

Information Management Resource Kit

Module on Building Electronic Communities and Networks

UNIT 5. ONLINE FACILITATION

LESSON 4. PREPARING AND ORGANIZING ONLINE DISCUSSIONS

NOTE

Please note that this PDF version does not have the interactive features offered through the IMARK courseware such as exercises with feedback, pop-ups, animations etc.

We recommend that you take the lesson using the interactive courseware environment, and use the PDF version for printing the lesson and to use as a reference after you have completed the course.



Objectives

At the end of this lesson, you will be able to:

- understand the role and responsibilities of the facilitator in different types of online discussions;
- identify “support” tasks and facilitation tasks of a facilitator; and
- describe in detail “support” tasks and related activities.



Introduction



Facilitator approaches depend on the nature of the group or community.

In this lesson you will find a description of the roles and responsibilities of a facilitator in managing different types of online discussions.





You will also be introduced to the *support tasks* required of a facilitator.

Roles and responsibilities of the facilitator

A key element in deciding the roles and responsibilities of an online facilitator is the type of discussion taking place in the community.

For different kinds of discussions there are different roles for a facilitator...

A facilitator sometimes also act as a **moderator**.

TYPE OF DISCUSSION	ROLE OF FACILITATOR
 <div data-bbox="872 511 1262 611"> <p>without time limitations ⓘ</p> </div> <div data-bbox="872 618 1081 689"> <p> Example</p> </div>	<ul style="list-style-type: none"> • is limited to animating and regulating the discussion and making sure that the technology works smoothly in the background;
 <div data-bbox="887 772 1277 879"> <p>time-limited ⓘ</p> </div>	<ul style="list-style-type: none"> • since the discussion follows an agenda and will result in specific outcomes, the facilitator is more actively involved in regulating, focusing and animating, because of the time limitation;
 <div data-bbox="872 1011 1300 1146"> <p>time-limited within a discussion without time limitation ⓘ</p> </div>	<ul style="list-style-type: none"> • for the duration of the event, the facilitator has to energize the community into a more organized and focused discussion; when guests are invited, they need to be introduced and given a role in the discussion.



Would you like to know more about moderation?

See Annex 5.4.1 for a mini-lesson on this topic

Tasks of the facilitator

Whatever the type of discussion taking place in the online space, as an online facilitator you are responsible for certain **tasks**, which can be divided into two categories...

❑ **Support tasks** deal with technical support, subscriptions, bounces, vacation messages, attachments. They are the following:

- 1) **preparing for and organizing the discussion;**
- 2) **dealing with technical problems;** and
- 3) **closing your discussion space and follow up.**

❑ **Facilitation tasks** deal with regulation of the discussion, creation of an encouraging environment, mediation. They are the following:

- 1) **maintaining focus;**
- 2) **building trust;**
- 3) **encouraging participation;** and
- 4) **dealing with conflict.**

These tasks will be explored further in the unit.

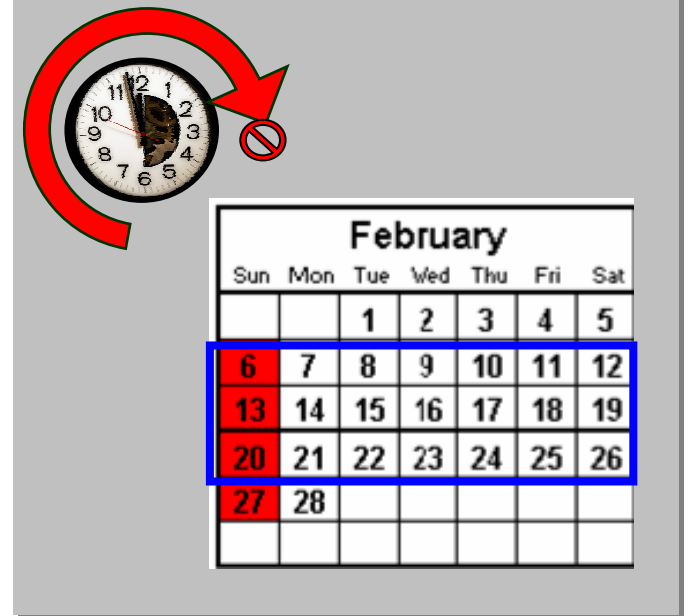
On the next pages you'll explore what the support tasks are about.

