

Facilitating Online Discussions

Heart of America Rotary Leadership Institute

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Elizabeth Usovicz, RIDE, Zones 30 and 31
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Guidelines for Engagement on Zoom and Other Videoconference Platforms

1. Sit close to the screen, and look into the camera when you are speaking.
2. Use an external microphone or headset.
3. When you're not talking, hit mute.
4. Don't eat during the meeting.
5. When you're on mute on a video call, be truly present and engaged. Nod your head. Focus on the screen. Try to avoid getting up, or disabling your video.
6. Avoid sitting with a window behind you. Face a window, or use up lighting.
A little effort on lighting goes a very long way.
7. When you're talking, speak slowly. Honor the one-breath format for comments and questions.
8. Use a workstation or laptop with a camera. And if you're using a laptop, don't put it on your lap.
9. Follow the hosts' guidelines for using chat and hand raising
10. Be patient with the technology, yourselves and facilitators.

These are generous. They're effective. And almost no one puts in the effort to consistently deliver on them. It's worth it.

[Modified from: Seth's Blog](#) blog site: seths.blog

[Zoom & Skype call tips \(the secrets of video conferences\)](#)

Facilitating Online Discussions with District Leaders and Club Members

What We'll Discuss and Share

- **Planning a Zoom Session**

 - Facilitating Conversations vs. Presenting vs. Tasking
 - Content Management and Time Management

- **Creating an environment for participants**

 - Effectively using Zoom digital spaces and tools
 - Facilitator's experience vs participants' experience

- **Creating Conversations: Getting Good at Asking Good Questions**

 - Polling, hand-raising chat and breakouts
 - Structuring questions

- **Feedback and Take-Aways**

 - One Breath Feedback
 - Lessons Learned and Shared Tips



Facilitating vs. Presenting vs. Tasking

Facilitating	Presenting	Tasking
Question-based	Information-based	Activity-based
Person-to-person (you to you) discussion	Presented via document or deck (I to you)	Peer breakouts or small groups (we)
Builds discussion on the experiences of the participants	Provides content for facilitating	Allow participants to apply and refine understanding
Gathers continual feedback from participants through the dialogue	Gathers feedback through Q&A	Requires participant reporting to gather feedback



Content Management and Time Management



Always Have a Plan B



Planning: Content Management and Time Management

Cut Content and Extend Time, Especially for 10+ Participants

If your online session is	Plan on
60 minutes long	45-50 minutes of content
90 minutes long	70-75 minutes of content

If you have	Plan on
15 minutes for in-person content	20-25 minutes for online content
5 minutes for in-person take-aways from 10 participants	10-12 minutes for online take-aways from 10 participants



Planning a Facilitated Session Online (using Zoom)

Logistics

- What Is the requested topic?
- Whose Zoom subscription will you be using?
- Will you need tech support?
- How much time do you have?
- How many participants will you have?
- What are their roles/skills/knowledge?

Instructions and Transitions

- What instructions will you provide to participants for specific activities?
- How much time will you allot for:
 - Giving and clarifying instructions? **Breaks?**
 - Transitioning between online spaces?
 - Transitioning to and from breakouts/shared screen/whiteboard?
 - Asking participants to report out?
 - Asking participants for feedback/take-aways?

Content and Format

- What content will you include/for how long?
- How much time will you spend facilitating vs presenting vs tasking?
- What powerful questions will you ask?
- Do you have an outline or cue sheet prepared for this session?

Participant Experience

- What guidelines for engagement do you expect the participants to follow?
- Are you asking the right questions - are the questions relevant for participants, right here, right now?
- What Zoom tools will you use to enhance participants' experience?
- What materials or documents do participants need before or after this session that will enhance the value of the session?



