

# ONLINE FACILITATION

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## KNOWLEDGE MANAGEMENT BRIEFS

*These briefs are written to support USAID and partners with Collaborating, Learning, and Adapting (CLA) throughout the Program Cycle. They utilize experience from the KDMD project to share good practices, how-tos, and lessons learned about concepts and activities related to knowledge management and learning.*



The USAID Knowledge-Driven Microenterprise Development (KDMD) project designs and implements state-of-the-art knowledge management (KM), learning, and collaboration tools and approaches and promotes collaboration among practitioners to speed innovation and adoption. KDMD seeks to maximize the impact of USAID's knowledge and learning investments, and implements strategies and processes to coordinate learning and knowledge sharing across the full range of investments and activities for our USAID programs.



## ABOUT ONLINE FACILITATION

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USAID's work requires collaboration with staff, implementing partners, and stakeholders around the world, and virtual meetings and events are vital for effective operations. Having an effective facilitator for online events helps ensure that the agenda flows smoothly, key messages are conveyed, and participants feel welcomed, connected, and engaged. Just as they are for in-person events, facilitators are necessary for online events to help participants reach their goals.

This document provides guidance on online facilitation drawn from experiences from the Knowledge-Driven Microenterprise Development (KDMD) project.

### Types of Online Events

Online events can be categorized as synchronous or asynchronous. Synchronous events occur when all participants are engaged simultaneously. Examples of synchronous online events include:

- Webinars
- Online meetings
- Live online courses/training
- Webcasts/video conferencing of a live event

Asynchronous online events occur when participants access information through an online platform at different times.

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Examples of asynchronous events include:

- Multiple-day, online discussions
- Collaborative group spaces for communities of practice and working groups
- Online training modules (e-modules)

Online facilitation requires different levels of engagement and can take varying forms depending on the type of event and the level of interaction desired. It is important to think through possible facilitation requirements during the planning stages.

### **The Role of the Facilitator**

An online facilitator typically performs a number of roles during an event. These include:

**Managing the agenda:** The facilitator should provide structure to the online interaction and manage participant expectations by communicating the agenda and objectives.

**Providing assistance with technology:** Although facilitators do not need to be experts, they should be able to help participants with the systems and software being used for the event.

**Setting the tone:** Facilitators help set the tone for the online event through their interaction with participants.

**Providing validation and feedback:** Without visual cues, online participants are often unsure whether their comment or question has been noticed or heard. Facilitators should provide frequent recognition and feedback to encourage continued input and communication.

**Listening:** A facilitator should actively pay attention and see that participants' questions are answered.

**Bringing closure:** At the end of the event, the facilitator should close the session by letting participants know what to expect next. Will there be follow-up activities? How can participants ask questions or continue the conversation?

**Synthesizing responses:** Effective facilitators are able to quickly weave together common themes and relay them back in a synthesized form.

### **Preparation**

Planning is key in holding an effective online event. It is often assumed that planning for an online event takes less time than planning for an in-person event. In fact, planning online events takes as much, if not more, time than in-person events due to additional considerations, such as technology. It is not as easy to improvise during an online event since facilitators and participants are not able to react to visual cues. Similar to an in-person event, a well-planned online event begins with an agenda and a storyboard.

#### **Seven Keys to Great Online Facilitation**

1. Communicate clear goals and objectives
2. Understand the environment
3. Know the audience
4. Listen and observe
5. Encourage engagement
6. Monitor timing & flow
7. End on a clear note



## Roles and Responsibilities

Establishing roles and responsibilities for the event is critical. Ideally, the technology support role is separate from the facilitator role to allow designated team members the opportunity to concentrate on one specific aspect of the event. The KDMD project has established roles and responsibilities for its webinars that include the following:

### Technical:

- Sets up hardware
- Ensures that technology is working correctly
- Works closely with remote presenters (as applicable) to ensure that they can speak and hear
- Conducts audio tests with participants at the beginning of the event
- Addresses technical questions throughout the event

### Primary Facilitator:

- Welcomes participants and introduces the agenda
- Provides information about related or upcoming events or resources
- Addresses logistical or process-oriented questions from online participants
- Manages Question & Answer session, as needed
- Instructs participants to fill out the online survey at the end of the event
- Thanks participants and provides information about next steps

### Content Facilitator or subject matter expert (Optional):

- Greets participants or colleagues as they come online
- Synthesizes key points
- Provides links to related resources
- Contributes to or facilitates Question & Answer, as needed
- Works with online participants to clarify content-related questions

## Skills

Effective online facilitators often have the following characteristics:

**Good listener:** Actively listening to participants allows facilitators to weave together major themes and address questions.

**Hospitable:** A facilitator plays an important role in setting the tone of an online event. Being welcoming and hospitable helps to put participants at ease and encourages conversation.

