Province of Yorkshire, West Riding

Webinar Management Group Guidance Notes

1. Team background and role

When Covid restrictions forced the abandonment of Lodge meetings, a small team was established to run online sessions covering the normal Masonic Light activities of lectures and presentations. Webinars were initially developed covering explanations of the three degree ceremonies. Subsequently other topics of a more general interest were covered, including one on the Royal Arch Jewel.

The degree webinars were adopted by the UGLE Learning & Development Group and incorporated into the Solomon programme, where Yorkshire, WR is acknowledged as the source.

The West Riding Webinar Management Group has successfully produced the UGLE Learning & Development Conference, which involved some direct working with the Deputy Grand Master and the Grand Secretary.

The West Riding Webinar Management Group has now included role training for Lodge Officers in its portfolio and provides a resource, available to the whole Province, for the production of online teaching, training and conferences.

2.

How do online meetings work

During the suspension, Zoom has become the most common platform for online meetings and socials. In terms of online teaching and training, Zoom sits on a continuum stretching from online video files, such as those on YouTube, to the sophisticated Virtual Learning Environment used by UGLE's Solomon.

Using an online platform for training requires a very different approach from face-to-face situations. As a presenter, you will need a computer with microphone, speakers, and, usually, a webcam. If you are presenting "live", you will also need a good internet connection that isn't shared with other members of your household during the presentation.

Your audience will need a computer, tablet, or smartphone with speakers; a microphone and/or webcam is not always essential but may be for some live sessions.

A big difference from face-to face training is that you will receive very little, if any, non-verbal feedback from your audience; therefore, other ways must be developed to keep them engaged. Presentations should be relatively short (15-20 minutes), and interaction is made possible through polls (of various types) and Question & Answer sessions. If you've identified the interests of your audience by following the steps below then you can be much more certain of keeping their attention.

West Riding Webinars have access to, and experience in, a wide range of online solutions. We will work with you to ensure the material you want to present is delivered in the most efficient and effective manner. We can help with all stages of the training cycle described below.

3. How to Prepare for an Online Session

a. Define your audience

Who is going to be an audience member? This may appear to be an obvious question, but it is one worth considering carefully. It may be your entire team, specific members of your team or even the entire membership of a Lodge, Area or Province!

Example 1

You have an idea that you want to deliver a deeper explanation of the First Degree Ceremony. Who should be the audience?

a) Newly Initiated brethren.
b) Brethren about to take their Second Degree.
c) Experienced brethren.
d) Experienced Past Masters

In the example above the obvious answer appears to be a). newly initiated brethren, but would the other groups benefit as well? You may need to prioritise. To identify who your audience is you will need to define the expected outcomes for your audience.

b. Define the expected outcomes for your audience

i. What do *you* want them to get out of it? You may have a clear idea already about what your audience should be getting out of the session. You may already have identified that there is a gap in their knowledge or skills.

Example 2

You are a member of the Provincial Secretariat and you have noticed inconsistencies in the way Lodge Secretaries complete certain online forms. There are common errors. The online form has recently been introduced.

In the example above there is appears to be a clear learning need, Lodge Secretaries should be familiarised with the new online form in general terms. However, it maybe that it is not so clear as to what the learning need is. You may wish to survey your potential audience to ascertain what difficulties they are experiencing, or what they perceive to be their lack of knowledge or skill. When you do survey them, be careful how you frame the question/s. if the questions are too open the answers also will be open, and you may end up none the wiser. Below is an example of a survey related to the above issue.

Example 3

Consider the New Online Form and please answer the below question as best you can. Select 1 if you fully agree and select 5 if you totally disagree, 3 is undecided.

I fully understand the purpose of the New Onliner Form	1	2	3	4	5
I find the New Online Form easy to use	1	2	3	4	5
I know the sequence of the boxes I need to complete	1	2	3	4	5
I know what information has to be entered into the boxes	1	2	3	4	5
I know how to submit the form	1	2	3	4	5

c. Why will they want to attend

Your audience may well ask "what's in it for me". You may be clear as to what *you* see as the need for the training, but you also have to engage your audience. If you have conducted a survey, your audience may be giving clear answers to that question.

