



TAKING THE CONVERSATION VIRTUAL

A Primer on Moderating Online Discussions

**Taking the Conversation Virtual:
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Discussions**

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About This Primer

Whether you are a seasoned facilitator looking to translate your knowledge of in-person discussions to the virtual world, or an educator getting ready to moderate your first online discussion, **“Taking the Conversation Virtual: A Primer on Moderating Online Discussions”** is intended to provide a foundation for leading and supporting your efforts.

In general, discussions provide a space for people to talk through how a particular issue or problem affects them, learn more about the issue, discover a range of views on what could be done about it, and in some cases, decide how they want to take action. When discussions are taken online, they can reach more people than face-to-face conversations, regardless of geographic distance—and they can do so faster than ever before.

Moderating an online discussion is both similar to and different from facilitating a conversation in person. For those with facilitation experience, this primer will support much of what you have already practiced as well as provide you with additional resources to draw upon. For those with little experience, it will provide you with the foundational skills you’ll need to begin successfully moderating online conversations.

Moderator vs. Facilitator

For this primer, we have chosen the word “moderator” to describe the role of the individual helping to guide an online discussion productively. We see the role of the moderator on online platforms as similar to that of the facilitator in face-to-face discussions.

If you need a more detailed guide to techniques for facilitating face-to-face discussions, please refer to the **“Facilitation Challenges and Interventions: Video-Based Training for Facilitators”** training manual and the **“Facilitation Challenges and Interventions”** training videos. These resources serve as complementary training tools and are designed to provide facilitators with opportunities to explore techniques that may be effective in challenging situations.

Public Agenda prepared these materials with support from the League for Innovation (“the League”) as part of our Faculty Voices project. However, all of these tools can be used by anyone interested in strengthening their online or face-to-face moderation skills.

This primer is broken into four main sections:

- **Introduction: What Do We Mean by Online Discussions?** provides an overview of the fundamentals of online forums.
- **Why Would You Moderate an Online Discussion?** outlines the purposes and goals for moderators.
- **Platforms and Tools for Online Discussions** walks moderators through the different platforms available for online conversations.
- **How to Moderate Online Discussions** provides guidance and ideas for moderators.

Introduction: What Do We Mean by Online Discussions?

Online discussions can be excellent formats for generating and sustaining engagement. They can provide convenient, information-rich spaces for people to connect, have meaningful conversations, make decisions and develop plans for action. However, to ensure the success of an online discussion, a thoughtful moderator is often essential. This primer is designed to help you understand the different types of forums available for online discussions, their different features, why you may choose one over another and the qualities and skills online moderators need to succeed.

While there are several types of online forums, the main distinctions between them are: “single-thread” versus “multiple-thread,” and “synchronous” versus “asynchronous.” In single-thread forums, participants focus on only one topic at a time, whereas multiple-thread platforms allow people to introduce new topics, so that more than one discussion can happen at once. In synchronous discussions, all participants are communicating at the same time and reading each other’s comments as soon as they are posted, while in asynchronous conversations, participants aren’t expected to be engaged at the same time; their discussion may play out over many days or weeks.

The following common platforms for online discussions can be categorized by these two pairs of distinctions: as either “**single-thread**,” “**multiple-thread**,” “**asynchronous**” or “**synchronous**.”

- Email listservs, Twitter, Facebook: **single-thread**, **asynchronous**
- Discussion boards and local online forums (such as Nextdoor): **multiple-thread**, **asynchronous**
- Deliberation platforms (such as Common Ground for Action): **single-thread**, **synchronous**
- TweetChat and Facebook Live: **multiple-thread**, **synchronous**

The role of the moderator, the moderation skills needed and the level of commitment required will depend on which discussion forum you select.

SINGLE-THREAD, ASYNCHRONOUS	MULTIPLE-THREAD, ASYNCHRONOUS
<ul style="list-style-type: none"> • Blog post comment sections • Newspaper comment threads & Disqus • Email listservs • Facebook conversations • Twitter conversations • EngagementHQ • MetroQuest 	<ul style="list-style-type: none"> • Reddit • Quora • Nextdoor • Blackboard Learn • Piazza • Stack Overflow • Yahoo Answers • Facebook groups • Slack
SINGLE-THREAD, SYNCHRONOUS	MULTIPLE-THREAD, SYNCHRONOUS
<ul style="list-style-type: none"> • Common Ground for Action • Dialogue • Zilino 	<ul style="list-style-type: none"> • Facebook Live • TweetChat • Live streaming comment sections

Online discussions can also be classified by other distinctions, like **“more public”** versus **“less public.”** For example, the comment section on a blog post or newspaper article is usually viewable by the public. However, a discussion forum on Common Ground for Action or a Facebook group may be open only to a discrete number of users who learn about the conversation through a particular network. Discussions can range in size and can be anonymous to some degree or completely identify participants.