Tasks of the facilitator

Let's start to examine the support tasks using a **case study**:

Imagine you are called to facilitate a **three week online/learning discussion** event about portals, organized by The Association for Progressive Communication (APC).

The discussion has been announced in other related online communities, while experts have been invited to prepare online presentations.



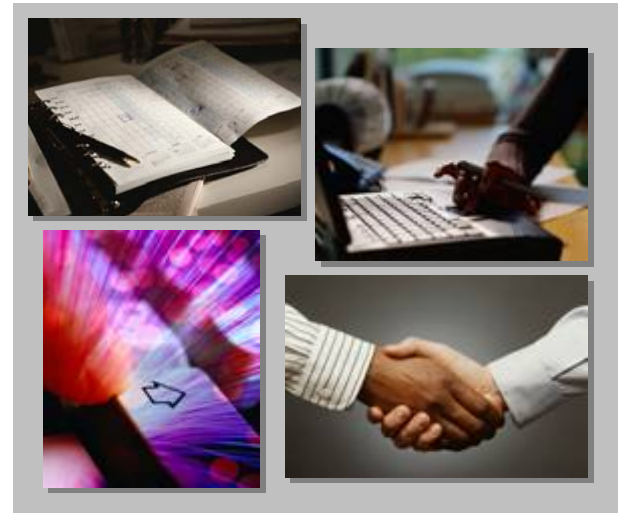
What should you do? Let's look at this together...

Organizing discussion

The first task of the online facilitator is **preparing and organizing** the online discussion. This phase can decide the success of your online meeting.

Here are some of the steps you might follow:

- setting the agenda;
- subscribing and unsubscribing;
- “opening” the discussion space;
- welcoming, introducing, orientating;
- introducing rules and guidelines;
- reviewing and approving the agenda.



Would you like to know more about setting an agenda?
See Annex 5.4.2 for a mini-lesson on how to develop an agenda for your community's online discussion

Organizing discussion

Setting the agenda

Work closely with the board of the association to establish an agenda with discussion points.

Be realistic about the time frame in which you are working.

It can take some days before the discussions take off. Put less important points at the top of the agenda if you expect a slow start.



Organizing discussion

Subscribing and unsubscribing members

Make sure that all participants in the discussion are subscribed to the mailing list, discussion board, or other online space you use for the discussion.

Make it easy for people to subscribe if you want as many people as possible to participate.

If you want to restrict participation, keep stricter control over subscription and personally approve each request to subscribe.



Organizing discussion

“Opening” the discussion space

Post support documents such as background materials, discussion papers and discussion guidelines where they are easily accessible for the participants.

Announce the opening of the discussion space in a message to other online forums, to the membership e-mail list, and to the invited experts and other guests. This message should include **dates** and **information about how to subscribe to and unsubscribe** from the discussion space.

Liaise with your technical support and other colleagues to make sure that technically and organizationally everything is fine before you declare the discussion space “open”.



Organizing discussion

"Opening" the discussion space

Example

Date sent: Fri, 04 Jul 2003 19:09:13 +0200
From: "Karl Notony (IWN)" <iwnkn@apc.org>
Subject: [Apc-content] Monday - Online Portal Event
To: Apc-content@bluelink.net

Dear IWN members,

Starting next Monday, a three week online learning event will be taking place on this list. The event will be based on the study "Understanding Civil Society Portals", realized by APC one year ago in cooperation with five model CSO portals (full text of invitation to the learning event at the bottom of this message).

The invitation to the learning event has been distributed to number of CSOs and CSO networks and many of them signed up for the learning event. They will be subscribed to the list temporarily for the event and we hope they will take active part in the discussions.

You are all very welcome to participate! However, we thought you should be informed that we expect high traffic on the APC Content list during next three weeks. If you, for any reason, do not wish to participate in the learning event and do not wish to receive messages from the list during this period, you can disable mail delivery to your e-mail address at address at <http://bluelink.net/mailman/listinfo/apc-content> bluelink.net.

