

Conducting Virtual Facilitated Discussions

Introduction

Virtual technology is now routinely used for meetings of large, multi-location organizations (Vandenburg and Reese, 2011), and shows great promise for bringing together geographically dispersed participants in facilitated discussions, as long as participants are familiar with the technology and comfortable using it. In most instances, it makes sense to conduct facilitated sessions in a face-to-face setting, where the facilitator can pick up on visual cues and possibly move people around to break down barriers to communication. Still, in our electronic era, tools for holding discussions via the internet are becoming increasingly user-friendly, access to broadband is increasing, and a broader base of the population is comfortable with web interactions. A web-based discussion can be a natural strategy to cope with time or travel cost constraints.

As technology plays a growing role in community development, facilitation processes that take advantage of virtual technology have become an important resource for the community development practitioner's tool kit. Facilitated discussions are critical to planning group activities or working through problems. Focus groups rely on solid facilitation processes, and are a well-established method in social science and applied research. They are commonly used to gather detailed information about organizational practices and issues (Krueger and Casey, 2009.) Comparative research has shown that focus groups provide more in-depth information than surveys and are more efficient at eliciting different types of information than individual interviews (Morgan 1996). The main unique strength of focus groups is the ability to gain insight into complex behaviors and practices (Morgan and Krueger, 1993).

This article compares different approaches and software for using virtual technology to facilitate discussions with geographically dispersed participants. Our focus here is on synchronous discussions as opposed to threaded discussions or social network broadcasts available in online social media venues such as FaceBook, Twitter, or blogs.

Authors:

Scott Loveridge, Ph.D.

Director, North Central Regional Center for Rural Development

Stephanie Nawyn, Ph.D.

Dept. of Sociology, Michigan State University

Lisa Szmeczek, Ph.D.

Center for Bioethics and Social Sciences in Medicine

Michigan State University

Contact: c/o Scott Loveridge

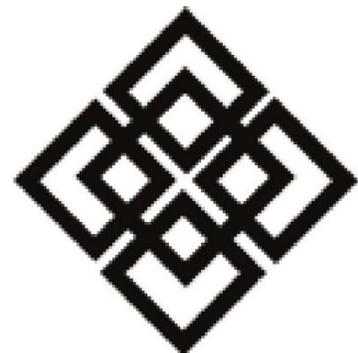
North Central Regional Center for Rural Development

446 W. Circle Drive, Room 66

East Lansing, MI 48824

Phone: (517)-432-9969

Email: loverid2@msu.edu



Observations in this article reflect upon two efforts to bring geographically distributed groups together for web-based discussions that drew on participant expertise and common interests. We offer the observations to help practitioners ask critical questions and make careful choices about both the tools and processes they use in similar circumstances.

First we provide a brief overview of two examples of virtual group situations and lay out how we structured the sessions. We then discuss advantages and disadvantages of two software packages available to conduct virtual sessions. Finally, we share important process considerations based on our experiences in structuring web-based group interactions, and pose questions that might be examined in future research to support the field.

Two Virtual Group Settings

Table 1 provides basic information on the settings for our observations. In both situations, the object was to foster connections and draw information from participants, but audiences and circumstances were very different. The first drew together community development professionals to discuss the dynamics of community leadership styles; the second aimed to create a peer network across eight communities implementing community-based entrepreneurship programs. We provide more detail about each situation below.

Summary of Virtual Groups

	Example 1: Discussing Leadership Styles in Local Community Development Groups	Example 2: Creating Entrepreneurial Community Clusters
Purpose	Document techniques for adjusting facilitation styles to “personalities” of voluntary community development groups	Create dialog and a peer network across geographically distributed groups working on community entrepreneurship
Audience Description	Seasoned professional group facilitators (employed by non-profits)	Members of eight volunteer community-based entrepreneurship teams
Recruitment Method	Key informants recommended participants, who received email invitation. Participants could select one of two sessions.	Open to program participants only
Audience Location	Their own workstation	Community meeting place
Methods	Slide show, polls, status emoticons, open-ended discussion questions	Slide show, break-out sessions (groups discussed at remote sites with local moderator); chat box
Connection	Webinar plus conference call (participants at their desks)	Webinar to eight regional meeting sites (no phone)

Table 1: Summary of Virtual Groups

Example 1: Discussing Leadership Styles in Community Development Groups.