> Example 4
>
> Q. "What's in it for me?"
>
> A. "From the survey you completed, it appears you are unclear about what boxes to complete on the form and why you are completing them. This session will update you, and those things will be explained to you".
>
> Another example may be.
>
> Q. "What's in it for me?"
>
> A. "We are going to be introducing a new online form that may help you in your role as Lodge Secretary, we are going to explain how this form works, what its purpose is and how you should complete it."

d. Define your objectives for the session

i. Once you have identified what the learning need is, you will need to look at what the aim and objectives for your session are.

An "aim" should

- Meet the needs of learners and the organisation.
- Indicates to all concerned what the training is intended to achieve.
- More than just a title.
- What the presenter intends to achieve.
- Only one per session.

> Example 5
>
> An example of an Aim may be.
>
> "To induct Lodge Secretaries into the use of the New Online Form"

Objectives should

- Be a set of simple steps that follow a logical sequence.
- Linked to the Aim
- Indicate the learner's development through the session.
- Be able to be observed and measured.

Example 6

Examples of Objectives may be.

1. At the end of the session learners will be able to describe the information that has to be entered into the boxes in the New Online Form. (knowledge)
2. At the end of the session learners will be able to explain the use of the New Online Form (understanding)
3. At the end of the session learners will be able to demonstrate use of the New Online Form. (application)

Keep it simple and clear. Bear in mind that most people's attention span is not much more than 20 minutes. Don't try to overload your audience with too much information at once. The only way you can eat a whole elephant is in bite sized chunks. Your delivery may be better divided into multiple sessions.

d) Decide on type of session

Once you have established your Aim and Objectives you will now be ready to decide the best method of delivering them. You my decide that the nature of the learning does not require a Virtual Learning Session* at all, other methods are available. However, if you decided on virtual learning a number of options are available.

* (In this context "Virtual" means online, electronic or web)

i. Live Webinar

Webinar is a normally a general term and stands for Web Seminar. For our purpose's webinar means a talk delivered online with accompanying slides, audience polls and a Question-and-Answer session at the end. An example of these is the West Riding Masonic Light Webinars currently being delivered in the Province.

ii. Live Briefing

A briefing may be similar to the above but without direct audience participation.

iii. Training

A training programme maybe one or several sessions, each one similar to a webinar with polls designed to test that learning objectives are being achieved.

iv. Live Workshop

This would probably be an online plenary session, with audience members and a presenter on screen together. The presenter would facilitate a discussion on the topics to be covered. This type of activity would be best if the audience group is relatively small.

v. Break out rooms.

A breakout room is again a facilitated plenary session, but it may be there are several breakout rooms embedded into a larger session. The audience is divided up into several smaller units with a facilitator to each group. Each sperate group may have a different question or topic to consider based on the content of the preceding session. At the conclusion of the breakout the groups will re-join the main audience and facilitators will present any conclusions reached.

e. Define Session Length and breaks.

After you've done all the technical planning consider the other needs of your audience. Ensure that comfort/drink/meal breaks are incorporated into your session/s. You will not hold the attention of your audience if they are uncomfortable. You need to consider their health and wellbeing.

f. Having spent a lot of time and effort into preparing your session/s you will want to evaluate their success. At the end of the session, each participant will receive an online survey that they are asked to complete. There will be some general questions and some prepared by you to address particular areas. Remember this survey is purely a "first impressions" survey and will record their immediate thoughts and feelings only. Let's call this Level 1.

A short period after the session/s you will want to send them a further survey at Level 2; This Learning evaluation shows you what, if any, learning took place. Did the participants learn something from the training? If so, what? Here you may wish to repeat some of the polls you incorporated into the body of the session with some additional questions.

Example 7

Some examples of Level 2 type questions.

- Do you think you've gained the skills you needed to learn?
- How would you rate your knowledge on these concepts from 1-10?
- Are there any topics in the course you still don't understand?
- Do you feel as though you can apply what you learned to your role?
- What is the biggest change you've noticed so far with these new skills?
- Did anything noticeably hinder or promote your ability to learn during the training?
- Does our organization's culture contribute to your ability to learn?
- Are there any topics you would like to pursue learning further?