Best regards,
Karl Notony

Organizing discussion

Welcoming, introducing and orientating members to the discussion

Let the board welcome everyone to the discussion and introduce you as the facilitator of the online meeting.

Your first message to the meeting should include the following information:

- **Welcome;**
- **Purpose of the meeting;**
- **Duration of the meeting;**
- **Where to find support documents;**
- **What the participants can expect from this meeting.**

The purpose of the discussion should be absolutely clear to all participants. Without a common purpose, it will be difficult to keep all participants interested and focused.



Organizing discussion

Welcoming, introducing and orientating members to the discussion

Dear APC Learning Event participants,

Welcome to the "Understanding Civil Society Portals" APC Online Learning Event.

This learning event is based on the study "Understanding Civil Society Portals", realized by APC one year ago in cooperation with five model CSO portals - ItrainOnline.org (international), WomensNet.org.za (Southern Africa), UruguayTotal.com (Uruguay), Rabble.ca (Canada) and ChangeNet.sk (Slovakia).

Focusing on findings from the five in-depth case studies and short reviews of dozens of other sites, the study provides an overview of the different approaches to setting up and managing civil society portals and practical tips for portal builders. It outlines common challenges that often emerge plus a set of basic planning tools that will help organizations in the process of building or upgrading their own theme-based sites.

LEARNING EVENT TOPICS INCLUDE: *What types of civil society portals exist and what purposes do they serve? * What are the portal business models? * Which model would best suit your organization? * Sharing experiences, plans and find solutions for your challenges. For more information about the focus of the event, download the study "Understanding Civil Society Portals":

http://www.apc.org/orc/Understanding_Portals.pdf

Summaries from everyday discussions will be published on the summary page: <http://intranet.apc.org/projects/iwn/> , from which you can also access the portal case studies. Please note that the page is password protected. Your login and password are: iwnkn / 8823WGYS.

WHERE THE EVENT WILL HAPPEN: The learning event will take place in the main APC content online workspace which includes about 70 ICT professionals from numerous APC member and partner organizations all over the world.

You are warmly invited to join the discussions and subscribe to the learning event at: <http://bluelink.net/mailman/listinfo/apc-content> bluelink.net (Bulgarian APC member BlueLink kindly hosts this workspace)

WHEN THE EVENT WILL HAPPEN:

The learning event will start on XX/XX/XXXX and will end on XX/XX/XXXX.

LANGUAGE: ENGLISH AND SPANISH. The main language of the learning event will be English. However, as is common in most APC events, posts may be made in Spanish and summaries of daily discussions will be posted on the learning event site both in English and Spanish.

SUPPORT: You can ask for support at: support@apc.org and you can find support documents at: <http://intranet.apc.org/projects/iwn/> .

** When you are sending your contribution to the list for the first time, please insert a line about yourself, the organization you come from and your experience with portal building/management.

Looking forward to hear about your work

Karl Notony

Organizing discussion

Introducing rules and discussion guidelines

Introduce in a separate message:

- **rules**, about how to subscribe and unsubscribe; who can participate; how decisions are taken (e.g. how to decide to move on to a new point on the agenda); and
- **discussion guidelines**, also known as netiquette (from "*Internet etiquette*"), what is polite behaviour in an online space; what is not acceptable; and how the facilitator may deal with unwanted behaviour from participants.



Put the most important information in your message and summarize the rest. Make the complete document available online.

Organizing discussion

Introducing rules and discussion guidelines

Example

Dear participants,

I would like to summarize the rules for using this on-line space:

- Only messages related to the topics of discussion should be posted to the learning event address (Apc-content@bluelink.net). If you send your message to this address, it will be distributed to all 160 participants of the learning event.

Please, use this e-mail address with care.

- All other correspondence - questions, private comments and messages - should be send directly to the address of the facilitator of this event (my e-mail address) - iwnkn@apc.org .

Thank you.

Looking forward to read more of your contributions.