Facilitating Online Discussions for RLI

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 - Facilitator's experience vs. participants' experience
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 - Structuring questions
 - Polling, hand-raising and breakouts
- Feedback and Take-Aways
 - One Breath Feedback
- Lessons Learned: Shared Tips



Creating an Environment in Zoom

- Zoom Rooms – 3 displays
- Screen Share/Documents
- Screen Share – Whiteboard
- Breakout Rooms



Zoom Rooms: Display Options

There are 3 basic views in the Zoom Rooms:

- Gallery View – Basic setting is a grid of up to 25 participants
Settings can be adjusted for up to 49 participants
- Thumbnail View – Large view of the speaker with a scaled-down version of the gallery

Spotlight Video – Full-screen view of a speaker/controlled by host



Share Screen: Whiteboard

- The Zoom whiteboard can be helpful for brainstorming and capturing ideas.
- To access the whiteboard, Click **Share Screen**
- A pop-up window will appear with your open documents and the Whiteboard
- Click on the whiteboard icon, then click **Share** (in the bottom right)
- The whiteboard will be visible to everyone
- Click **Save** to keep a PNG image of the whiteboard
- Click **Stop Share** on your menu to return to the Zoom Rooms
- To share your screen again, click **New Share**



Share Screen: Documents

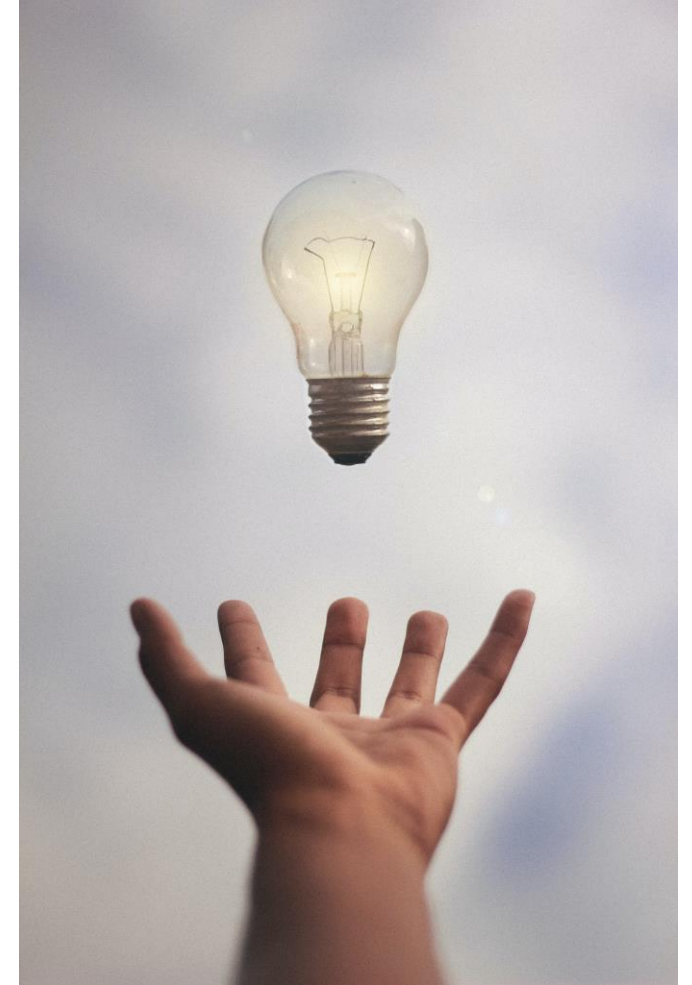
- Use **Share Screen** to present information such as documents, slide decks and spreadsheets
- Before you start your meeting, open the documents you plan to share and minimize them on your computer
- When you are ready to share, Click **Share Screen**
- A pop-up window will appear with your open documents
- Click on the document icon, then click **Share** (in the bottom right)
- Your screen will be visible to everyone
- Click **Stop Share** on your menu to return to the Zoom Rooms