Online forums blur the lines between **“thick”** and **“thin”** forms of engagement. Thick engagement is intensive, informed and deliberative. Most of the action happens in small-group discussions. Organizers assemble large and diverse numbers of people where participants are given a chance to share their experiences, are presented with a range of views or policy options and encouraged to act and change on multiple levels.

Thin engagement is faster, easier and more convenient. It includes a range of activities that allow people to express their opinions, make choices or affiliate themselves with a particular group or cause. It is less likely to build personal or community connections. One way of summarizing the difference is to say that thick engagement empowers small groups and thin engagement empowers individuals.

Online forums are often characterized as thin in general in the sense that they are relatively easy for individuals to access. However, because they convene small groups of people for discussions that can become intensive and deliberative, online forums can also be thick.

Like all types of engagement—thick or thin, online or face-to-face—it is important to think about your goals and reasons for wanting to engage people. Keep in mind that different kinds of participation can complement one another: in order to achieve your goals, you may wish to select an approach that includes a variety of ways for people to interact.

It is also important to consider that recruitment is an integral and often overlooked component of setting up a successful online forum—just as it is for all forms of engagement. Just because you have “set the table” by selecting a format and preparing a moderator, it doesn’t mean that people will actually come and sit down!

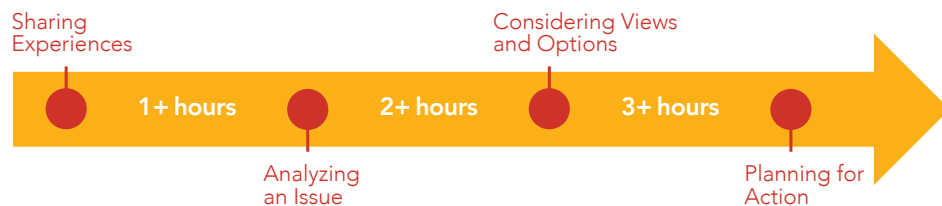
No matter what format for online discussion you choose and no matter your overall engagement approach, there is one key principle to consider: online forums work best when you treat them as “discursive” rather than “authoritative” forms of communication. That is, the best discussions support a free-flowing exchange of information in which no one person, including the moderator, has a monopoly on facts or “the truth.” You should aim to enable not just a two-way street, but a multi-way dialogue in which everyone contributes, everyone is accountable and everyone learns from everyone else.

Why Would You Moderate an Online Discussion?

You can achieve many of the same goals using an online forum that you can with an in-person forum. Both formats allow participants to connect and get to know each other, learn from one another, come to shared conclusions, plan for action and work together on implementation.

However, holding conversations online enables you to connect more people than you could in person. Online discussions also have the potential to bring together people from vastly different places. For example, through the League's Faculty Voices initiative, community college faculty across the country are organizing conversations in small groups around issues like student success. Organizing conversations online gives faculty the opportunity to have these same conversations across different campuses, thereby scaling up their impact.

Just as with a face-to-face discussion, realizing the goals in the list above requires a time commitment from participants. If they spend only a few minutes reading and contributing to the conversation, it is less likely to affect them than if they invest more time. One way to think about the tradeoff between time commitment and goals achieved is with this arrow graphic:



Whether they are communicating online or face-to-face, the more time people spend together, the more they will be able to achieve as long as their discussions are well-structured and well-moderated.



PLATFORMS AND TOOLS FOR ONLINE DISCUSSIONS

Discussion boards are common platforms for online conversation. On these platforms, participants typically have the capacity to discuss multiple topics (multiple-thread) at any time (asynchronous). Discussion boards can be used by teachers in an online or mixed-medium (both online and in-person) classroom to post questions, discuss topics and help students when they get stuck (see Blackboard or Piazza). Peers can also help one another with challenging homework assignments by asking one another questions and offering answers. Often, the moderator of these platforms is the educator.

Discussion boards can also be used to ask and answer questions or have discussions about more general topics (see Yahoo Answers, Stack Overflow, Quora, and Reddit). On these platforms, participants can post a topic and/or pose a question and a single thread will emerge with responses (both to the original post and to other responses). Depending on the platform, responses to questions can be verified, up-voted or pinned. These designations help guide users to the highest-quality crowd-sourced answers.

Local forums, such as Nextdoor, are also a kind of discussion board. Here, local community news, announcements and services are shared and discussed. Facebook groups, while not solely used for this purpose, can also serve as discussion boards for local communities, and can be used to plan events like block parties, to recommend local services like plumbers and to discuss neighborhood problems.