To explore leadership dynamics and elicit information about methods of working with different group types, the North Central Regional Center for Rural Development convened a national webinar to gain insights from experienced community development practitioners.

Individual leadership styles are diverse. They include autocratic, consultative and participative styles, as well as decision-making styles such as charismatic, thinkers, skeptics, followers and controllers. The individual styles of leadership influence how relationships are formed in a team (Sheard & Kakabadse, 2006).

The webinars allowed community development practitioners from more than a dozen states to comment on the practical dynamics of dealing with leadership and decision-making styles in community work. The mode of interaction during each session was a phone conference call plus a web-based presentation. Participants placed a toll-free phone call to a conference bridge, and also logged on to an Adobe Connect® meeting room via the internet. The Adobe Connect portion of the session was used to present slides to the participants and collect information via closed-ended polls.

Participants were able to remain anonymous. Access to the Adobe Connect session was open, so participants could choose to use any name for their log on. In practice, a large majority of the participants used what appeared to be their full names for their log on, and the rest used first names that appeared to be consistent with first names of people who were sent invitations. Participants were not prompted to introduce themselves when they spoke on the phone, but similar to the log-on experience, many of them chose to start their verbal remarks with phrases similar to “This is Chris Smith from Alaconia State University.” From this entirely voluntary behavior, we conclude that the respondents felt unfettered in the web plus conference call environment. The fact that the questions centered on non-controversial topics (how many years’ experience) or techniques they had developed to do their jobs better probably contributed to the willingness to engage without anonymity.

The session moderator showed slides to present information about the purposes of the study and to provide a detailed description of several hypothesized leadership group types. This person also served as facilitator in both sessions. Polls were inserted into the slide discussion at

regular intervals to collect information about the participants and their observations about the communities with which they had worked and to encourage participation in the subsequent discussion. Respondents were not shown poll results until after voting was closed.

To encourage participants to think about the groups with which they had worked over the course of their careers, polls asked them to reflect upon group members’ roles, whether they experienced shifts in the geographic focus of groups, and whether the groups adopted formal management tools. Two final polls, presented after the summary of group leadership types, asked which leadership types were most common, and which type was most effective. A “cheat sheet” was posted in the notes section of Adobe Connect so that respondents could view a summary of the power structure types while voting.

After respondents voted on type frequency and effectiveness, the mode of data collection went from closed-ended voting to open-ended verbal discussion. Respondents were asked how they modified their interactions with group members in response to their leadership types, why they thought a particular type was most effective, how they deal with gender and age differences in groups, and how rural and urban groups differ. The session moderator shared a slide presenting each question and occasionally asked for more information about a particular comment.

Both sessions were scheduled for one hour mid-day on a Tuesday. In both sessions, at roughly the 60-minute mark, it was clear some people had more to say, so respondents were thanked and invited to stay on longer if they desired. The majority elected to stay on the call. Both sessions continued about 15 minutes beyond the scheduled end time.