Facilitating Online Discussions with District Leaders and Club Members

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 - Facilitating conversations vs. Presenting vs. Tasking
- Creating an environment for participants
 - Effectively using Zoom digital spaces and tools
 - Facilitator's experience vs. participants' experience
- **Creating Conversations: Getting Good at Asking Powerful Questions**
 - Polling, hand raising chat and breakouts
 - Structuring questions
- Feedback and Take-Aways
 - One Breath Feedback
 - Lessons Learned: Shared Tips



Polls and Hand Raising

- Polls are a quick way to engage participants and learn more about them
- Best structured as yes/no or multiple choice questions with 3-4 options
- Use the chat function for free-form questions
- Hand raising can be used as a way to engage participants and learn more about them
- Best structured as “How many of us....?” or Raise your hand if....”



Creating Conversations



Structure of Powerful (Online) Questions

- Relevant
- Specific
- Cannot be answered with Yes or No
- Begin with Why, How, What

What brought you here today?

OR

What are the top two take-aways that you expect from this session?

Why aren't clubs sponsoring new clubs?

OR

Why did three clubs in your district sponsor new clubs last year?



Creating Conversations



Structure of Powerful (Online) Questions

- Relevant
- Specific
- Cannot be answered with Yes or No
- Begin with Why, How, What

RLI In-Person Question:

Why do some people have influence and others do not?

RLI Online Question:

What is the difference between leading and influencing?



Online Facilitation: Preparation Best Practices

- Cut content - Everything takes longer online!
- Have a technical host for every session
- Have the technical host or another facilitator monitor the chat
- Set up 2 practice sessions with yourself, the technical host, and a facilitation coach/experienced online facilitator
- Rehearse any video you use in advance and have a non-video backup plan
- Use a standard slide master for all sessions in your district
- Plan your poll questions, chat questions and breakouts in advance
- Use your slides for visuals, and limit the number of slides
- Think through the questions for your session and ensure they follow the powerful questions structure
- Identify any handouts you want participants to have in advance of your session



Online Facilitation: In-Session Best Practices

- Don't answer your own questions
- Set the ground rule in advance that everyone's voice needs to be heard
- Describe the ways you want participants to engage, such as: Please answer in one breath, or Please keep your answer to 20 words, so that everyone can share
- Encourage others to use the chat to provide feedback. Ask the person monitoring the chat to read out comments that are relevant to your discussion
- Ask, then show – don't show and tell
- Keep breakouts simple: Give participants only one or two questions to discuss
Remember that slides are not visible in breakout rooms. Ask participants to write down their discussion question(s) before they transition to a breakout
- For a group of 10-12, budget 1 minute per person for individual take-aways or report outs
- For larger groups, ask 2 or 3 people to report out in one minute or less and others to use the chat



Effective Leadership Strategies



As I further my Rotary journey, I will continue to examine my own leadership style, engage in more complex and skillful use of my leadership skills and seize opportunities to lead.

Session Goals

Build on Insights into Leadership, Team Building and Club Communication in Parts I and II

Improve our ability to lead and communicate in group settings

Identify ways we can win support for our goals and proposals

Materials

◆ **Insert ELS-1:** Effective Leadership Strategies Scenarios

◆ □ **Insert ELS-2:** Building a coalition, (Page 12)
Excerpted from Leadership Development: Your Guide to Starting A Program. 250-EN

Key: ◆ attached insert ● online □ article

Session Topics

1) Exercise in seeking approval of a project by your Rotary Club. See Insert ELS-1, Effective Leadership Strategies Scenarios on page 14.

a) Develop your strategy. Where do you start?

Faculty Note: Discuss possible options in getting started, such as:

- *importance of pre-planning*
- *announcing a plan at a club meeting*
- *seeking out an influential member first*
- *talking to the club board*
- *talking with the president or key officers*

- b) How can you build a coalition for the project?
 - i) What is a coalition?
 - ii) How does coalition building work in life experiences, for example, getting support for a proposal at work, a community project, or a political issue or candidate?
- c) Practice giving a talk to the club board in support of a project.



