

Online Facilitation: It's not just for Geeks anymore!

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Abstract -

Online facilitation is an evolving art and opportunity to empower group interaction across time and distance. Online group dynamics create unique conditions and opportunities calling for techniques beyond those traditionally used face-to-face. Come explore online facilitation for virtual groups and for supplementing face-to-face purposes.

- *From Webster's: Facilitation \Fa*cil'i*ta"tion\, n. The act of facilitating or making easy.*
- *From Wordnet: facilitation n: act of assisting or making easier the progress or improvement of something*
- *"to free from difficulties or obstacles"*
- *"to make easy or easier"*

Why Host or Facilitate Online?

Online communities and virtual workgroups do not always "happen" spontaneously. They require care and nurturing: facilitation. The core of facilitation and hosting is to serve the community and assist it in reaching its goals or purpose. Some describe this role as a gardener, a conductor, the distributed leadership of jazz improvisers, a teacher, or an innkeeper. It can be this and more.

Levitt, Popkin and Hatch, in their article ["Building Online Communities for High Profile Internet Sites"](#) wrote, "Communities are organic in nature and site owners can't **make** them successful or **force** them to grow. As site owner can only provide the fertile ground on which a community may grow, and then provide some gentle guidance to help the group thrive. Much of the challenge in fostering an online community is social, rather than technical."

Facilitation is a balance between functions that enhance the environment and content, and functions that protect the members from harassment. It involves the sacred rituals around freedom of individual expression while preserving something of "the common good." It is juggling, tight-rope walking, often without a net. The distance to the hard cold ground varies with the community or group goals. The clearer the [purpose](#), the easier it is to craft the facilitation approach. Purpose provides participants and facilitators expectations upon which they can base their actions.

Hosts or facilitators (I'm using the terms interchangeably for this generic introduction, but there are distinctions that could be made) foster member interaction, provide stimulating material for conversations, keep the space cleaned up and help hold the members accountable to the stated community guidelines, rules or norms. They pass on community history and rituals. Perhaps more importantly, hosts often help

community members do these things for themselves. Without someone taking on these responsibilities, it is easy for an online space to get sidetracked, disrupted or simply abandoned.

Who is the Host or Facilitator?

The online host or facilitator can be the community owner, or someone designated by the community owner. Small communities may have just one, while large online spaces with many conferences and topics use teams. In the past, many hosts have been unpaid volunteers in the social communities, where facilitators in online work groups often draw from the team. Facilitators may be a team leader or outside contractor.

What do Online Hosts and Facilitators Do?

Facilitators and hosts encourage member interaction and participation. But their most important skill is as a genuine, authentic communicator. In a text environment, that means people at ease reading and writing with care and clarity.

Facilitators and hosts in offline situations have certain established roles providing leadership, focus, stimulation for group interaction, support, team building, refereeing, dealing with problems, timekeeping, responding to member feedback and group regulation. These may also be needed online, but there are also differences due to the primarily text-based nature of the environment. Communication has a few more challenges, plus there are the advantages and disadvantages of electronic tools.

Facilitator approaches depend on the nature of the community. Some communities, such as conversational "salon-style" communities, need a very low-key "host." Some need very clear and rapid responses, or distinct leadership qualities. Others need facilitators to help raise the overall skill level of the community to facilitate itself.

To get a sense of some of the variety of host or facilitator roles, you may wish to read first hand from [Hosts on Hosting](#). As you consider your role compared to theirs, you will probably find that you are doing a combination job, utilizing skills from all areas. And it varies over time as a community matures and members start to take on various roles. People have created many metaphors to describe the role of online facilitator that help us visualize the roles. Here are some examples along with links to resources:

The Social Host - The social host or "host as innkeeper" is the most well-known online facilitation model originating out of long time discussion communities like [The Well](#), [Electric Minds](#) and [Salon Table Talk](#). As a dinner host brings together the elements of a successful party, a social host helps create an environment where the members feel comfortable to participate. Part conversationalist, part counselor, part role model and sometimes even part bouncer. They are also usually *part* of the conversation.