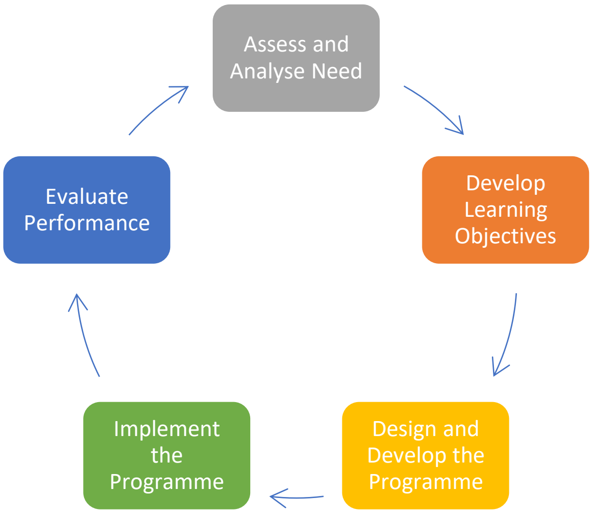
After a further period of time, long enough for your audience members to be able to incorporate their skills into their work/role you can conduct a survey at Level 3. Did the training/briefing produce actual changes. In other words, did the participants use the knowledge and skills from the training when they went back to fulfilling their roles?

Example 8

Some examples of Level 3 type questions.

- Are you using what you learned in training in your role?
- Are there noticeable changes in individual and team performance post-training?
- Think back to prior training. How are you performing in your role now compared to after previous learning initiatives?
- Are there any obstacles or bottlenecks preventing you from using your new skills

The diagram below summarises the ideas covered in this section.



1. **Filling in the request form**

2. **Agree dates once the above is complete**
   a. Session Date(s)
   Whilst discussion about desired dates can be discussed from the outset, due to the preparation work involved and time needed from the production team, we cannot commit to dates until we can understand your requirements. Once the Aims, objectives and presentation type are understood and the required information submitted to the Webinar Management Team on the form, dates for the session(s) can be formalised.

   b. Draft slide and script deadline
   In order to allow sufficient time to review and assess these, all draft scripts and slides must be submitted at least 2 weeks prior to the event. Given the support that the production team will be providing, these should be very close to final versions.

   c. Final slide and script deadline
   So as to allow time for the scripts and slides to be collated for the dress rehearsal, final versions must be submitted no later than 1 week prior to the event. We cannot accept any changes after this point unless in exceptional circumstances which must be agreed with us.

3. **Roles in a session**

a. Presenters (Inc Keynote VIPs)

Your Presenters are the “face” of you event. They are responsible for delivering the script, commenting on polls and answering questions on the content of the session. As noted above, Online presentation is quite different to doing a presentation in a Lodge room and requires different skills. They should be a clear, confident speaker who is able to read and deliver a script in a conversational way without the benefit of seeing their audience. The Webinar Management team can advise and assist you in your selection of presented if you wish.

If you have a VIP keynote speaker, they will generally work differently to a normal presenter

b. Producers

The producers will work closely with your team to help them hone the content of the event into a form that will work well in the Online environment. They will also assist your presenters etc. to develop their online presentation skill where necessary.
The Producers also run the technical aspects of the event. They will explain the use of the platform to attendees, manage slide transitions and polls and facilitate any Q&A sessions during your event.

The producers for your event will be allocated by the Webinar Management Team.

c. Facilitators

If your event uses breakout rooms, you will need to allocate a facilitator to each room. The facilitator’s role is to encourage discussion of the topic(s) assigned to their room and collate feedback for presentation back to the whole event.

The Facilitator should be able promote discussion without leading it, draw members of their room into the discussion if they are hanging back and, most importantly, listen to what the room members are saying to accurately and succinctly feed back the most pertinent points.

d. Continuity Announcer

Where your event has multiple presenters, you may wish to include a continuity announcer in your team. This person’s role is purely to open/close the event and introduce each topic/speaker. They should be a clear and confident speaker.

You may wish to assign one of your Presenters to fulfil this role if you do not want an additional person.

e. Panel Members

Where the presenter(s) for a session are not selected for their presentation skills rather than subject matter knowledge, you may wish to assign one or more subject matter experts (SMEs) to join the Presenter when it comes to the Q&A session(s).

We would recommend using the minimum number of SMEs possible to give coverage of the topic(s) but, certainly, no more than three. If using multiple SMEs, you should try to have subject areas assigned to each to assist the production team in allocating questions to them. Again, the Webinar Management Team can assist you in setting this up.

4. Scripts and Slide Decks

a. Ownership

All materials produced in respect of any sessions are owned by the organiser of the session. That is the content, aims and objectives are the responsibility of the organiser. The Production Team from West Riding Webinars will assist and provide guidance, but ultimate editorial control rests with the organisers.