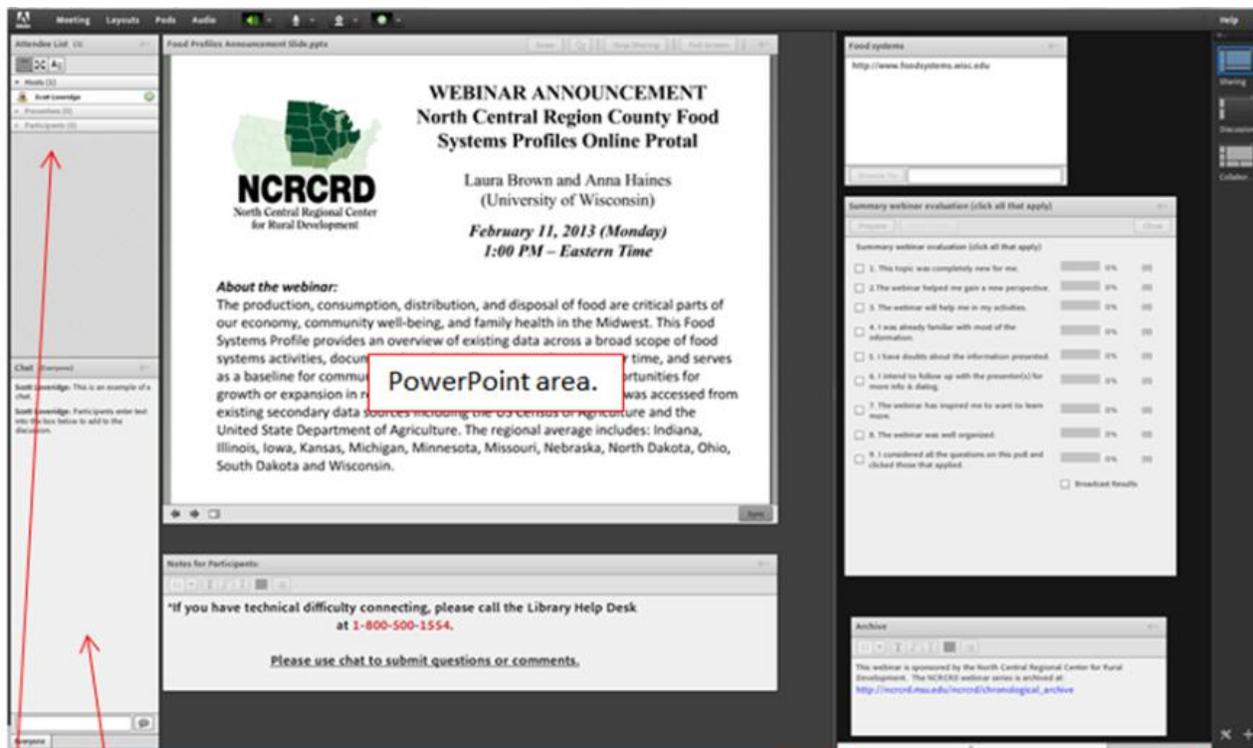
Example 2: Creating Entrepreneurial Community Clusters

An Adobe Connect session was organized as a “virtual meet-up” for clusters of people participating in Michigan State University’s Creating Entrepreneurial Communities program. The purpose of the meeting was to give teams a chance to update each other on progress, discuss each team’s strategies, and to gather feedback on a draft economic development profile tailored to each community.

Frequent travel to program-wide face-to-face meetings was problematic because many team members were

volunteers and communities were far apart. To create a more convenient way to convene the community teams, the MSU campus program team experimented with a virtual format for a program-wide team interaction six months after the initial face-to-face program kickoff session. The meeting used a blended format, with local teams travelling to their usual meeting place (typically the county seat) to participate in the virtual session. Adobe Connect slides were projected on to a screen at each local meeting place. In this way, participants had face-to-face conversations with their own team, but interacted virtually with campus-based program coordinators and the other community teams. The rationale for this approach was that teams were comfortable in their usual meeting place, and that they could “break out” with the local team leader serving as moderator to discuss the items presented.

All group-wide interaction was over the internet within the Adobe Connect system, with the campus group connected to eight remote sites. Unlike the previous example, a phone bridge was not used because the system couldn’t record phone connections under the license available at the time, and we wanted to allow teams to review the meeting via an archived version of the session. Teams were able to speak to the campus group and their peers in other communities using chat box entries to the local moderator, or by passing a microphone. Teams were identified by site and, of course, team members could easily detect who said what at any given site. Each team used the audio to provide updates on their progress and to comment about others’ plans and the profiles.



Chat box. Allows all to comment at any time by entering text into the box at the bottom. The participant’s log-in name appears next to their comment.

Host, Presenter, and Participant list. A drop-down box allows all to choose emoticons showing status, such as “ok” (check mark), “raise hand” (small picture of hand).

Presenter area. Material in this area is seen by host and presenters only until dragged left into the area with a gray background. The middle box in this area is a **poll**. The top and bottom boxes are **notes**.

