Six
Leading roles

The importance of facilitators and champions

This chapter looks at:

- the role of the facilitator and facilitation teams, the essential skills and management

- transferring classroom skills online

- the importance of weaving and summarising

- NCSL's online facilitation course

- the role of community champions

Facilitation is probably the pivotal factor in the success of NCSL's online communities. At its best, it enables individuals to get the most from their membership and helps communities to thrive beyond the initial burst of enthusiasm.

> Research by Bristol University into talk2learn, NCSL's online learning communities, found that:
>
> Where facilitation is withdrawn or inconsistent, community activity often decreases. Where it is pro-active, consistent and visible, communities tend to flourish provided purpose and expectations are clear and understood by the participants.

Toolkit

Facilitator presence

Responding to contributions

Learning message

People matter most: skilled
facilitation is crucial.

The role of the facilitator

The facilitator role can be taken by different people according to the context. In a
locally based network of professional colleagues, for example, one of the members can
be a successful champion of the community, guiding the group towards shared
objectives and providing the glue that holds it together.

In a community attached to one of NCSL's leadership programmes, a tutor or facilitator
can take on a role ensuring commitments are met, while another provides support and
encouragement.

The pivotal role of e-learning facilitators and specialists encourages, supports and
enables groups such as school leaders to share their learning while maintaining a
friendly environment in which members feel comfortable about participating in
discussion, sharing information and publishing their own items. The facilitator also
provides technical support backed up, in the case of talk2learn, by a dedicated
phone helpline.

A document defining roles for individual facilitators is vital. Allotting specific tasks to
individuals exploits their expertise and experience, encourages professional
development and increases knowledge, skills and a sense of belonging within the team.

Facilitators need to be able to draw on a range of skills:

- design of community architecture and structure

- facilitation and intervention in community activities

- creation of summaries of discussions and archiving of resources

- face-to-face training in the use of your chosen software and online training for
  new facilitators

- promotion of online community processes, philosophy and effective use,
  especially in support of the organisation's learning objectives

- advice and project management

There may also be a **research** dimension to the role, covering:

- investigation of effective online communities and their facilitation

- collection and analysis of data – quantitative and qualitative – to highlight the impact of the community

- planning initiatives and pilots

- writing research feedback and action research reports

- implementation of research findings into planning initiatives and pilots

The question of the facilitators contributing their **own opinions** to online discussions arose in talk2learn. Our own practice is that as a general rule facilitators shouldn't express their personal opinion: the facilitator's main role is to shepherd discussions, playing an essential role in linking ideas, summarising and providing information where appropriate, while aiming to remain neutral throughout. It is important to consider the difference between reading and facilitating an online activity.

Toolkit

Facilitator contributions

Toolkit

Blended learning

The online facilitator e-learning specialist team at NCSL also collaborates to provide advice and consultation on the development of talk2learn and on the development of e-learning tools in the Learning Gateway, the portal to all NCSL's online learning facilities.

They have also developed online and face-to-face learning materials, an online facilitation and tutoring skills course, an online mentoring course and an online, community-based set of learning resources. Happily this practice is easily transferable to schools and other organisations encouraging facilitators to contribute to the further development of tools.

Depending on the scale of your e-learning communities, you may need a team dedicated to managing the facilitators and the infrastructure. The size of NCSL's team – there are nine e-learning specialists – means we do. This team manages day-to-day activity, oversees consistency, ensures good practice is shared and channels information between the e-learning specialists and other areas of NCSL activity to keep everyone up to speed on the latest developments.

Bringing classroom skills online

There's a perception that face-to-face and online learning and teaching are very different experiences. Because the two learning spaces look and feel dissimilar, even highly experienced teachers tend to assume that they need completely new skills to operate in the virtual world. Not knowing where to start, many simply stick to their comfort zone.

In fact, face-to-face and online learning have more in common than you might think. Most importantly, high-level teaching skills are definitely transferable between the two. Teachers who are becoming facilitators need to overcome these perceived barriers to online learning. This can be achieved by concentrating on the positive development of the skills members already possess.

The main reasons people say they struggle when working online are:

- the lack of familiar social cues

- too much time required to log on and participate

- technical difficulties with the hardware wastes even more time

By thinking about online communities in a different way, these obstacles can actually be repackaged as **advantages**. The benefits in both face-to-face and online learning environments are shown in the table below.