- 2) Why do some people have “influence” and others do not?
 - a) Is “charisma” important—what is it?
 - b) How do “titles”, i.e., “Boss”, “Club President”, “Volunteer”, fit into influence?
- 3) What leadership characteristics/behaviors may impede the success of a project or other endeavor. How can you avoid use of those characteristics? Should you?

List on flip chart & discuss:

 - **Seeming elitist,**
 - **pressing ahead without full support,**
 - **seeming arrogant, failure to consult in advance,**
 - **failure to go through the usual process of the organization - such as the relevant committee,**
 - **not considering all the details of a proposal, etc. Discuss each point and how to avoid these mistakes.**
- 4) See the Scenario about a troubled Rotary club, Insert ELS-1, Scenario 2.

This scenario describes a troubled Rotary Club. Discuss what, if any, are the club’s real problems and how leadership can help solve them. Break the class up into three parts (different from previous groups) and ask each group to come up with the problems and proposed solutions. Have a representative of each group report to the whole class. Facilitators should feel free to substitute their own scenarios for this activity or build on previous discussion or issues as appropriate to the culture of their area.

Scenario 1:

Rotary Club Vice-President Marvin Montrose is proposing holding an arts and crafts show for his club of 25 members. There has not been such a show in that town in recent memory. He wants to invite crafts persons from the region to come to exhibit and sell their wares. He also wants to invite painters to do the same. He would charge the exhibitors for display tables. Maybe the club members could sell food and drinks to make more money. The site of the show would be the local park in the center of town. It is basically an empty lot with grass. ALL the members would be necessary to help out at the event. The club has never held such a large event in the town of 1500 people. Marvin says that a club committee could work out "details".

What are the issues? Develop a plan and discuss how the group came to its conclusions. Discuss how they can gain acceptance for their plan and have it implemented by the club.

Scenario 2:

The Rotary Club of Milton Crossing has a few active, involved members, but most of the members are apathetic. They come to lunch, often they leave before the program starts, and do nothing else. The membership is 33, down from 62 three years ago. The few active, involved members keep the club going, but they are getting tired of doing all the work. President Maria met with her board and the board listed several problems:

- (1) *There are cliques who always sit together at meetings and ignore everybody else. People who wish to sit with them are discouraged.*
- (2) *Some of the inactive members are big talkers, but when asked to do something, they fade away.*
- (3) *Some members have not been at a meeting for many months, but the club is afraid of losing them if they push attendance.*
- (4) *Some members announce loudly that "We don't need more members. We have a happy, friendly group now and more people will disturb that".*

Building a coalition is the act of finding a solution that satisfies everyone's needs, especially among those who have different viewpoints; it doesn't mean compromise or surrender. Leading others to a coalition results in a decision that is viable and sustainable.

Speaking points

- Define coalition, or share a story of a time you had to bring others together.
- Explain the benefits of open disagreement, which can lead to a better analysis of an issue and allow all parties to express their opinions.
- Discuss the benefits of coalition building, such as helping everyone feel a sense of ownership in the project and discovering new solutions.
- Outline the coalition-building process:
 1. List what each party wants out of the situation.
 2. Review what is critical for each person and what isn't as critical.
 3. Brainstorm new solutions.
 4. Discuss the outcomes of those solutions.
 5. Rework the solutions and other decisions to meet the critical needs.

Discussion questions

Why is coalition building important in your profession? Your Rotary club?

How do you ensure that a coalition doesn't result in compromise? How do you satisfy everyone involved?

Suggested activities

Group work: Have participants work in small groups on a case study. Assign group members different viewpoints, with one participant acting as a moderator who must build a coalition.

Individual work: Ask participants to reflect on a time when they had to participate in building a coalition. How do they think the process worked and were they satisfied with the result.