Applications include:

- social, conversational communities
- helping entrants feel "at home" and acclimated in work groups and communities of practice
- customer service

Key skills include:

- greeter
- social skills
- conversation stimulator
- Sometimes utilizes a persona or a "character."

The Referee - Good cop or bad cop, this is the role of bringing attention to and/or enforcing community norms, rules and procedures. Referees help the community regulate, protect members and deal with problems. For example, if a community has a policy of no posting of advertising, the host has the job of deleting offending posts and asking the poster to refrain from posting ads. The clearer the rules, the easier the job. Likewise, where there are no clear rules, this job is often perceived as authoritarian and arbitrary. Referees are often not "regular members" who are "just part of the conversation," but a role apart.

Applications include:

- social, conversational communities
- topic oriented discussion groups
- customer service
- workgroups

Key skills include:

- thick skin and a slow fuse
- net experience
- familiarity with common netiquette

The Project Manager - In communities with a strong task, work orientation or subject focus, the project manager pays attention to adherence to focus, timelines, task lists, commitments and process. This can be a leadership and/or support role. This can be aided by the use of static web pages to organize information, the combined use of linear and threaded conferencing space, and the regular use of summaries and reviews. Skills include traditional project management and organizing.

Applications include:

- Virtual work groups and teams
- Online events (especially time-delimited)

Key skills include:

- traditional project management skills
- writing and summarization skills
- technical skills such as HTML to create information and summaries with visual impact.

The Cybrarian - Cybrarians represent the gift of knowledge and information. They are "topical" experts. Cybrarians help members find information internally and externally of the community. They organize information and make it accessible. And they stimulate interaction with the introduction of or pointer to new and relevant information.

Applications include:

Virtual workgroups and teams

- Topic-oriented conversation communities
- Help desks
- Distance learning settings

Key skills include:

- web-savvy research
- strong organizational bent
- love of learning and information

The HelpDesk - In communities where there is an ongoing influx of new members, there is often repeated need for simple help pointers on using the software or understanding the community purpose and guidelines.

Applications include:

- E-Commerce and service organizations
- Larger communities where new folks need help with the software

Key skills include:

- technical understanding
- patience
- clear communication skills

The Janitor - It can get messy in cyberspace, as we leave our words in conferences and topics. The Janitor tidies up forgotten topics by freezing and archiving, redirects activity if it is in the wrong area, and generally tidies up.

Applications include:

- any community with multiple spaces

Key skills include:

- familiarity with software
- attention to detail

The Town Council - The emergence of governance structures in online groups has given rise to roles that approximate those of "mayor" or "town council." Whether elected, appointed or self-appointed, this type of facilitator generally operates based on a set of community rules or norms. Again, the more explicit the norms and expectations, the easier to fill this role.

Applications include:

- Emerging in a variety of settings

Key skills include:

- procedural experience (i.e. Roberts Rules of Order)

Co-Hosts

In some communities there are co-hosts/facilitators. This can be very helpful in busy or large communities where one person cannot cover all the territory. It allows the work to be spread out when volunteers are used. Co-hosting can also provide training opportunities, pairing an experienced host with a new host.

Hosts as Role Models

Hosts and facilitators are the most emulated members of a community -- no matter if they are modeling positive or negative behaviors. They are often the first members to be challenged. Integrity, patience, a good sense of humor and a love of other people will be valued in any host. And as virtual communitarian Howard Rheingold so aptly wrote, "One point of heart is worth ten points of intellect."

One thing to keep in mind when playing multiple roles in a community that people may not know what role you are "playing" at any one time and react in ways you might not anticipate. Facilitators might see themselves as also "just members" of the community. Members may not. This distinction becomes critical when there is cause for intervention or problem solving. No longer will you be perceived as "just a

member." And in some cases, you will never again be considered in that role. You are most often held to a higher standard.

