Moderator Guidelines

By Lisa Kimball
Metasystems Design Group (MetaNet)

I think there are several important threads to thinking about moderating conferences:

1. Initial conference structure
2. Creating the framework
3. Facilitating discussion
4. Developing the group
5. Managing content

1. Initial conference structure

It is important to distinguish at least 2 different ways of thinking about a discussion and its content.

If you look at a discussion *after the fact* it is possible to draw from it a number of different topics and threads which can be sorted into different cubby holes (or conferences) to make the material make sense as a data base ... or information library.

However, *before* a discussion takes place, it is difficult to anticipate where the energy will be and what turns the conversation will take. Most groups of people do not converse in "library mode" but rather in a more integrated way. Although there are some basic categories of possible conversation - e.g. questions about the system vs. curriculum content - it is usually not effective to set up many pre-selected slots for discussion.

I've seen a lot of systems with elaborate conference structures of infinite topics...most of which have one or two notes in them ... Usually there is one "catch all" conference which turns out to be where people are really having a good time and getting some valuable material. If you bifurcate a discussion too much it's *very* hard to get any momentum going because there are too few people and too few ideas spread out over too large a field.

I think it is more effective to have a *very* simple conference structure and moderate a multi-topic conversation agenda-style rather than trying to maintain a library (where everyone's always putting stuff in the wrong place - grin). Additional conferences can be used when it is *clear* that there is a critical mass of people and material for a narrower discussion. The thread to date can be summarized and used to "seed" a new conference at that time *after* the group has de facto created themselves as a sub-group.

2. Creating the framework

One of the most important things a moderator does is create the framework for discussion. This means setting out an interesting agenda, raising key questions, suggesting threads of discussion, and generally laying out some ideas about where the discussion can go.

It is usually a good idea to think about creating a series of opening notes which move from a description of the broad topic and purposes for the conference to one or two specific suggestions for what to talk about first.

The beginning of a conference can often be stimulated by an initial question to which *everyone* can contribute ...something which can be drawn from people's experience rather than their "expertise."

While creating the framework, it is important to clarify the role of the moderator and the participants for this particular conference. Sometimes the moderator is the "teacher" for a group on a specific subject. Sometimes the moderator is a "facilitator" and the group is expected to fill in the content. This should be made clear at the beginning. Unless it is an in-house group who know each other very well, it is helpful for the moderator to introduce themselves...very much the way they would if the conference was taking place face-to-face.

Moderators should expect to put a lot of energy into the initial stages of a conference to get it off to a good start.

3. Facilitating discussion

We could write a book on this! A helpful thing to remember is that facilitating a discussion online is not that different from facilitating a discussion in any context.

You need to help people get started, give them feedback, summarize, weave the contributions of different folks together, get it un-stuck when necessary, deal with individuals who are disruptive or get off the track, bring in new material to freshen it up periodically, and get feedback from the group on how things are going and what might happen next.

And, just like other contexts, you'll want to communicate with the group as a whole, sub-groups, and individuals to encourage participation. In a face-to-face conference, a moderator can have quick conversations with folks during coffee breaks. Online, this takes the form of private messages to individuals or small groups.

Sometimes you may want to defuse an argument which is not constructive or move a thread which is only interesting to one or two people into the private mode through messages so it won't gum up the public conference. If you haven't heard from someone in a while you'll want to send them a message to see what’s up. When I moderate a conference, I find that I send many more private messages than public ones because I don’t want to have the conference be moderator-dominated but want to interact with everyone as much as possible. Depending on the group or application, I send mail and make phone calls too!

Next to getting and giving feedback with participants, I think the most important facilitative activity is constantly summing things up to help folks keep making sense of the discussion. I usually create periodic summaries to which I can direct new folks joining a discussion after it has started so they don’t have to read all the backlog before joining in.

4. Developing the group

The most often missed opportunity online is the development of the "group" in a discussion. You know how much more effective a discussion can be when there is a feeling of comraderie and mutual caring in a group. Because the online environment can be "remote", folks can forget that when they turn off their machine, there is still a "group" out there.

It is important for the moderator to help with group development in many ways. Folks need to know "who’s here" ... that means some form of "going around the electronic room" to introduce ourselves. Even when that is done at the beginning, it’s important to remember to encourage new joiners to pop in a self-introductory note to the group.

It’s good to establish the norm that if someone expects to be offline for a while - like on vacation or whatever - they put a little note into the discussion letting folks know that. Otherwise, people will think that they’ve gone away mad .. or become bored ... or rejected the group in some way.

I also feel that it is important for moderators to encourage people to let others know when they are reading along - even if they are not saying anything. The subject of "lurkers" is a hot one among moderators. But I think we all agree that people appreciate it if people say "Hey - I’m enjoying this although I don’t have anything particular to say about it right now" rather than just silently riding along. Good conferences require lots of good input from a range of people - and that will fade away if the folks who are contributing feel like they are talking to themselves.

I think groups online also benefit from the bonding experiences which help cement any group - celebrating someone’s birthday, talking about various event in the news, having an online holiday bash, sharing a joke, etc. People sometimes feel like written communication has to be completely *serious* ... and that can also make it very *dry* ... I think people communicate better about important stuff if they also have a degree of social comfort with each other.

5. Managing content

Managing the content of a discussion is tricky. The structure of the conferencing system provides one resource to help a moderator figure out how to keep moving things around so they make sense - when to start a new topic, when to archive a past discussion, when to close off one topic and start another.

It helps to continually ask yourself 3 questions:

- Is the discussion in this conference *moving* along in that people are bringing up new things or is it going around in circles or over and over the same ground?
- Is this discussion *interesting* and does it motivate particpation?
- Would someone joining this discussion now be able to find their way around?

It is essential to summarize discussion regularly to provide a place for it to "start fresh" or move on.

I often send a copy of my summary note to participants who haven't been active lately as a private message. I also direct new participants to the most recent summary and suggest that they start there.

I think it is also important to change the subject when things lag even if there are still notes dribbling in ... A juicy piece of new content can sometimes liven things up...a quote from a recent article, a summary of a recent happening, a description of a new product or service. While it is true that online networking allows *everyone* to participate in this way, the moderator needs to take more responsibility for making sure that there are always fresh ideas to chew on. Also, people feel like they are getting something of real value if they see your conference as a place to get new ideas on a regular basis.