Karl Notony

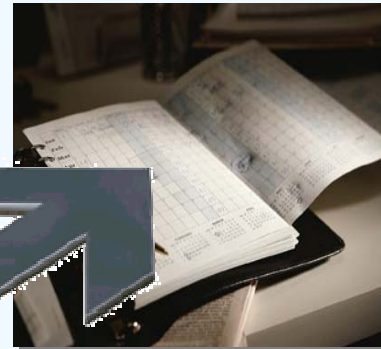
Organizing discussion

Reviewing and approving the agenda

Present the provisional agenda to the group and ask for immediate feedback.

Revise and approve the agenda and present a revised time schedule if necessary.

Reserve some time at the end of the agenda for unexpected new topics that may come up during the meeting.



Organizing discussion



Do you think the agenda or work schedule should be decided by the facilitator alone, as she/he is responsible for the meeting?

Yes

No

Please click on the answer of your choice.

Organizing discussion

You are assigned to be the facilitator of a discussion in an online community of roof garden specialists. Below are some of the steps you can take to prepare yourself. Put them in a logical order.

- Write the welcome message and the discussion guidelines.
- Make yourself familiar with the purpose of the meeting.
- Introduce yourself to the technical support person, discuss the meeting, and exchange contact information.
- Open the discussion space.

Please order these items using the drop-down boxes and press "Check Answer".

Dealing with technical problems

One of the responsibilities of the facilitator is to ensure that the technology doesn't interfere with the group's communication and information sharing.

Basic **technical problems** are the following:

- downloading and opening files and attachments;
- bounces (messages sent back to the sender);
- vacation messages;
- spam and viruses.

These problems are typical of a mailing list, but there are comparable issues with other online tools.



Dealing with technical problems

Downloading and opening files and attachments

Dealing with problems with downloading and opening files and attachments is one of the most common technical issues you will confront.

There are several ways to deal with attachments. Some discussions allow attachments, others don't. It is sometimes possible to have a discussion Web site where files can be posted and downloaded instead of being sent as attachments.

Dealing with technical problems

Bounces

If you are using listserver software for your online discussion, you need to deal with messages that are bounced back to the sender because they come from an e-mail address that is not known to the discussion list.

People who have several e-mail addresses often forget under what address they are subscribed to a certain discussion.

Help people who make this mistake understand what the problem is.

Dealing with technical problems

Bounces

example

Date sent: 17 Feb 2005 04:00:12 -0000
From: MAILER-DAEMON@mta7-1.us4.outblaze.com
To: mmtk@apc.org
Subject: failure notice

Hi. This is the qmail-send program at mta7-1.us4.outblaze.com. I'm afraid I wasn't able to deliver your message to the following addresses. This is a permanent error; I've given up. Sorry it didn't work out.

<lina.cosm.com@mail.cosm.com>:

Error 01373: User's Disk Quota Exceeded.

Sorry, your intended recipient has too much mail stored in his mailbox.

Your message totalled 2 Kbytes.

However a small (< 1Kb) message will be delivered should you wish to inform your recipient you tried to e-mail.

Dealing with technical problems

E-mail vacation messages

Some participants may use vacation messages (or "Out of office" messages) when they are away for some time from their e-mail.

Help people to understand that these automatic messages, such as "*Hi, I am away from my desk and I can't reply to your e-mail message*", should preferably not be sent to the whole discussion list, only to the person who has sent a message. They can contact their system administrator and ask for help.

It is not always possible to completely prevent these vacation messages. If they become a problem, the only real option is to start moderating the list in order to hold these messages before they are posted to the list.

Discourage participants from responding to vacation messages with flames or complaints to the list, as this only aggravates the problem of off-topic messages.

Dealing with technical problems

Vacation messages

example

Subject: Out of the Office
Date sent: Fri, 13 May 2005 10:50:07 +0900
From: "Maria Subane" <marsubane@apc.org>
To: undisclosed-recipients;

Thank you for your message. I am on leave from the 1st to the 30th of May. For urgent enquiries please contact Vassiliki Stefou: vasstef@apc.org

Dealing with technical problems

Spam and viruses

Spam is unsolicited or unwanted messages sent by e-mail. Spam can occur when people subscribe to your online space under false pretexts.