District 6040 RLI Part II: Effective Leadership Strategies

Pre-Session Question to Think About: Has your club ever experienced a service project that failed? What was the project, and why do you think it failed?

Breakout Session Simulation: Please Print and Read for June 14, 2020

All of you are members of the Community service committee of your Rotary club. A club member has set up a Zoom meeting with the manager of a local not-for-profit furniture bank, and has asked all of you to attend that meeting.

This club member has identified a project to address the needs of families in your community that are restarting their lives after traumatic experiences that may include domestic violence, eviction, foreclosure or a period of homelessness. The club member has donated furniture to the furniture bank, which transfers gently used furniture and household goods donated by individuals or corporations to families who are in need of a fresh start.

Volunteers walk families through the furniture “showroom” and families shop for the items they need. The furniture bank also picks up donations from donors, and delivers furniture to families. In addition to donating furniture, your club member served as a volunteer at the furniture bank. The club member has walked several families through their shopping experience, and is passionate about implementing a club project with the furniture bank.

Your club member wants the club to identify people and companies to donate furniture for the furniture bank, and has enthusiastically challenged the club to contribute 3,000 pieces of furniture to the bank by December 2020.

District 6040 RLI Part II: Effective Leadership Strategies

Pre-Session Question to Think About: Has your club ever experienced a service project that failed? What was the project, and why do you think it failed?

Breakout Session Simulation

On the call with the furniture bank manager, your club member explains that they have challenged the club to donate 3,000 pieces of furniture. The manager is cordial on the call, but non-committal. The club member has to leave the meeting early, but encourages the rest of you to stay on the call and talk further.

After the club member leaves the meeting, one of you asks the manager, “What do you think?” The manager is hesitant but tells you that the furniture bank has a 2-month backlog of donations due to COVID-19 and is challenged to pick up current furniture donations, and deliver selected furniture to current families, let alone address their waiting list. The manager mentions that the furniture bank partners with 6 agencies in the community to identify potential families in need of furniture. The manager admits that with COVID19 safety measures in place, the furniture bank struggles to schedule shopping visits for families in need fast enough to keep up with the supply of furniture.

Your Breakout Group Discussion

1. As your committee continues to talk to the furniture bank manager on the Zoom call, what options does your committee see for your club to move ahead with a project with the furniture bank?
2. Whom do you need to include in future discussions about a project?
 - from your club – who is the leader? Who is a first follower, and early followers?
 - from your community – who else could your club be talking to that could be part of a coalition or cooperation?

Welcome to RLI Part II

Effective Leadership Strategies



Session Objectives

- **Discuss the differences between the roles of leading and influencing in the context of a project**
- **Explore the role of coalitions in implementing club projects**
- **Apply these roles to a project simulation**



Leading and Influencing



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Lessons from How to Start a Movement

Leader

- Must have “the guts to stand out and ridiculed”
- Must make it simple to follow
- Must embrace the first followers equals



First follower (influencer)

- Transforms a project from leader(ME)-centered to WE-centered (“turns a lone nut into a leader”)
- Leads by showing everyone else how to follow (new followers follow the first follower, not the leader)
- Is the catalyst for momentum



Coalition

Alliance of partners in a community that:

- Is temporary (although it can be long-term)
- Supports a common purpose

Each partner in a coalition:

- Brings specific skills or resources project
- Has a specific role in the project

Partners may be added to or leave the coalition over time

Key question: Who/which partner leads the coalition?



Breakout Simulation and Discussion

Refer to the Pre-Session Question and Breakout Session Simulation

You have 10 minutes to discuss the questions at the bottom of the handout:

1. As your committee continues to talk to the furniture bank manager on the Zoom call, **what options does your committee see for your club to move ahead with a project with the furniture bank?**

2. **Whom do you need to include in future discussions about a project?**

From your club – Who is the leader? Who is a first follower, and early followers?

From your community – Who else could your club be talking to that could be part of a coalition?



What's Your Take-Away?



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