Characteristics	Face-to-face	Online
Social cues	Facial expression Body language	Detail in written word, images and smileys (emoticons)
Time	Limited to the regulations of the institution	Anytime anyplace
Hardware	Technical help needs to be always available	Technical help needs to be always available
Visible facilitation	Always there	Planed and appropriate regular contact with participants

Learning online has further advantages:

- the chance to reflect before responding or questioning

- the learning space is designed to fit with your schedule

- learning and teaching are visible and easily shared with others

- responses are written and, like images, are more permanent

All the things teachers and facilitators do face-to-face can be replicated online. Sometimes particular skills manifest themselves in different ways but courtesies and organisation are appropriate in both spaces.

This table describes how familiar face-to-face processes might be developed when working online. They are also the core skills for community facilitators and champions.

Process	Face-to-face	Online
Meeting and greeting	Getting to know your students and putting them at their ease	Provision of interactive tool where all participants are greeted and acknowledged
Social interaction	Allowing space for coffee-time chat	Ensuring that social opportunities are available and appropriately encouraged in all communities
Planning	Clear learning objectives that are shared	There should be learning aims and objectives for the online experience. These may be long-term, and they should be shared.
Differentiation	Prior knowledge should be established. Activities should be varied	Prior knowledge should be established. Online activities should be varied
Learning and teaching dialogue	Conversations, facilitated discussions and presentations leading to debate	Variety of facilitated forums that promote dialogue, possibly with links to other materials
Supportive	Appropriate comments from facilitators, tutors etc	Appropriate contributions from facilitators, tutors etc
Developmental	Appropriate challenge and extension in comments etc	Appropriate challenge and extension in activities, contributions etc
Collaborative learning	Effective summarising and producing finished product	Evidence by outcome – summaries, weaves, finished product
Higher order questioning skills	Evidence of appropriate language in questions asked	Evidence of appropriate language in activities and contributions

Weaving and summarising

One important role of the online facilitator (just as when facilitating learning face to face) is to draw together threads of dialogue in order to summarise and highlight key points for the group and other interested parties outside the community.

This skill of weaving and summarising online texts is something that needs to be learned over time through practice. Different facilitators may tackle it in different ways.

Toolkit

Facilitator contributions

Contributions - being effective

Threading and weaving

Weaving part way through online dialogue

At NCSL we use the term **'weaving'** to describe the process of drawing together the threads of online discussions part way through. It can help members enormously as it avoids them having to read through all contributions to get the flavour of the discussion.

There is no one set method of doing it because no two discussions are alike but weaving may have the following characteristics:

- based on typed text (rather than tables, mind maps or other representations)

- short and quick to read

- mentioning some, if not all, participants by name

- ending with a question to move learning forward further

Summarising at the end of online dialogue

Once the activity has closed, the facilitator should **summarise** the discussion to draw it to a close and provide easy reference back to the key points. We recommend that the summary remains within the community where it was created. Specific quotes from participants may be highlighted or used in the summary. Tables, mind maps and images may be included.

Confidentiality

Often, discussions that have taken place within a private talk2learn community may be of interest to others. At NCSL, summaries of a number of important hotseat sessions have been made and published on the main public web pages.

Respecting and maintaining the **confidentiality** of participants must be a top priority when presenting summaries to a wider public. A summary published outside the online community may have a very different feel and comprise:

- a combination of text, tables and bullet points, slightly longer to read

- well laid-out pages, useful to keep and refer back to in school

- very few, if any, quotes from participants, which are used **only with their permission**

- a very clear overview of the whole dialogue, encouraging others to bring their own expertise to future online discussions

- presentation of summaries in multimedia forms through use of pdf's, podcasting and video.

By creating summaries and making them available to a worldwide audience, NCSL:

- recognises the importance and quality of new knowledge generated from collaborative discussion

- contributes to the resource base on leadership

- enables those outside talk2learn to learn from community dialogue

- demonstrates the depth and breadth of community activities

- celebrates the best of online community learning in the public arena

OFAT: the course for facilitators

NCSL's Online Facilitation and Tutoring (OFAT) course has been addressing the development of the skills required for effective online learning for the past three years. Participants have praised its coverage of both the theory and practice of online learning, its stimulating content and the way it delineates each stage of successful online learning.

Toolkit

Basic facilitator skills

Training and development

" *This course has made me think about areas I had not bothered about much before, such as 'lurkers' – what to do about them and what to call them – and also revitalised issues to do with learning styles.* "

" *I considered myself to be a bit of a dinosaur where computers are concerned but I am rapidly revising this view in the light of what I have done, read and contributed through being involved in the OFAT course. I feel much more confident to lead others online and have learned lots about good practice, the theory behind it and coping skills.* "

" *It has provided a great springboard from which to develop my learning and online facilitation skills. I have become much more disciplined at participating online.* "

OFAT has **four modules**:

- Unit 1 Online/Offline: Understanding the process

- Unit 2 The role of the facilitator: encouraging participation

- Unit 3 Learning online - an individual journey

- Unit 4 Learning online - learning together

The course begins by looking at models of teaching and learning online, in particular Gilly Salmon's five-step model (Salmon, 2000 – for details see Theory section of facilitator toolkit). The first module explores how online participants need to develop **basic skills and confidence** before moving to stages of information exchange, knowledge construction and development. Discussion is encouraged through the use of talk2learn's forum tools.