A **virus** is a programme or piece of code that is written to deliberately produce an unexpected - usually negative - event, and to reproduce itself without the knowledge of the computer user. Viruses can damage hardware, software, or information.

In a mailing list or even in online discussion spaces, viruses can easily spread via infected attachments.

Dealing with technical problems

Spam examples

Subject: Top replica designer clothes
Date sent: Fri, 13 May 2005 09:54:07 +0900
From: mmtk@apc.org
To: undisclosed-recipients;

The VERY BEST designer clothes Replica's on the web ...

<http://www.designerclothesreplicas.com/>

Subject: Let's be having you!
Date sent: Fri, 18 May 2005 11:54:07 +0900
From: Pete Red [mailto:pete.red@dogtraining.com]
To: undisclosed-recipients;

100 Tips And Secrets To Use In Your Everyday
Dog Training, That Can Cut Training Time By Up To 80%

[To learn more click here](#)

Dealing with technical problems

- 1) preparing for and organizing discussion
- 2) dealing with technical problems
- 3) closing discussion space and follow up

How do you deal with technical problems?
Before the discussion starts, it is important that:

- you are **familiar with the software** used for the online discussion;
- you know your **technical support contact person** and how to reach him/her;
- you have a good strategy on keeping **spam and viruses away** from your online space;
- you provide help documents or FAQ files available to help participants in using the technology;
- you encourage community members in longer term communities to assist each other;
- if your discussion takes place within a particular period, make sure you have **technical support on stand-by**, especially in the first hours and days of the discussion, which is when problems tend to arise.

Finally, it is a good rule **to face each technical problem immediately** and inform the participants that you are looking into the problem.



Dealing with technical problems

Can you match the following technical problems with the correspondent definition?

Undeliverable messages that come back to the sender without being posted.

Bounce

Unsolicited or unwanted messages, such as advertising, usually sent by unknown persons.

Spam

Click on each option, drag it and drop it in the corresponding box.

When you have finished, click on the Check Answer button.

Closing discussion and follow up

The three week online conference is coming to a close. Announce the last day of discussion and highlight items that still need attention. Then it is time to close the discussion...

The last messages you share with the online community need to include the following:

- thanks, to all participants;
- a final summary of the meeting (see below); and
- information about possible follow-up.

You can also provide a list with decisions, as well as a pointer to a contact person or Web site where an archive of all the messages or the documents discussed or produced during the meeting can be found in the future.

If the community continues, as is the case with your association, you can invite all participants in the discussion to continue as members of the online community. Unsubscribe participants who do not want to continue. Remember to **provide information about how to unsubscribe** from or join the online community at a later date.



Closing discussion and follow up

Example of a closing message

Dear APC learning event participants,

A special topic is prepared for today: The end.

Although we are formally ending this event, we believe that you still have ideas and experience relevant to civil society portals, that could be shared with others. This space will be open for your comments until the end of this week. After that, the [APC-content] on- line conference will again be reserved for the members of APC Information Workers Network.

(If you wish to leave this space before, go to
http://bluelink.net/mailman/listinfo/apc-content_bluelink.net)

The summaries of all contributions will be added to the Learning Event page in two weeks.

For information about further action from the discussion please contact Jane Ross at jane.ross@apc.org.

Many thanks to all, who shared with us their experience and knowledge about civil society portals, their building and management!

Hoping to meet you online again soon!

Karl Notony

Job aids

From the interactive lesson you can download and print documents that can help you in your work.



Preparing and organizing the discussion, detailed activities



Dealing with technical problems, detailed activities



Facilitator support tasks work plan - Worksheet



Summary

The type of online setting (e.g. a time-limited online event or an ongoing discussion group) decides the roles and responsibilities of a facilitator.

A facilitator has some core responsibilities that are independent of the type of online setting.

Those responsibilities can be divided in two categories:

- support tasks; and
- facilitation tasks.

Support tasks concern:

- preparing for and organizing the discussion;
- dealing with technical problems; and
- closing discussion space and follow up.

If you want to learn more...