Figure 1. Example of a webinar platform

In retrospect, the connection method of having local participants travel to a nearby location to view the webinar projected on to a screen was perhaps not as effective as the “at your desk” version employed in our other example. Some participants drove through a winter storm for an hour or two to attend the meeting, and were dissatisfied that they drove that far simply to look at a screen. Unfortunately, at this same site audio connections were substandard. This created a mood of dissent at one remote and sparsely populated site, and could help explain that team’s subsequent withdrawal from the Creating Entrepreneurial Communities program. Also, the single screen at each location limited participants’ ability to express their thoughts directly, perhaps reducing the range of answers received in response to team questions.

In comparing the two set ups, we recommend the more distributed format, as in the first example, so that each participant joins the group at their own workstation over the “cluster” format employed in case two – contingent on the availability of high speed connections. While breakout groups provided some valuable suggestions, the session encountered connection problems at some sites, and commentary on progress by teams about other teams was limited, possibly due to the short amount of time allocated to each team to present their projects. However, the breakout groups did produce some valuable suggestions for refining and improving the socioeconomic profiles that were to be delivered to the participating communities as part of the program.

What to Consider in Software Packages for Virtual Facilitation

While software features can change quickly, reflecting on the differences between two packages can give readers an idea of what kinds of features to seek when they select webinar software for focus groups. We assessed the characteristics of Adobe Connect and Gotowebinar. Table 2 provides a side-by-side comparison, with asterisks indicating which software currently has the most advantageous feature. Again, software changes rapidly, so check company websites or representatives for the latest feature updates before making a decision. If you are affiliated with an educational institution, check into the availability of an institution-wide site license. Both

packages are serviceable for group facilitation, but practitioners are likely to get better technical support if the package is supported by an employer. The packages are similar in that they allow participants to raise their hands, clap or provide other status indicators via a set of icons that they can select to appear next to their log on names.

The Gotowebinar software provides panelists (presenters) with a unique meeting identifier URL for entering the system. It also sends out regular reminders to invited participants. This compares favorably to Adobe Connect, because those who are not part of an organization with a site license must be manually upgraded to presenter or host status after logging on to a common URL; moreover, there is no reminder service embedded into the system. In Gotowebinar, one can imagine a situation where a guest moderator could carry out the exercise in the absence of the host, whereas in Adobe Connect, an unexpected host absence would effectively cancel the session.

The Gotowebinar software also displays the visual material by sharing the host’s screen, which presents some advantages and disadvantages over Adobe Connect. The advantage is that the material does not appear as a resized picture in Gotowebinar, so there’s more control over what participants are seeing. In Adobe Connect, the end-user’s screen size may be different than that of presenters, potentially causing some confusion. Gotowebinar, on the other hand, provides no obvious way to share control over advancing slides across multiple individuals on different computers.

We found that Adobe Connect software offers more advantages for facilitating remote discussions. The Adobe Connect system allows any presenter to advance slides, and pointer and drawing tools used in connection with the slides are easy to find and manipulate. Also, the Adobe Connect system allows hosts to overlay polls and slides, so users can see both at the same time. In Gotowebinar, presenters must remove slides to show the poll, and then a third screen must be opened to show poll results, which takes some time. Finally, results must be removed before users can return to the slides, making it difficult to refer back to the poll in succeeding slides. In contrast, the Adobe Connect system allows the host to click a box to instantly share the poll results while still showing the background slides. Adobe Connect software also allows the host to download poll answers into a spread sheet format that is linked to the participant log in name. This allows the user to analyze how questions were answered across the various polls after the session is over.

While both sessions produced some positive results, the differences illustrate why it is so important to carefully

consider what methods to choose when using technology with groups. In each of our examples, the technology brought together geographically dispersed groups, saving considerable time and travel dollars. It is quite likely that the community leadership styles group (our first example) would not have gathered at all without the technology.

In each case, it was helpful to formally present material prior to opening up discussion. This established the facilitator's "authenticity and credibility" (Gailbraith, 1992) and oriented participants to the goals of the interaction.