Overall copyright over any material produced within the Province rests with the Province.

Scripts

b. Purpose

The purpose of a script is threefold. Firstly, it enables the presenter to communicate a consistent message during a session. Extemporising with a "live" audience has its benefits, but in a virtual session a more formal approach is necessary to maintain timings and also to avoid possible confusion. Workshops and Breakout Rooms operate slightly differently and that will be covered later in this section.

Secondly a formal script will enable any presenter to pick it up and use it. The person you have chosen to be the primary presenter for your sessions may not be available on every day or may suddenly become indisposed and not be able to do their bit.

Thirdly a script allows the production team to follow the progress of the session. This is important so that the timing of PowerPoint slide changes and the introduction of polls is maintained. It may also be that due to unexpected technical issues one of the production team has to step in as presenter.

c. Principles

Keep it simple. This is not because your audience members are unintelligent or unable to follow what you are saying, but because everybody learns in a different way. From those who are totally hands on and learn by doing, to those who will read an instruction manual from cover to cover and read it again for good measure to some who are in between.

Therefore, you are trying to strike a middle way and simple is often best. You have already decided on the objectives for the session when you were designing it. Work around these as clearly and concisely as you can. Again, a middle way should be aimed for. Too simple and the information/knowledge/skill will not be communicated, but too complex and you may lose half your audience after the first paragraph.

As mentioned above the content of your script will be structured around the learning objectives for your session. If you are delivering a *Live Briefing,* you may simply wish to communicate a set of facts and your objective will be something like that in the example below.

Example 1

At the end of the session learners will be able to state the total amount of money raised by West Riding Masonic Charities in the year 2021-22.

Your script then will be reasonably straight forward. If you wish to convey ancillary information, let's say, a breakdown of the monies collected in each Area or Lodge. You may wish to provide this as a handout rather than be contained in the body of your script. Large chunks of information delivered verbally may be a bit difficult for your audience to digest.

If you are delivering a *Live Webinar* on, for instance, an Explanation of the First Degree, your objectives may be something like those in the example below.

Example 2

- At the end of the session learners will be able to describe the preparation of a candidate for Initiation.
- At the end of the session learners will be able to explain why candidates are prepared for their initiation.

In which case you may wish to introduce polls into your script.

Your first poll could be designed to test the current knowledge and understanding of your audience.

Example 3

Are you confident in explaining the First Degree to a new Initiate?

A. Yes.
B. No.

Subsequent polls could be designed to test progress of the learning for example.

Example 4

Registration Forms P should be submitted when?

A. After the Candidate has been Initiated.
B. After the Candidate's Raising.
C. After the Candidate's ballot for admission has been successful.

A poll could be used to introduce a new topic.

Example 5

Do you know of the Galilean Heresy?

A. Yes.
B. No.

In Training sessions there may be several polls for each session. As above they should be based around the learning objectives.

At the conclusion of your delivery, you may include a question and answer session. Learners can submit written questions during your session using the facilities incorporated into the webinar platforms. There is also a live "hand up" question facility that can be used at the end of the session. The Q & A will be managed by the production team, but your presenter should be prepared with suitable answers!

Workshops and *Breakout Rooms* are different in that they do not require a formal script as they are essentially plenary sessions and participants are encouraged to think freely and contribute ideas. However, questions should be prepared so that the facilitator can direct the plenary session if contributors stray too far off topic. Any questions should be linked to the Aim and Objectives of the session.

Slides

In this context "slides" refers to PowerPoint slides that can be used by PowerPoint in webinar software or can be exported as PDF documents.

d. Purpose

Slides should be used to compliment and illustrate your presentation. To reinforce ideas and concepts. Simplicity is again the aim.

e. Content

How much information needs to go on a slide? Just enough to focus on the message the presenter is delivering from their script. Reproducing the script verbatim on a slide is counter productive as your audience will be trying to read the slide and not be listening to the presentation. Look for key learning points as in the example below.

This slide is meant to illustrate that Elias Ashmole, one of the earliest English Freemasons known, was the founder of the famous Ashmolean Museum in Oxford. The full explanation is contained in the script for the session and needs nothing further in the slide.

Another example is this.

Province of Yorkshire, West Riding

Masonic Light

Steps in a Learning Needs Analysis

- Assess and analyse Need.
- Develop Leaning Objectives.
- Design and develop the programme.