ITrain. Mailing list facilitation: How to support people working together online
http://www.bellanet.org/itrain/dsp_document_dl.cfm?doc_file_id=53

Kim, R. Online Moderation
<http://www.eldis.org/tales/discuss/moderation.htm>

Berge, Z.L. The Role of the Online Instructor/Facilitator
http://www.emoderators.com/moderators/teach_online.html

Full Circle Associates. Online Community Toolkit.
<http://www.fullcirc.com/community/communitymanual.htm>

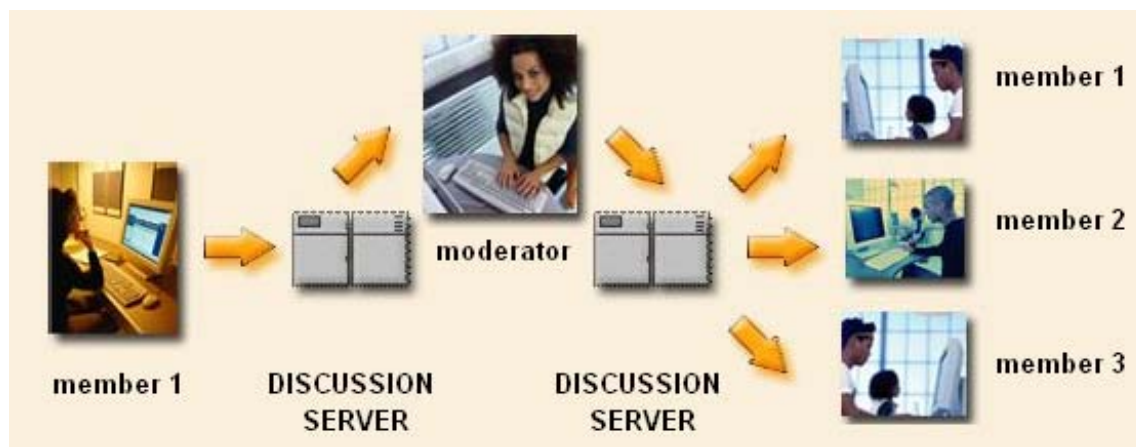
James, M. and Rykert, R. From Workplace To Workspace: Using e-mail Lists to Work Together
http://web.idrc.ca/en/ev-9369-201-1-DO_TOPIC.html

McNamara, C. Facilitation – Face to Face and Online (resource collection)
http://www.mapnp.org/library/grp_skill/faciltate/faciltate.htm

Annex 5.4.1 Mini-lesson: Moderation

What is Moderation

A discussion is moderated when every message is first screened or approved by the facilitator.



There are different levels of moderation and your choice of moderation depends on:

- the purpose of the discussion;
- the accessibility of the discussion space; and
- the participants.

It is also possible that the participants themselves have the responsibility for moderation. This type of moderation is not discussed here, but in the Resource Section you can find some links to examples.

Tasks of the moderator

As a moderator, your tasks are the following:



- to **enforce the guidelines** that everyone on the list is aware of and has accepted;
- to refuse messages that have the potential to instigate conflict.

In some cases, you may choose to edit the message in order to take out the part that may lead to conflict.

You can also decide to ask a member to rethink or rephrase certain comments in order to de-personalize critique and to find constructive ways to move the discussion forward.