Local forums, as well as Q&A and topic-based discussion boards, are often self-moderated or lightly moderated. As a moderator of a discussion board of any kind, it can be helpful to set ground rules and make sure no one dominates the discussion.

An **email listserv** is a tool that allows a group of people to discuss a topic over email. This platform is single-thread, asynchronous and limited to participants who have been added or opted into the group. Participants are typically not anonymous; their identity can be linked to their email address by their name, a photo and/or an organizational affiliation. An email listserv is a good option if you are looking to have a conversation on one topic, or encouraging an orderly, slightly more formal conversation. This platform is typically moderated by an admin who approves or rejects messages before they are sent to the wider group. Someone who is moderating an email listserv should consider helping to set ground rules and leading by example when they choose to participate in the discussion themselves.

Facebook is the most widely used of the social media platforms with 68 percent of Americans using the service. The simplest way to create or join a Facebook conversation is to start a post or reply to an existing post on a conversation. **Facebook Live** allows forum organizers to broadcast a conversation in which viewers can post questions and comments and the forum organizer can respond to them in real time. Facebook Live offers several features to enable the moderation of forums and gauge the needs of participants. Although joining a conversation on Facebook is single-thread and asynchronous, Facebook Live is multi-thread and synchronous. The latter is also limited to the participants who have joined a Facebook Live video.

Although **Twitter** is not as commonly used as Facebook overall, it is frequently used for online discussions. As on Facebook, the simplest way to create or join a Twitter conversation is to start or reply to a Twitter post. To do this, you will need to post your comment or question using a shared hashtag. The Twitter platform is single-thread, asynchronous and limited to the participants who have been added or opted into the group. **TweetChat** is a Twitter chat platform that allows users to participate in real-time hashtag conversations. However, in TweetChats, the organizer needs to create a “room” for your chat, which you can then promote. TweetChats are multiple-thread, synchronous and limited to participants who use the designated hashtag.

The Kettering Foundation created the **Common Ground for Action (CGA)** platform as the online version of its traditional in-person National Issues Forums (NIF). Founded in 1981, the National Issues Forums Institute (NIFI) produces discussion guides on relevant issues facing the country. Community groups, faith-based institutions, colleges and universities use the guides to organize forums that offer the public the opportunity to join together to deliberate and make choices with others about ways to approach difficult issues and work toward creating reasoned public judgment.

On CGA, small groups can learn more about the tensions surrounding an issue, examine options for dealing with it, weigh tradeoffs and find common ground—just like at in-person National Issues Forums, but with an interactive graphic that let you actually see the shape of your conversation as it evolves. CGA forums are moderated, but participants can join from literally anywhere in the world. CGA and similar platforms are great for encouraging thick engagement among small groups who want to go deep into a topic. A moderator of this platform needs to be active, ask clarifying questions and keep the conversation on topic.



HOW TO MODERATE ONLINE DISCUSSIONS

If you've never moderated an online discussion before—or never facilitated a conversation at all—you might feel lost about where to start. A good moderator, both in person and online, is like a skillful party host: they make all their guests feel welcome, at ease and comfortable about chatting with other guests. **Here are some characteristics and responsibilities of a highly effective online moderator:**

- **Creates a friendly environment.** When engaging in a difficult or sensitive conversation, or even just interacting with strangers, participants can feel nervous. A skillful moderator sets a friendly, inviting tone as they welcome participants to the conversation, introduce themselves and encourage others to introduce themselves as well. These efforts help put participants at ease right from the start.
- **Helps set and maintain ground rules.** Before starting a discussion, a skillful moderator helps the group set ground rules for their interactions with one another (for example, “we will use respectful language” or “we will not cut one another off”). If participants set their own ground rules, they are more likely to follow them. The moderator can help the group generate these rules by proposing suggestions, keeping a running list and/or pinning them within the discussion so they can be easily revisited. If an individual egregiously or continually breaks ground rules, they may be barred from the forum (but this must be done carefully and in accordance with all rules and laws governing the forum).
- **Models good behavior.** Moderators model good behavior by listening well, asking good questions and being respectful. When this happens, participants are likely to follow suit and treat the moderator and fellow participants with the same regard.
- **Stays impartial.** Avoid the urge to jump into the conversation with your own opinion. A skillful moderator steers clear of phrases like “good point” and instead probes “say more.” This isn’t to say moderators are neutral or disengaged, but they should be passionate about the process—not necessarily the topic—and allow participants to take up the most space.
- **Creates space for participants to “own” the discussion.** Moderators help others achieve their goals more productively; they don’t control or dominate. Of course, some moments call on a moderator to intervene, but it is important to remember that intervening too often can be worse than doing too little.
- **Makes sure no one person dominates the discussion.** Moderators should be aware of who has contributed and who has not, creating an environment in which “quiet voices” and unpopular opinions can be heard and no one person (such as a strong advocate or subject matter expert) dominates the conversation.
- **Reminds participants to refocus on issues rather than personalities.** If the conversation begins to devolve into interpersonal clashes rather than the issues at hand, gently remind the group of its ground rules or refocus the conversation on the central issue. An effective moderator creates an atmosphere of acceptance of all ideas and individuals and helps give an equal hearing to all perspectives.
- **Keeps the conversation on-topic.** When comments go astray, a skillful moderator reminds participants of the goals of the session and clarifies those goals if they seem unclear. Conversations can be wide-ranging, as long as they are not off-topic. Bring participants back to the goals of the session, and “seed” the conversation as necessary, for example by posing a relevant question or posting a relevant announcement.