Polling technology can help respondents provide an opinion before asking them to dig deeper. Instant polling provides an advantage to the facilitator, who can start the discussion by asking participants to react to the poll frequencies or by asking people to state why they voted X or Y. This two-step process can overcome reticence in sharing opinions with (in these cases) strangers, because participants can see that they are not the only person holding a particular perspective. A notes page, maintained by the facilitator or a co-facilitator, can be shared with the participants in real time as they make comments. This assures participants that their comments are being

heard, mimicking note-taking commonly done on easel boards during face-to-face facilitation sessions.

While gathering input, we observed that there may be declining returns to participation in a session. While all participants seemed to vote in polls, a much smaller set contributed verbally in our first example. In the second, verbal participation was limited by the cluster approach. Breaking volunteers into smaller groups with sessions held on different days (as done in example one) invites more verbal comment by less assertive participants. Recall that both sessions in the first example ran over their allotted time due to extensive contributions by participants.

In both of our example situations, we avoided having participants speak through the internet at their own workstations. Instead we used a conference call or central convening point with high-speed internet. Even with the modified internet format in our cluster example, we encountered some audio problems. The problems would grow exponentially if multiple inexperienced users had attempted to send voice through the internet. In addition, some users may not be aware that the broadband in their area is somewhat limited—a situation that is common in rural areas or less developed countries. Also, when the limits of local broadband capacity are reached, delays in transmission of audio are possible. It is probably best

(until high-speed internet becomes ubiquitous) to rely on telephone conference for the audio portion of a facilitated discussion.

University-based, telecom, or third-party providers make it feasible to record the session separately from the recorded slide presentation. If a coordinated slide and audio recording is desired, one can place a microphone next to a hands-free telephone speaker and record the webinar via conference call. An upgraded version of the Adobe Connect software license allows bridging between telephone and the webinar system directly. The limitations of broadband capacity and user skill level prompted us to avoid web cams in both examples. As rural internet speeds increase and more people become accustomed to sending audio through computer headset, it may become more feasible to conduct sessions with participants at their workstations, without telephones. Table 2 provides a comparison of software attributes.

Conclusion

In our experience, a web-based approach can be a cost effective way to bring together geographically distributed groups to talk about a focused theme of mutual interest. Facilitating a web-based group interaction requires careful advance planning with well thought-out slides and polls to create participant interest and frame the discussion. Any interactions should be designed to minimize use of bandwidth, and should not require participant training. Coming to understand the technological limitations and opportunities of participants before planning begins is recommended.

The greatest opportunity for web-based facilitation may be for convening individuals who, through experience or study, are experts on a topic and are interested in shared learning experience (as in example 1).

To assist practitioners in honing their skills in web-based facilitation, future research might focus on questions that inform practice. What are the ideal lengths for discussions facilitated online? When are polls most helpful, and when do they detract from online facilitation? What is the optimal mix of presented content versus group discussion? How do different demographics respond differently during online discussions? What are ideal group sizes? Does a given individual have the same "group persona" on line as in person?

Webinar Software		
Attribute to Consider	Adobe Connect	Gotowebinar
Cost	*Depends on number of hosts. \$540/year for one host	Depends on number of attendees—lowest cost allows for up to 100 attendees and is \$948/year
Minimum connection speed (from company website)	Network: 1 gigabytes per second *Participants: 512 kilobytes per second	700 kilobytes per second
Presenter access	Non-subscribers must be manually upgraded to presenter	*Presenters provided with unique URL allowing automatic access to presenter controls
Email appointment reminder service for presenters and RSVP to participants	No	*Yes
Feedback on participant window size/shape	Limited (chat box feedback)	*Yes—size and shape controlled by host
Share slide advance control across two or more presenters?	*Yes	No
Overlay polls and slides?	*Yes	No
Instant poll results	*Yes—results presented with one click	Results are provided in new window that must be brought in by host
Easy pointer and drawing tools shared among all presenters	*Yes	No

Table 2: Comparison of Webinar Platforms

Limited work has been done. Researchers have explored questions with respect to online courses (Al-Qahtani & Higgins, 2012) and social relationships such as dating (Rosenfeld & Thomas, 2012). And there is some evidence that members of cultural minorities who face discrimination are more aggressive in using online fora in seeking mutual support groups (Hillier, Mitchell, & Ybarra, 2012). However, the lack of literature about online group facilitation presents an opportunity to fill a gap in our knowledge.