Learning Online Hosting and Facilitation

Most people get their training "on the job." But now you can do more to prepare. There are web sites and course to inspire and guide you. Check out [Full Circle Associates Online Community Resources](#). You can also participate in an existing community and seek out experienced hosts to observe. Many are generous with ideas and can be mentors. [The Electric Minds](#) community provides members a chance to co-host, to get support as hosts with a topic devoted to hosting, and has established a mentor system for new users to the system. This range of support allows the community to "grow their own" hosts and provide some backup for existing hosts.

You can also participate in forums and listservs like [OnlineFacilitation](#) created for online hosts and facilitators. Similar forums exist on other community building systems.

Understanding Member Roles and Behaviors

We all know that humans will be, well, humans. Just as in offline community spaces, there are a range of behaviors that community hosts will encounter. These mirror offline behaviors, but manifest differently in the text only environment. Without the non-verbal cues, we can misinterpret a person's actions online. Likewise, one voice can be very loud. Good stuff really is great, and difficult stuff can be awful. It helps to understand some of the roles that members take on so you can anticipate and appropriately respond to different situations. For a idea of what you might expect, check out [Community Member Roles and Types](#) (See also [Getting and Retaining Members](#).)

Rules of the Road - Civility Please!

When you first structure your community, one of your options is to specify your community norms, rules or procedures. In addition, if your community is on a web-based provider like Delphi Forums, you also have to abide by the overall system rules.

The most important aspect to community guidelines and rules are that **they are clearly communicated** to members.

Some communities thrive under very loose, minimal rules. Others have more stringent requirements. The trick is to have the rules that work for your community. Here are some things to consider:

- Are there audience-related issues, such as presence of children, which would require certain standards?
- Is this a public or private community?
- Does the target audience have an existing set of norms, rules or guidelines that would work online (such as scouting groups, or religious groups)?
- Does the topic matter attract potential problems (politics, religion, etc.)?
- Are there any issues of libel or liability? This is an emerging but unclear area.
- Do you want members to play a role in deciding and enforcing rules? A "voting" or other group decision-making structure?

Case Study: Electric Minds Rules of the Road

The Electric Minds community has a set of rules, fondly called "[The Rules of the Road](#)" which were developed by the community's original founder, Howard

Rheingold. Central to the rules are two tenants: "You Own Your Own Words" and "Assume Good Intent." The most important expression of these rules is the behavior and role modeling of the hosts. Many people never take the time to read the rules, but they read their manifestation every day in community behavior. Bottom line: live by your stated rules and guidelines!

Engagement and Reciprocity

When it comes down to the bottom line, people like to be recognized. They enjoy giving in an environment where they are appreciated and can anticipate others will respond in kind. This pattern of engagement and reciprocity is at the core of all online hosting and facilitation. Howard Rheingold noted in a 1996 Inc. Online chat "All communities happen between people, not on computer screens. It turns out that sociologists have been arguing about what "real" community is for a long time. I strongly believe that people who spend time together online can only become a community if and when they reach beyond that screen and have some effect on each other's lives." Engagement and reciprocity help people discover how to interact more meaningfully online. Here are some tools and ideas.

Welcoming newcomers/Greeting/Directing

Every new poster should have a response to their initial posts. There is nothing worse than sending out a signal (post) and getting nothing back. Some hosts like to send a welcoming email to new members upon sign up or first post. Others offer new folks a mentor or guide to "show them around."

Creating personal profiles

Encouraging members to create personal profiles gives everyone in the community a tool to get to know other members. Encouraging members to view others' profiles, and keeping their own profiles up to date helps build a sense of community. Profiles may vary quite a bit, depending on community purpose. Some communities may promote the use of personas or "pseudos" while others strongly depend on people representing their "real" selves. Communities sometimes profile a member a day or a member a week to help people get to know' each other and to give members their own "spotlight." Permission from the member is a must and privacy issues should be respected.

