or registration, for a specific region(s)) or open to all IADI membership?
10. Will participants still have access to the event materials once it is over?

The following are some guidelines to help plan for remote/virtual training events and address some of these questions:

1. Defining the purpose of the event

As with any training event, the first step is to decide and outline the learning objectives. An event that will involve practical training exercises and where participants will be expected to replicate the skills learned in real-world settings (such a Technical Assistance Workshop) will require a fundamentally different structure from a webinar-type event. Defining the purpose of the event will provide a structural backbone for planning other logistical aspects. In order to establish the learning objectives, the event organizer needs to think about what participants are expected to learn or take away from the session or sessions. The purpose of the event may also influence the choice of online tool or platform on which the event will be held or how certain tools will be used (i.e. choosing a tool that facilitates participant interaction as opposed to a tool that provides a wide variety of options mainly for the presenter).

2. Selecting a topic and length/duration

Unlike traditional, in-person training sessions, and because of the limitations of virtual or remote training sessions, selecting a topic for a virtual training event requires careful consideration of participant interests. The organizer needs to decide whether they would like to present a self-contained topic or make sure to organize a series of training events that take place over a period of consecutive days or weeks.

Remote training events need to be done in shorter increments than live events, so it is key to think about what aspects of the topic need to be the primary focus, and make sure the speaker or speakers touch on these. Keeping the focus on one or two topics per session helps the participants stay engaged and ensures that time limits will not be exceeded.

The length or duration of the training course will depend on the topic and objectives selected. Topics that are lengthy and require various issues to be presented are usually delivered better if they are broken down into modules or sessions. In general, the benchmark should be to limit duration to 90 minutes in one session. This requires the event organizer to think carefully about how much participants really need to know, and build the session to last just long enough to cover that. If the chosen format includes several sessions, the information should be presented in a way that when participants return for the next session, they are building on existing knowledge gained from the previous session's content, in such cases, it may be good to provide a brief review of the previous session (approximately 5 minutes).

Take time zones into consideration, too. If you are doing a live event and plan to allow participants from other regions, try to pick a time that works for as many participants as possible. If that is not possible, determine whether content can be made accessible after the live presentations for those who could not make it. It may also be worthwhile to plan to hold more than one session for different time zones, or focus on the regional delivery of training programs.

Once these various issues are considered and decisions are made regarding the different logistical aspects, an agenda can be drafted that includes an introduction and purpose for the event.

3. Before the training, lay the foundation and promote the event

There are several options to lay the foundation for a virtual training event; however, in all cases, it is important to focus on the big-picture topic and overarching principles rather than minute details. When materials can be made available to participants beforehand, make it clear that this content will be the starting point of the upcoming training event. The following are some options to lay the foundation:

- a) Send participants brief articles, infographics and/or videos that are both relevant to them and easy to assimilate.
- b) Send participants a list of questions to get them thinking about their jurisdictions' experience on a particular topic.
- c) Require participants to complete an online tutorial or read previously published IADI research papers or guidance.

Whatever you choose to send, focus on big-picture topics and principles, rather than one-minute, detailed instructions. Send participants the event presentations and/or materials sufficiently in advance so they can review them prior to the event and prepare questions or comments.

In general, it is important to set well-defined goals for the training and clearly define what you expect participants to get out of this training. Determine the key selling points your event has to offer attendees. It could be a noteworthy speaker, skill sharing, an opportunity to learn from real-world experiences, among others.

4. During the training, stick to your plan

In a remote or virtual training setting, it is important to get participants engaged as quickly as possible. In order to do this, you can start the training sessions by addressing the material or content that you shared with participants in preparation for the event. If the session is set up for discussion and feedback, the training can begin by asking participants to share their reaction to the material and pose questions. If discussion questions have been distributed in advance, plan to allow for enough time for participants to provide their analysis and responses.

Another key aspect is time management. Given the time constraints of a virtual event, it is essential to plan out your schedule in detail and make sure the materials prepared by presenters or speakers adhere to the allotted time. It is particularly important to make sure that enough time is left for audience participation to avoid the training session becoming one-sided. A useful way to make sure the training event stays on track and is engaging for participants is to designate a moderator. A good moderator ensures the event will flow smoothly and finds ways for participants to stay engaged. It is important for the moderator to coordinate with speakers on how time will be managed and how questions will be handled.

5. After the training, send resources and ask for feedback¹

As with in-person training events, it is essential to get feedback from participants on what worked and what they liked, as well as the aspects of the training (either format or content) that could be modified or improved. Gathering opinions is essential at any stage because you need to figure out what works and what does not. The questions should generally address the following:

1. What do you like the most about the training you receive?
2. What do you like the least about the training you receive?
3. What would you like to change about the training?

Variations of these three questions may exist, but it is important to gather the main points of what participants have to say about the training event.

In addition, with remote/virtual training events, it is even more important to send resources that clearly show participants how to implement or use what they have learned. Distribute any materials that may have been used or uploaded last minute, and be sure to give access to the presentations and materials used for a set period of time (1 month after the event).

¹ The *IADI Manual for Planning and Conducting Technical Assistance Workshops* provides a template for feedback which can be adapted for virtual or remote training events.