Internet-based facilitation approaches are not likely to supplant traditional methods of bringing people together in the same room to work through contentious or difficult local issues, but as technology evolves and software features become more sophisticated and user-friendly, we can expect web tools to become a standard component of the community development professional's tool kit.

Resources:

- Al-Qahtani, A. A. Y., & Higgins, S. E. (2013). Effects of traditional, blended, and e-learning on students' achievement in higher education. *Journal of Computer Assisted Learning*, 29, 220-234. doi: 10.1111/j.1365-2729.2012.00490.x
- Galbraith, M. (1992). Nine principles of good facilitation. *Adult Learning*, 3(6), 10-11 & 20.
- Garlick, S., & Palmer, V. (2008). Toward an ideal relationship ethic: Re-thinking university-community engagement. *Gateways: International Journal of Community Research and Engagement*, 1, 73-89.
- Hillier, L, Mitchell, K. J., & Ybarra, M. L. (2012). The internet as a safety net: Findings from a series of online focus groups with LGB and non-LGB young people in the United States. *Journal of LGBT Youth*, 9, 225-246.
- Krueger, R. A., & Casey, M. A. (2009). *Focus groups: A practical guide for applied research* (4th ed.). Thousand Oaks, CA: Sage Publications.
- Morgan, D. L. (1996). Focus groups. *Annual Review of Sociology*, 22, 129-152.
- Morgan, D. L., & Krueger, R. A. (1993). When to use focus groups and why. In D. L. Morgan (Ed.), *Successful focus groups: Advancing the state of the art*. Thousand Oaks, CA: Sage Publications.
- Rosenfeld, M. J., & Thomas, R. J. (2012). Searching for a mate: The rise of the internet as a social intermediary. *American Sociological Review*, 77(4), 523-547.
- Sheard, G., & Kakabadse, A. (2006). A role-based perspective on leadership decision making. *Journal of Management Development*, 6(26), 520-622.
- Vandenburg, L. & Reese, L. (2011). Virtual training for virtual success: Michigan State University's virtual conference. *Journal of Extension [On-line]*, 49(6) Article 6IAW2. Available at: www.joe.org/joe/2011december/iw2.php
- Whitacre, B., Gallardo, R., & Strover, S. (2013). Rural broadband availability and adoption: Evidence, policy challenges, and options. National Agricultural and Rural Development Policy Center. Retrieved from <http://expeng.anr.msu.edu/uploads/files/133/BroadbandWhitePaper.pdf>
- Al-Qahtani, A. A. Y., & Higgins, S. E. (2012). Effects of traditional, blended, and e-learning on students' achievement in higher education. *Journal of Computer Assisted Learning*. doi: 10.1111/j.1365-2729.2012.00490.x

Author Information:

Scott Loveridge (PhD Agricultural Economics) is Director of the North Central Regional Center for Rural Development and a member of the Agricultural, Food, and Resource Economics faculty at Michigan State University. He specializes in rural community and economic development.

Stephanie Nawyn (PhD Sociology University of Southern California) is a member of the Sociology

faculty at Michigan State University. She specializes in gender, migration, and community development.

Lisa Szymecko (PhD Resource Development Michigan State University) is a research associate with the Center for Bioethics and Social Sciences in Medicine at the University of Michigan, where she is exploring the role of community in health outcomes.

Editor Contact:

CD Practice is a web-based publication of the Community Development Society. It presents innovative approaches, tools, and techniques that can be readily applied by community development practitioners.
www.comm-dev.org/index.php/publications/cd-practice

For more information, contact the editor:

Joyce Hoelting, Assistant Director
Extension Center for Community Vitality
University of Minnesota
464 Coffey Hall, 1420 Eckles Avenue
St. Paul, MN 55108
612-625-8233
jhoeltin@umn.edu