Creating topics that support engagement & reciprocity

Sometimes people are hesitant to jump into ongoing conversations and more intense topics. Having fun, game-like topics provides both a testing ground to familiarize new members with the platform and a safe place for those first posts. Some traditional online fun topics include:

- Just Three Words - the rule is that your post can be no longer than three words
- One Word Thread - Even easier -- just one word!
- Group Stories - Start a never ending story with each poster adding a section. Can be a take off of fairy tales or a more limited format such as limericks or group haiku.

Starting conversations

As a community matures, some ongoing conversations either start recycling as new members join, or become cliquish or closed. By regularly starting new topics and conversations, a variety of members can be engaged or reengaged.

Providing Content (Cybrarianship)

[Using Content to Support Your Community](#) Give 'em something to talk about. Provide a variety of relevant content if appropriate to your community's purpose, such as relevant news stories about topics of interest, web resources or quotes.

Responding to Member Feedback

Members are the best source of ideas to strengthen and grow communities. Seek their opinions and ideas actively and often!

Encouraging subgroups

As communities mature, you can keep "old-timers" engaged by providing the space and tools for them to create their own subgroups. These might come in the form of offshoot conferences, special interest groups or even new communities.

Expectation management

Nothing sends a new member away faster than being disappointed. Promise only what you can deliver, then over deliver a bit. Don't set expectations that can't be met. Be fair and consistent in the application of rules and norms. This is essential to building and maintaining community trust.

Pacing

Getting a sense of the rhythm and pacing of a conversation is a facilitation art that improves with time. Sometimes the most important thing you can do is step back and let the action happen. Other times you need to light a fire, or cool a fire. Most experienced hosts say that doing less is often more. Sometimes you just need to step back and let the members drive. This dynamic varies with purpose. Keeping people on topic or focus is a much larger job for a facilitator in an online workspace.

Rituals and Special Places

One of the hallmarks of offline community over the ages have been their rituals and rites. Online spaces can benefit from these as well, especially long-term and socially oriented communities.

Backstories

Amy Jo Kim, author of [Community-Building on the Web](#) has identified "backstories" or the community history as an important aspect to community rites and rituals. A community's history and creation story can provide a strong heart to the group, and should be clearly communicated to members on static pages, in welcoming messages and as part of initiation rituals.

Rituals and Rites

Rites and rituals, celebration of special events and member milestones can help bring members together and feel like a group or community. Rituals might include new member initiations, rituals for elevating members to formalized volunteer roles (greeters, cybrarians, guides) or simply a place for people to note it is a birthday, anniversary or special event and allow other members to "celebrate" with them.

Special Spaces and Places

The use of special topics for community rites and rituals can help communicate these aspects of a community to members and build new rituals along the way. There might be topics just for building community legends and stories, topics to honor service to the community and other forms of recognition. Personal reflection or journal topics are helpful "special places" in work and focused discussion

communities and serve as a place for each member to keep track of their learnings, and yet not divert the main discussion threads.

Initiations and Formal Community Roles

As communities grow, members can take up leadership roles such as facilitation, greeting and serving as cybrarian. To recognize these efforts and to ensure they are meeting the needs of the community, the roles can be defined and recognition can be given to volunteers through initiations. The initiations can also serve to increase the member's knowledge of the community, its roles and rituals.

Dealing with Problems

Into every community a little rain must fall. Because of the limitations of a primarily text-based environment, misunderstandings can compound small problems as well. On the other hand, diversity can invigorate and keep a community growing and healthy. So defining and dealing with "problems" is as much art as it is skill. Much of the "problem behavior" you will encounter will be inadvertent. Assume good will!

The most difficult skill for a facilitator is knowing when to become involved. Heather Duggan of Big Bang Workshop wrote "Attention is the coin of cyberspace. Attend to those things you want to encourage and do not attend to those things you want to discourage." Ignoring some things can be a better solution in the long run than head-on confrontation. It is common for people to "defend" themselves. If they are not put in this position, they may let go of a potential conflict and move forward.