- Further information is available at www.ncsl.org.uk/OFAT

Stages in growing and nurturing an online community

Stages of Community Development	What members might be saying	What tools could you use?	
Development	*"I'd like to see if we can set up a group to look at succession planning in schools, is anyone interested?"*	User initiated collaborative activities. Tools used in conjunction with each other. Taking on leadership across the educational setting you are working in.	
Knowledge co-construction		Vote Brainstorm Conversation Hotseat Debate Editable documents for shared construction Personal messages Survey	Use tools in a simple way to start with. A vote or brainstorm requires little confidence, move into tools where users are named for example conversations or debates.
Sharing information	*"Responding to Mary and John … you both identify gender issues in your comments and I think…"*		
Online socialization	*"Does anyone have a policy on gifted and talented pupils"*	Vote Brainstorm Conversation Personal messages Simple votes and surveys	As you develop the activities more sophisticated tools can be used on their own and together to construct more complex multi-stage activities. Facilitators use personal messages to support individuals and groups to engage in community
	"Hello everyone – Happy New Year – have a great 2007"		
Access and motivation	**Easy joining instructions Good reason for going online presented**	Votes and surveys Brainstorm Personal messages	

Salmon, G. (2004) *E-moderating, the key to teaching and learning online*, 2nd Edition, Taylor and Francis, London

The second module develops an understanding of the issues and approaches of online learning. Through discussion, participants begin to understand how learners can work with their tutors and their colleagues to build their common knowledge. Again, the appropriate tools in talk2learn enhance this experience and help to build users' confidence.

The third module focuses on key principles of engaging people online, different learning styles and how to encourage participation. Participants also take part in an online chat as a way of bringing in the reluctant contributor.

The last module looks at how to deal with potentially difficult situations online.

The role of champions

Colleagues who can promote and sustain the benefits of online learning are worth their weight in gold. The organisation's online community facilitator can support these **'e-vangelists'** or champions in establishing online communities and reviewing their progress. Research shows that a core of around five such champions is needed to make a community successful and sustainable.

Online community champions must have a firm idea of what they can 'bring to the party' to make the community vibrant and self-sustaining. They will also need:

Toolkit

Facilitator presence

Facilitator competencies

- time on a regular basis to develop their personal skills in the software used and their facilitation skills such as how to develop engagement

- a set of supporting tools and a specific online community to discuss with other champions learning experiences and needs

The role of the champion will vary according to the nature of the support needed and the context of the organisation. The recommendation is that the role, expectations and support be clarified during discussions with the online facilitator to cover the following points.

- What is a reasonable time you can give to the role and for how long?

- What sort of **induction process** do you need?

- What sort of regular contact will you establish with other champions to help them actively engage in the community?

- What ongoing support package do you need to help you succeed in your role?

Champions should have a welcoming personal page or space with a photo attached to give the online presence a **personal touch**. Community members should be encouraged to do likewise. Champions should also contact members regularly if they are not contributing to ensure there are no technical or other problems. Members should be made aware if champions are to be absent for any length of time.

Champions should start new conversations and pick up on side issues, evaluate all activities and, should participation levels drop, close the item and **provide feedback** to groups or individuals. They should also build trust and have fun while taking care with the use of humour and irony.

It is, of course, possible for a local or theme-based online learning community to be established and for the members never to meet face to face. However, it's fair to say that the most successful communities meet regularly. Led by the champions, they discuss and agree the purpose and **goals** of the online community and set dates for reviews and software training.

Toolkit

Facilitator presence

At review sessions, decisions should also be taken on who are potential new champions and how much time they can give to:

- helping to sustain the community

- supporting the training of others in use of the community tools

- maintaining activities such as a community bulletin board

- sustaining a clear timetable of events and tasks

- suggesting, creating and running forums on topics agreed by the group

- closing and summarising items as appropriate

- maintaining agendas and minutes of meetings

Finally

In conclusion, the so-called barriers to online learning are self-imposed by facilitators and participants – it's a question of **perception**. Rather than concentrating on the few obstacles, facilitators and participants should think about the high number of transferable skills they have and how these could be developed in new and creative ways.

For further information, references and guidance, go to **www.ncsl.org.uk/communities**.