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- **Asks clarifying questions as needed.** As the moderator, if you are not sure what a person means, ask a question to clear it up—others are likely wondering as well! Feel free to respectfully ask for more information or restate what you think you heard to make sure you understood correctly.
 - **Guides participants towards action.** If the goal of the discussion includes taking action, a skillful moderator will help discussion participants break down the nebulous “big ideas” into tangible, time-bound, actionable steps.

Unlike face-to-face facilitators, moderators of online discussions will need a basic familiarity of the platform on which the conversation is taking place. If moderators have no prior exposure to the platform, they can participate in a tutorial with a platform representative or seek out “how-to” videos to prepare. **As you set up your online forum, Steven Clift, the founder of E-Democracy.org, recommends that moderators:**

- Welcome new participants and encourage a round of introductions.
- Encourage people to use their real names (and, if possible, configure the forum so that participants must register with their real names).
- Explain how the forum works and how participants can adjust their settings (for example, to receive posts or messages at their preferred frequency).
- Start a discussion about the purpose of the forum and the ground rules participants might want to adopt.

Some technological features you might take into consideration as an online moderator:

- Configuring the forum settings so that the first post or message from each participant must be approved by the moderator.
- Pinning messages (such as ground rules and important announcements) to the top of the forum.
- Blocking individuals from the forum for egregious and/or continual breaking of ground rules (remember that this must be done in accordance with all rules and laws governing the forum).

These are just some of the basics to keep in mind when moderating an online conversation. Starting with these building blocks will help cultivate a productive and satisfying discussion between participants. **Beyond this, a skillful moderator also recognizes when the following is occurring and nurtures it:**

- The discussion considers several different points of view.
- People are sharing what is valuable to them.
- The group recognizes that the issue is complex.
- People are considering consequences and weighing tradeoffs.
- People are struggling within themselves and with one another’s ideas.
- “I” becomes “we.”
- The discussion is civil but not simply polite. Disagreements are aired in the spirit of seeking increased understanding.

As a moderator, you should have tools in your toolbox that can be used to help create a healthy dialogue between online discussion participants. Below, drawn directly from our guide "Facilitation Challenges and Interventions: Video-Based Training for Facilitators," are six basic tactics you can use throughout the course of the discussion:

1. **Ask** another participant to contribute, encouraging orderly conversation without cutting others off. People like to type—often quickly—and in many cases you will have a group of people all contributing at once. You can encourage participants to offer their thoughts one at a time, keeping track of who would still like to share, and move down the list.

2. **Paraphrase** what a person's contribution is to clarify their point and move the conversation to a deeper level. When paraphrasing, always do so in a way that makes it easy for the original contributor to correct you.

Example: *"What I'm hearing is X. Is that right?"*

3. **Ask a "probing" or "follow-up"** question to the same participant to gain clarification or dig deeper.

Example: *"Why is that important to you?" "Can you say more about that?"*

4. **Ask a "reaction"** question that encourages others to respond to the last contributor's comments in some way.

Example: *"Does anyone else have a different view?"*

5. **Ask a new starting question.** Depending on the goals of the session, you may have a set of questions you are supposed to ask, or you may have certain issues you want to discuss, so you may just jump in to take the conversation in a different direction. Based on the responses you get, you may also develop a question that works to combine or compare opinions that were shared. A new starting question may be particularly important if the conversation has gotten off track and the participants need to be redirected to the main issue.