4. Guidelines for IADI Sponsored Virtual Technical Assistance Training Events

The *IADI Manual for Planning and Conducting Technical Assistance Workshops* provides detailed instructions and guidelines for planning, preparing for, and conducting an IADI sponsored Technical Assistance Workshop. With appropriate modifications, guidelines from this Manual can be adapted and used for planning and conducting other types of workshops. The following are the key points applicable to a live remote/virtual technical assistance training events:

1. Planning

- a. The Host DIA² will notify the CBTC Chairperson and STTAA (and/or his/her representative in the Secretariat) at least ten to twelve weeks prior to the planned remote training event to coordinate on event dates, themes and content. This coordination is key when the Host DIA is planning to utilize extensive Secretariat resources to organize the virtual event. The Host DIA must designate a primary organizer for the event to be the Local Liaison. If a Regional Committee (RC) endorses the event, the RC Chairperson (or his/her representative) should also be designated and participate in planning for the event. The STTAA (or his/her representative) will act as Coordinator for the training event.
- b. The Local Liaison (or his/her representative) will schedule conference calls as necessary to discuss logistics with the CBTC Chairperson, RC Chairperson and STTAA, or designees.
- c. The Secretariat, in consultation with the Host DIA, through the Local Liaison, sends out “Save the Date” invitations to IADI Members or to just the DIAs in the region, depending upon the purpose and structure of the virtual training event. The invitation includes dates, overall theme, registration information and targeted level of participants, if appropriate.
- d. Funding for IADI Training Events is designated for travel and organizational expenses; as such, it is generally expected that remote training events will not require funding. However, in rare circumstances, the Host DIA may request funding by contacting the IADI Secretariat. Any expenses that were granted funding will require the Host DIA to submit documentation to the Secretariat after the event.

2. Agenda

- a. Considering the existing remote training options and guidance stated above, the Host DIA will prepare a draft agenda indicating possible speakers and topics. A brief description of the specific goals to be accomplished for each topics should also be included in communications with the Secretariat and CBTC Chairperson.
- b. The CBTC Chairperson, STTAA and RC Chairperson, or designees, if applicable, will review and approve the agenda and/or theme for the event.
- c. The Host DIA and/or RC Chairperson, or the IADI Secretariat if so required, will invite potential presenters and/or panellists.
- d. The Local Liaison will request that presenters and panellists send brief biographies and presentation materials (PowerPoint slides) at least two weeks prior to the event.

² For events organized by initiative of the CBTC or Secretariat, a similar planning process will apply, but excluding the role of Local Liaison. The applicable activities would be completed by the Coordinator.

3. IT Platform

- a. IADI hosted/sponsored events will be held on Webex, as per BIS guidelines.
- b. Use of other platforms is allowed; however, IADI cannot endorse events on certain applications (Zoom, in particular, which is barred from use by the BIS), so approval of the proposed platform is required for IADI-sanctioned events.
- c. The Local Liaison and the Coordinator will need to discuss and establish limits on the number of participants that will be accepted overall as well as from a single DIA, in particular if there are limitations with the platform used when a specific number of participants is exceeded.
- d. Testing exercises are encouraged with all panellists to ensure there are no relevant questions to be addressed prior to the training event date and check connectivity issues.

4. Conducting the Remote/Virtual Training Event

- a. At least one week prior to the event, the Host DIA must send out relevant materials and discussion questions to lay the foundation for the event.
- b. The Coordinator, in consultation with the Local Liaison, must ensure that a facilitator is designated to kick-off the event and introduce the presenters and/or panelists.
- c. The event facilitator must ensure that the event finishes on time, and keep track of questions for the presenters and/or panelists.

5. Follow-up

- a. The Host DIA, via the Local Liaison, will reach out to participants to request feedback for the remote training event.
- b. The Local Liaison will use the feedback to present a report to the CBTC Chairperson and STTAA. The Coordinator will provide a report template to the Local Liaison.
- c. The Local Liaison will submit the final version of all event materials and participant evaluations to the Secretariat. The materials will be uploaded to the Knowledge Events tab on the Members-only website.

Annex

Timeline for a Virtual/Remote Training Event

| Weeks prior to event | Action Item |
|-----------------------------|---|
| 10–12 | Notify CBTC and STTAA on plans to host a virtual training event and schedule coordination call (agree on timing of subsequent calls as needed). |
| 8–11 | Deliver a draft agenda for review and comments. |
| 7–9 | Coordinate registration and hosting needs with the Secretariat. Contact panelists/presenters. |
| 6–8 | Finalize agenda approval and send out “Save the Date”, including registration information. Finalize speaker confirmations. |
| 2 | Collect brief biographies and presentation materials from presenters/panelists. |
| 1 | Send out relevant materials and discussion questions to participants to lay the foundation for the event. |



References and Additional Resources

CISCO Webex. "Welcome to Virtual Learning":
<https://www.webex.com/webexremoteedu.html>

FSI Connect. Financial Stability Institute: <https://www.fsiconnect.org/>

Shimkus, Darren. "Learning Is Essential To Your Remote Workplace Strategy." Forbes Media LLC, April 9, 2020, <https://www.forbes.com/sites/darrenshimkus/2020/04/09/learning-is-essential-to-your-remote-workplace-strategy/> \ "7fe63feb8f95

Matttson, David. "3 Tips for Making Remote Training Sessions Work." Training industry, July 9 2018, <https://trainingindustry.com/articles/remote-learning/3-tips-for-making-remote-training-sessions-work/>