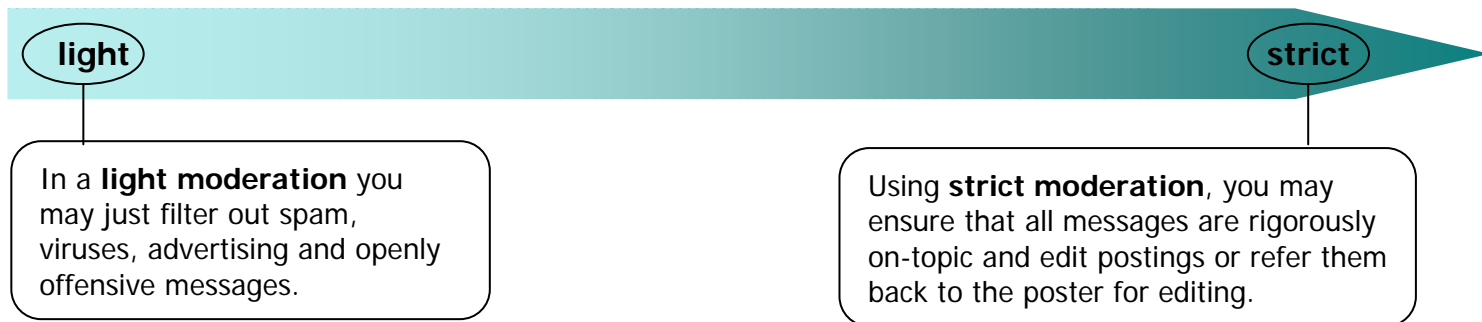


Moderation can become a political issue as some participants may see moderation as a form of censorship.

Moderated discussions

Moderation is an aspect of the discussion setup that everyone automatically accepts when subscribing to the discussion list.

There are different **degrees of moderation**...



In a **light moderation** you may just filter out spam, viruses, advertising and openly offensive messages.

Using **strict moderation**, you may ensure that all messages are rigorously on-topic and edit postings or refer them back to the poster for editing.

With strict moderation it is possible to prevent most of the common problems related to online discussions.

If a person sends a message that contains a flame, that is off-topic or that can lead to conflict, the facilitator should not approve the message and if possible interact privately with the person who posted the problematic message. As the facilitator, you will ask this person to rephrase or shorten the message.

This is only possible on small discussion lists. On a very active, moderated list you may not have time to interact off-list with the sender of every single problematic message.

Strengths and weaknesses



STRENGTHS

- helps to keep the discussion focused.
- prevents the posting of messages that can seriously damage the inclusive and productive atmosphere you try to build in an online community.
- strict moderation prevent most of the problems related to online discussions.
- protect larger public lists from a very high risk of spam, viruses and automated "out of office" replies.



WEAKNESSES

- strict moderation can prevent problems but it may also take away from the spontaneity and creativity of the discussion.
- strict moderation may shift the scene of conflict from the discussion space to the facilitator's mailbox when moderation is perceived as undemocratic or even censorship.

Annex 5.4.2

Mini-lesson: Setting the Agenda

You might need to set an **agenda or schedule of work** for the online discussion in your community. Just as when people gather at a face-to-face meeting or a workshop, some structure is required in an online meeting for you to complete the tasks at hand.



Your agenda will depend on:

- the **purpose** of your discussion; and
- **how long your online space will exist for.**

It is best to develop the agenda together with key participants or team members.

Think of the goals and objectives of the group, how much time you have, and what activities need to occur for the group to achieve the goal. The facilitator helps the group achieve their purpose.

Setting the agenda

In order to set an effective agenda, you need to accomplish the activities described below...

- State the overall outcome that is expected from the interaction.

- Design the agenda so that participants get involved early by having something to do.

- Write next to each major topic:
 - the type of action needed;
 - the type of output expected (decision, vote, action assigned to someone);
 - how much time you think it will take to address the topic.

- Ask participants if they'll commit to the agenda.

- Send the agenda to the list and make sure it is always accessible.

- Remind members of where you are in the agenda and provide summaries.

Clarifying expectations

All members of a community will bring their own expectations:

- some of them will be personal...
- others will be more aligned with the collective goals of the community...

I would like to find out more about how other people work.

I expect to contribute to shaping a policy on rural women's economic empowerment.



In order for those expectations to met, you will need to draw them out.

Chances are, the community will not be able to meet all members' expectations. Nevertheless, it's important to acknowledge all expectations and **clarify which expectations will be met** and which will not.

Clarifying expectations

The best way of drawing out expectations is simply to ask!

Here is an example of a message asking members for their expectations of the online interaction:

Hello everyone!

It is a pleasure to be in this working group and to have such an array of regions and talent present. Not only are members of our global and regional networks present; we will also have input from our new Regional Content Managers. We look forward to developing content together for the Food Security Portal.

Let's introduce ourselves briefly so that we know:

- * who we are working with
- * where everyone is from
- * what do you hope to gain from participating in this discussion – in other words, what are your expectations?

Thank you!