

# **Information Management Resource Kit**

## **Module on Building Electronic Communities and Networks**

### **UNIT 5. ONLINE FACILITATION**

#### **LESSON 5. FACILITATION TECHNIQUES**

##### **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.



© FAO, 2006

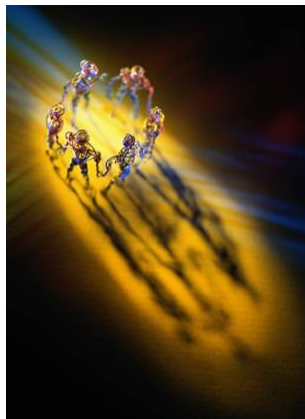
## Objectives

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

- identify the principal facilitation techniques for managing online discussions.



## Introduction



Facilitation of an online discussion is for the most part the application of techniques.

This lesson introduces some of the main facilitation techniques to help you develop an overall approach to meet the specific needs of your community.

## Introduction

Some facilitation techniques may work out differently, depending on the particular situation.

For instance:

- You may need to deal with some participants and their contributions in a particular way because of their status, gender, age or communication style;

**Example 1** - If the community includes both senior managers and more junior staff, you may need to emphasize that everyone has a "right" to participate in the discussions, and make special efforts to encourage junior staff to make their voices heard.

- The topic of discussion may also influence your use of facilitation techniques.

**Example 2**- A discussion on "HIV/AIDS and food security" may touch on religious or cultural taboos as well as on participants' personal circumstances, and will need particularly sensitive facilitation.



It is important to keep a constant **check on your own values and assumptions** as well as possible cultural sensitivities among the participants.

Knowing how to apply facilitation techniques at the right time and in the right way is something that you will learn by experience.

## Introduction

The most important techniques, which apply to most facilitation situations, are the following:



• **Listening/reading;**



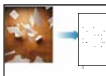
• **Composing and editing messages;**



• **Asking and answering questions;**



• **Clarifying; and**



• **Summarizing and synthesizing.**

Let's analyse them in detail...

## Listening/reading



**Listening/reading is the most important facilitation technique.**

As a facilitation technique, listening implies:

- listening to what is “said” (written), but also to **how it is “said”**;
- **reading between the lines**, understanding what is not said directly;
- **interpreting silence**. People may not respond because they agree or they don’t understand, or maybe because they are upset.

### Why silence happens

Silences in your online community can indicate that members...

- are at a loss as to how to continue;
- feel they have nothing to say;
- are busy;
- are silent because they feel shy or intimidated;
- are not yet a cohesive group and diversity in the group is silencing some (for example language issues, or rural/urban, or unequal comfort with technology);
- do not have regular access to their e-mail;
- they are in agreement.

## Composing and editing messages

As long as online discussions are mainly text-based, writing **clear and unambiguous messages** is key to preventing friction and misunderstanding in your online community.

As a facilitator, you need to compose messages in an appropriate way and help participants in learning how to do the same (for example, using your group’s discussion guidelines).

In order to compose a clear message, take into account the following suggestions about its **length** and **content**:

- keep messages **short and to the point** and include only relevant parts of the message you are replying to;
- use a **descriptive subject heading** or keep the same subject heading if you are replying to a message (see box);
- use **unaccented text** (i.e. do not use “special” characters such as é, ñ, ¿ because some people’s computers will not display these letters and punctuation marks correctly); and
- put one key idea per message, don’t overfill your post with too many issues or ideas. Most people only take in the first one.



### Subject headings

If participants make mistakes with the subject headings, in a moderated group the facilitator can choose to rename them in order to organize messages under the same subject heading.

### Composing and editing messages



Sometimes you may be tempted to re-edit the content of a message, for example because you might think that it is not clear enough...

**Editing someone else's message without that person's explicit permission is not recommended!**

You can reject a message on the basis of the discussion guidelines and:

- send it back to the originator with a reference to the discussion guidelines;
- send it back to the originator and suggest discussing how the message can be edited in order to be more acceptable.