Sometimes things "look" like problems, but are in fact the natural dynamics of conversation between certain members. Other times, subtle signs may be warning of bigger problems. Most experienced online hosts suggest that for the most part, erring on the side of standing back is often the best route. This is different in certain environments, depending again, on the purpose of the community. Large, high traffic sites like [CNN](#) have very clear rules and when an infraction occurs, action is immediately taken. It is more about keeping some order than building strong interpersonal relationships in the community.

Here are some basic troubleshooting techniques.

Working behind the scenes

If a member is violating community guidelines, or other members have expressed concern, you can start by trying to clarify the situation by email. This can save face for the member in question as well as for the host/facilitator.

Working 'live' in front of the community

Some communities value knowing what is going on and may be less trusting of "behind the scenes" interventions. When working a problem in front of the community, it may feel as if you are working "without a net." The stakes increase as people's reputations are put on the line. If problems are resolved in public, there should be a clear procedure.

Hiding or Deleting/Erasing Posts

When members post something that is against community guidelines (spam, obscenities) host can either hide or erase posts. Posts with large sound or image files may be hidden to keep from slowing down the systems of users with slower Internet connections. Erasing posts should only be done in extreme circumstances, and for clearly stated purposes, to avoid issues of censorship.

Banning

Banning is when a member is denied access to a community. Members should only be banned according to the stated processes of a community. In private communities, this is fairly easy to do. In public communities where members can register with free email addresses, this is not always an effective solution. Some communities just try and ignore posters who have the sole intent of disrupting a community, known as "shunning."

Helping and Housekeeping

Keeping the online space organized and uncluttered helps members find what they are looking for. Members need pointers and assistance in using the software.

The degree of housekeeping needed depends on the purpose of the community. Work spaces might be more "organized" than social conversation spaces. Here are some housekeeping tools and tips:

Providing technical assistance and the HELP files!

New and old members often need help with technical aspects of a conferencing system. New members should have access to a mentor or guide and then be taught to use the HELP files for the hosting system. Seasoned members sometimes need reminding of how to use less-used features, including the HELP files!

Hiding, or moving posts

Large files embedded in posts can be hidden to avoid slowing the system of users with slower Internet access. Posts can often be copied and moved if they belong in a different topic. Guidelines on post hiding/deleting/moving should be stated and understood by the community.

Pruning topics (archiving, read only)

Old topics never die, they just get archived. Inactive topics can be "frozen" so no new posts can be added, and they can also be archived, which means they will no longer show up on the active topic lists. They can be brought back or "unarchived" and "thawed" as well. By keeping inactive topics pruned, conferences can focus on the active topics and kept robust.

Organizing stuff/Summaries

In outcome oriented communities, it helps to summarize threads and post the summaries for easy access by community members. One of the downsides to linear conferencing is a phenomenon known as the "tyranny of recency over relevancy." We bury our gems in subsequent posts and unless someone mines for these jewels, they are effectively lost to the community.

Links to Facilitation Resources

Virtual Community Facilitation

[The Art of Hosting Good Conversations Online - Howard Rheingold - the quintessential guidance for conversations centered spaces](#)

[Gail William's Online Community Building Concepts - "almost proverbs"](#)

[Hosting Online Conferences](#) Good

[Lisa Kimball - VC Tools](#)

[From Big Bang Workshops...Hosting](#)

[The WELL Hosts' Manual](#)

[Forum One Guide to the Web-based Discussion Forum Sector](#) - excellent site to explore who is doing what with online communities

[The Moderator's HomePage](#) This is starting to be dated...

[Lisa Kimball's facilitation links](#)

Other Interesting Links

[Online Community Resources from Full Circle Associates](#)

Biography

As founder of Full Circle Associates, Nancy helps people connect through online and offline strategies, with a particular focus on non-profits and cause-related clients. A skilled online host and facilitator, Nancy hones her craft on both social conversational sites and focused, work-related online communities. She is a chronicler and collector of online facilitation resources, constantly seeking to understand "what works and why" in this evolving world of online communities. Nancy is a graduate of Duke University, the mother of 2, and a confirmed addict of online interaction and chocolate.