**Relationship builder/connector:** One of the objectives of an online event should be to bring people together around a specific topic. Facilitators can help to do this by making connections among participants and helping them to recognize how their contributions feed into the larger discussion.

**Non-judgmental:** A facilitator should aim to be as neutral as possible and should treat all participant contributions as important. In the case of an unclear or controversial statement, facilitators should remain non-judgmental while steering the conversation in another direction.

**Flexible and quick on the draw:** Online events are dynamic and a facilitator must be able to react



quickly to address different scenarios. These could include unexpected questions from participants or technical glitches.

## HOW-TOS

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### Synchronous Online Events

#### Beginning:

**Prepare:** Online facilitators should be familiar with the agenda and content before the event. Understand the objectives and refer back to them throughout the event. Review any presentations as well as the participant list to anticipate possible questions. Compile a list of relevant resources and be aware of any post-event products or follow-on activities to share with participants.

**Set the tone:** First impressions matter. Welcome participants in a positive and energetic way. A great way to engage participants during an online event is to have them state their name, title/position, and from where they are joining the webinar.

**Orient participants:** Take some time to provide a quick orientation of the platform that is being used for the event. The more comfortable participants are using the online platform, the more likely they will be to participate during the event. Direct participants to any additional resources and let them know how to communicate any issues that they might have during the event.

#### Middle:

**Engage with participants:** The facilitator must remain very aware and active throughout the event. Capture questions or comments made by participants and filter them to the proper recipient. Take note of the key takeaways that are

made during the discussion to bring up at the end.

**Manage Q&A:** One of the primary roles of facilitators during an online event is to manage the Q&A segment. At the beginning of the event, provide instructions to participants on when and how Q&A will be handled. During the event, select questions, re-phrase (if necessary), and communicate them to presenters.

#### End:

**Thank you and next steps:** Facilitators should be sure to thank presenters, participants, and any other contributors to the event. They should also be prepared to provide a brief summary of the event and highlight key takeaways. If there is an online survey, remind participants to fill it out and inform them on how you plan on following up. Other questions to consider at the end of an online event can include:

- What can participants expect in regards to unanswered questions? Will these questions be answered at some later point in time?
- Will there be post-event products or a final report? If so, how can they access it?
- How long will the online platform where the event was held remain accessible?
- Are there plans for future events?
- How can participants continue the conversation?

### Asynchronous Online Events

Facilitation for asynchronous online events is similar to synchronous events except that engagement can take place at any time, typically through email or online notifications. For asynchronous online discussions, make sure to



post messages taking into account the time zones of different participants (if applicable). Consistency and frequency of communication is very important for asynchronous online facilitation since participants do not interact with one another in real-time.

## LESSONS LEARNED AND GOOD PRACTICES FOR FACILITATORS

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- ✓ Arrive early to set up your computer, troubleshoot any technology issues, and prepare for the event.
- ✓ Greet participants as they come online. A personal greeting (by name if possible) is a nice touch to make participants feel recognized and engaged.
- ✓ Ask participants to introduce themselves to others online during the beginning of the online event.
- ✓ Specify that participants provide their name, organization, and geographic location when submitting a question.
- ✓ If participants are not able to speak during an online event, make sure that they have some way to interact with one another and with the event organizers. Chat pods are a great way to provide a way for participants to share thoughts, ask questions, and raise any technical issues.
- ✓ Take note of questions from participants in a separate document (i.e. Microsoft Word) so that you can easily prioritize and combine (if applicable) questions that will be shared with the presenter(s).
- ✓ If possible, utilize content facilitators in addition to the primary facilitator. Content

facilitators can be put in charge of specific aspects of the online event (for example, Q&A) and provide important feedback to participants while the primary facilitator ensures the event flows well.

- ✓ For large events, consider having more than one facilitator (with clear and separate roles) to help address any participant issues and to assist with Q&A.

### Resources

The KM4Dev Knowledge Sharing Toolkit:

Synchronous Web Meetings:

<http://www.kstoolkit.org/WebMeeting+Tools>

Asynchronous Web Meetings:

<http://www.kstoolkit.org/Asynchronous+Web+Meetings>

Adobe Connect FAQs:

<http://www.adobe.com/products/adobeconnect/faq.html>

The International Association of Facilitators (IAF) Database of Methods: <http://www.iaf-methods.org/>

Designing Interactive Webinars by Julia Young:

<http://facilitate.com/support/facilitator-toolkit/docs/Designing-Interactive-Webinars.pdf>

Look Behind You! The Webinar Facilitator's Non-Technical Checklist:

<http://welearnsomething.blogspot.com/2010/02/look-behind-you-webinar-facilitators.html>

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