These are the key points for developing a Learning Needs Analysis. A full explanation of the process is contained in the script.

f. Number

Consider the number of slides in your deck. There is such a thing as “Death by PowerPoint”. As the content of each slide should be the minimum sufficient to convey your key points, so should the number of slides be the minimum sufficient. Too many slides will again distract your learners, especially if they crammed with lots of information and they are coming at the rate of one every two seconds.

If the average length of each of your sessions is about 20 to 25 minutes, the maximum number of slides should be no more than ten, but about six or seven should suffice. However, like most rules there is an exception, you could incorporate more slides provided their content is an image or illustration. Avoid forcing learners to read extra “stuff”.

g. Slide Design

Although responsibility for the slide content is down to you as the organisers, the design of the slides themselves will be undertaken by the Webinar Production Team. This will ensure a corporate consistency in slide design. As with the composition of the scripts, the Webinar Team will work closely with you to produce the best results.

5. Technical guidance

a. Use of Cameras

i. General guidance

All the research on digital presentations suggests that it is better for the audience not to see the speakers whilst they are actually presenting. Not only is it a visual distraction but, because there is no audience feedback, the speaker can appear “distanced”, especially if reading from a paper copy of their script. We would usually leave the camera on at the start of a presentation but turn it off soon afterwards. This, of course, does not apply to a session with an interview or discussion setting.

ii. Breakout rooms

Breakout rooms are the exception for camera use and here it is recommended that all attendees in a breakout room have their camera on to encourage participation and collaboration.

b. Connectivity/Bandwidth

We would recommend that you have a cabled connection to your router if at all possible (and there are several ways of achieving this) but, if not, please ensure that you have a good, strong, Wi-Fi connection. The Webinar team will be pleased to advise if you have any questions.

We also suggest that you make sure other people in your household are not using high bandwidth applications at the same time as you are on. These could include: other web meetings; watching videos on the internet; watching a streaming service on a computer or TV (such as Netflix or Amazon Prime Video); Online videogames or downloading movies or large files.

c. Audio

For the clearest audio (both for your microphone and for listening) it is recommended that you use a proper headset with boom microphone. If this is not an option however, most computers nowadays have reasonable microphones and speakers that should be acceptable. This may not always be the case for people who only have a tablet or phone.

Please note that you need to ensure that where you sit does not cause sound to reverberate or echo in the room as this can make it very difficult for attendees to hear you clearly.

d. Video

Most modern computers, tablets and phones have quite good cameras, but it is worth testing with your assigned producer.

You should also pay close attention to your positioning in relation to the camera with regard to the following:

i. Make sure you are in the centre of the image and not too close or far away.
ii. Ensure that you do not have a distracting background or anything in the background that you do not want people to see.
iii. Check that your clothing looks OK on video – highly patterned clothing can look distracting or not display correctly

e. Lighting

Lighting is very important on video presentations where you will be on camera. The following things should be taken into account:

i. You need to be illuminated well enough for the camera to show you clearly
ii. Avoid sitting with you back to windows or other sources of bright light as this will cause your face to be in deep shadow
iii. Where possible, have a light source in front of you so that your face is evenly lit (you can bounce this off a plain, neutral coloured wall to avoid light in your eyes – A coloured wall will reflect that colour back onto your face)

6. Presentation team training and rehearsals

When a session has been agreed and presenters etc. have been nominated, as noted above, the Production team will assign team members to assist in Script and Slide production. In addition, they will also begin introducing your team to the platform which will be used along with the presentation skills for the relevant style of session.

Once the draft scripts and slides have been received the Webinar Management Team will run a familiarisation session for the platform that your session to make sure all your presenters etc. are aware of the controls that they will need to use. Once they are familiar with the platform, the producers will run some practice sessions with individual members of your team (how many will depend on the experience of your team).

Finally, once all the Scripts and slides are complete, the Production team will run one or more full rehearsals (depending on your need/wishes) to ensure that everything is set up correctly with slides/polls/scripts, to ensure that everyone is aware of their roles and timings and to give your team a feel for how the whole event will go.

7. <u>Post event review with the organiser</u>

Within a few days of your event the production team will provide you with the attendance data and survey results from your session(s) and organise a review meeting with the organiser.

This review gives both teams the opportunity to see what went well and where lessons can be learned to improve future sessions. It should be an open and honest discussion for both sides to provide constructive feedback.