### Asking and answering questions

Questions and answers is a technique to get or to keep a discussion going. **Asking good questions makes it easy for participants to respond.**

When the participants are not very familiar with each other yet, it is sometimes easier to respond to questions about other people and other situations than questions about their personal experiences and about this online community...

- Ask questions about past experiences or joint experiences in order to build common ground;
- Ask participants to respond to something you know they may not agree with; and
- Ask questions that are directly connected with the topic under discussion, this will help to keep the discussion focused.



Keep the number of questions in a single message to 2-3 maximum. Asking a lot of questions in a single message can be overwhelming to people, and they may not respond.

## Asking and answering questions

The facilitator can ask different **kind of questions**:

• **open-ended**, tend to start with "how", "what", "when", "where" and are used to stimulate an answer that doesn't stop at "yes" or "no", but must be more extensive;

Why do you agree or disagree with this statement?  
How do you understand today's task?

• **clarifying**, tend to start with "which", "why", "do you mean to say..." etc. and are used in order to clarify concepts; and

Do you mean to say that you agree with this statement?  
Is the task for this session clearly understood?

• **closed**, used only occasionally, can be answered with "yes" or "no" and are posed to get specific information.

Does everyone agree on the priority for today's task?  
Does everyone understand the task for this session of our discussion?



Asking good questions

<http://www.ced.appstate.edu/~goodmanj/3850/webquest/questions.html>

## Clarifying



Before you can summarize or synthesize, you may need to make sure that everyone understands the ideas or opinions in the same way. If you feel there might be some points of misunderstanding, it is important to test for understanding and **clarify** ideas or opinions if needed.

Seeking clarification is important, especially if you need to build consensus around the use of important concepts or when there seems to be a misunderstanding between participants.

## Clarifying

There are several ways to ask for clarification:

- **paraphrasing:** restating an idea or point in your own words, in a clear manner. Paraphrased text is often also shorter than the original text. Paraphrasing is a good technique to check the meaning of an idea with the sender of the idea or opinion;

- **restating:** ask participants to restate their opinions or ideas using different words;

- **illustrating:** ask participants to give examples to illustrate their ideas or opinions.

## Clarifying

### Paraphrasing, restating, illustrating

#### Original text (participant A):

Keeping information gateway content regularly updated is much easier if the editor responsible for a topic is either working directly in the area, or personally passionate about it. If you know the topic thoroughly, are active in the area, and are subscribed to a lot of relevant listservs and newsletters finding new resources is not a chore. In general new resources come to you, you check them out as part of your "normal" work, and add them to the portal. From time to time you search for new materials, but the searching is easier because you have a clear framework for formulating your search. By contrast, if an editor is "not" personally or professionally active in the topic for which they are responsible regular updating becomes more difficult, and the contributions are likely to be of a lower quality.

#### Paraphrased text (facilitator)

A has said that it's easier to keep the content of your portal updated if editors are responsible for topics they work with on a daily basis, so they come across new content regularly, or if they are personally passionate about the topics. If they are not "involved" with the topics they are less likely to update content actively and accurately.

#### Restated text (participant A):

What I'm trying really trying to say is if that if editors don't keep up-to-date with the topics covered in "their" section of the portal - either because it's part of their jobs, or because they have a burning personal interest - your site won't be great.

#### Illustrated text (participant A):

For example, the "building online communities" section of our portal is maintained by a volunteer. She's doing research on online communities, and constantly comes across new resources, so that section of the site is really dynamic. On the other hand, I maintain the section on web development - and I don't have time to keep up-to-date with developments, so that section is not updated as often as it should be.

### Clarifying

Match each facilitation technique with a situation in your online community...

The discussion on a topic seems stuck on two opinions and you want the community to move on to the next topic.

Use questions and answers to provoke responses.

The online meeting has started and the agenda has been approved, but there are no responses to the presentation of agenda point 1.

Summarize, synthesize, and ask the community if this represents the discussion.

A participant has posted a message with a statement that can be interpreted in different ways.

Clarify concepts, paraphrasing the statement.

Click on each option, drag it and drop it in the corresponding box.  
When you have finished, click on the Check Answer button.

### Summarizing and synthesizing



Summarizing and synthesizing are important techniques in online meetings and conferences:

- **summarizing** is putting the main ideas and points of a discussion or text in your own words (summaries are significantly shorter than the original texts); and
- **synthesizing** is bringing two or more ideas or points together into one new idea or point.

Summarizing and synthesizing help to bring a discussion around one topic to a close in order to move on to the next topic.



### Summarizing and synthesizing

A group of people are discussing a new outreach strategy for the National Association of Dairy Farmers. Try to identify the common threads - ideas or points - in the following texts...

Participant A writes:

*"I don't like the idea of a handout. Not everyone who receives it will be interested in our association. It will just be a waste of money (and our efforts). I was thinking more of a Web site. Everyone can see it and it hardly costs anything."*

Participant B writes:

*"I like the idea of a brochure. My cousin is on the board of the beekeepers' association. At conferences and meetings she brings the association's brochure. It has some very beautiful pictures of how the honey is produced. She talks to everyone and actually met some people who now sell the association's honey."*

- 1) The first common thread might be about the **effective use of resources** in producing a handout in the outreach campaign or it might be about understanding **how your target gets information**.
- 2) The second common thread it could be about **who will be reached** by the campaign or about researching **how other organizations have done their communications**.

Please write your answer in the input box and press "Check Answer".

### Summarizing and synthesizing

Looking again at the posts of *Participant A* and *Participant B* in the discussion about a new outreach strategy for the National Association of Dairy Farmers: now, try to summarize their content and tie them together.

Participant A writes:

*"I don't like the idea of a handout. Not everyone who receives it will be interested in our association. It will just be a waste of money (and our efforts). I was thinking more of a Web site. Everyone can see it and it hardly costs anything."*

Participant B writes:

*"I like the idea of a brochure. My cousin is on the board of the beekeepers' association. At conferences and meetings she brings the association's brochure. It has some very beautiful pictures of how the honey is produced. She talks to everyone and actually met some people who now sell the association's honey."*

The two posts tied together show that both participants say something about the costs and the effectiveness of a handout. Participant B mentions something very important for this discussion: his cousin's association has a brochure with nice pictures which has helped her connect with people. This increases the effectiveness of the handout.

Please write your answer in the input box and press "Check Answer".

### Summary

The main task of a facilitator during an online meeting or discussion is using facilitation techniques to move the group towards reaching its objectives.

The principal facilitation techniques are:

- Listening;
- Composing and editing messages;
- Asking and answering questions;
- Summarizing and synthesizing;
- Clarifying.

### If you want to learn more...

King, M. ; Cowan, R. Tips on Facilitating a Social Change E-mail List  
<http://democracygroups.org/maillinglisthowto.html>

ITrain. Mailing list facilitation: How to support people working together online  
[http://www.bellanet.org/itrain/dsp\\_document\\_dl.cfm?doc\\_file\\_id=53](http://www.bellanet.org/itrain/dsp_document_dl.cfm?doc_file_id=53)

ITrain. List Facilitation; Community of Practice  
[http://www.bellanet.org/itrain/materials\\_en.cfm](http://www.bellanet.org/itrain/materials_en.cfm)

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

James, M. and Rykert, R. From Workplace To Workspace: Using Email Lists to Work Together  
[http://web.idrc.ca/en/ev-9369-201-1-DO\\_TOPIC.html](http://web.idrc.ca/en/ev-9369-201-1-DO_TOPIC.html)

McNamara, C. Group Dynamics: Basic Nature of Groups and How They Develop  
[http://www.mapnp.org/library/grp\\_skill/theory/theory.htm](http://www.mapnp.org/library/grp_skill/theory/theory.htm)

Reich College of Education , Asking good questions.  
<http://www.ced.appstate.edu/~goodman/3850/webquest/questions.html>