Example: *"Many argue that one of the key aspects of this issue is X. What are your thoughts on its importance?"*

6. **Let there be (visual) silence.** Often, moderators feel pressure to keep the conversation flowing, so they are troubled by silence (in this case, a lack of typing) and seek to fill it with probing questions or a change of topic. However, sometimes the right thing to do is to sit with the silence and give people a little space to find their way to what they want to say.

In combination and with practice, these techniques, characteristics and skills make for a highly competent and skillful moderator. With the guidance of such a moderator, an online discussion can be much more effective at achieving its intended goals.

How Online Moderation Differs from Face-to-Face Facilitation

There are several important differences between online and face-to-face discussions that pose special challenges to moderators. First, when people can't see each other's faces, they are often less mindful of how their statements might be perceived by others. They may be more likely to say rude or offensive things because they can't read others' reactions. This is even more likely in settings where people can participate anonymously by using only an avatar or a pseudonym. This is one reason to use platforms that require real names, and to encourage the group to adopt ground rules about civility and empathy.

Second, it is much more difficult to guarantee the attentiveness of participants in an online discussion. In fact, because participants are usually staring at a screen during the conversation, they are quite likely to be distracted by incoming emails, pop-up windows, and other such diversions. If the discussion is asynchronous, this doesn't matter, but for synchronous forums, the moderator may need to act proactively (asking questions of the group, calling on members who haven't stepped forward as often, etc.) in order to keep the momentum going.

Finally, a related challenge of moderating an online discussion is that it can be more difficult to "read the room," meaning you do not have people's physical cues to show you how they are feeling as they come into the room, which comments they are nodding yes to—or which make them shudder, etc. However, check-in questions can help give you some clues as to how participants are feeling and responding. **Below are some examples of questions you might ask in this pursuit:**

- *"How is everyone feeling today on a scale of one to five (one being crummy and five being wonderful)?"*
- *"Let's pause for a moment for a temperature check. Do others share the opinion that was just contributed? Do folks have strong feelings about it? Please remember the ground rules we created at the beginning of the conversation as you respond."*
- [if you have the ability to message participants directly] *"Hi, I noticed you haven't responded in a while. Is everything okay? Is there anything you'd like to contribute that you haven't had an opportunity to yet?"*

Establishing “Netiquette”

Whether you’re facilitating a face-to-face discussion or moderating one happening online, the best way to set ground rules is by asking participants to propose them (or, if you do give them a list of proposed rules, to welcome changes, subtractions and additions). Then you can revisit the rules every so often to ensure they are still working for the group. The same rules—at least, the same principles—can be valuable in both online and in-person settings.

One commonly used set of ground rules in face-to-face discussions is:

- Listen with respect.
- Each person gets a chance to talk.
- One person talks at a time: don’t cut people off.
- Speak for yourself, and not as the representative of any group.
- If you are bothered by something that was said, say so and say why.
- It’s okay to disagree, but personal attacks are not allowed.
- Help the moderator keep things on track.
- Unless the group decides otherwise, what is said in the session is to be kept confidential.

Here is a similar set of ground rules for online discussions:

- Use your real name.
- Be honest and respectful.
- “Listen” and ask questions.
- It’s okay to disagree, but do so with curiosity, not hostility.
- Keep posts/messages short.
- Be helpful to the moderator.

You can see that both lists have the same basic motivations: reinforcing behavior that is sincere, empathetic, civil, and productive.

Other resources

Navigating Two Kinds of Online Discussion

<http://blog.edx.org/navigating-two-kinds-online-discussion>

Teaching with Technology: Online Discussions

<https://www.cte.cornell.edu/teaching-ideas/teaching-with-technology/online-discussions.html>

The Ultimate Guide to Hosting A Tweet Chat

<https://www.forbes.com/sites/stevecooper/2013/09/30/the-ultimate-guide-to-hosting-a-tweet-chat/#7af0a2a431ee>

Twitter Chats 101: A Step-by-Step Guide to Hosting or Joining a Twitter Chat

<https://blog.bufferapp.com/twitter-chat-101>

A Step-by-Step Guide to Hosting a Successful Twitter Chat

<https://blog.hootsuite.com/a-step-by-step-guide-to-twitter-chats/>

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About Public Agenda

Public Agenda helps build a democracy that works for everyone. By elevating a diversity of voices, forging common ground, and improving dialogue and collaboration among leaders and communities, Public Agenda fuels progress on critical issues, including education, health care and community engagement. Founded in 1975, Public Agenda is a nonpartisan, nonprofit organization based in New York City.

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About The League for Innovation in the Community College

The League for Innovation in the Community College (League) is an international nonprofit organization with a mission to cultivate innovation in the community college environment. The League hosts conferences and institutes, develops print and digital resources, and leads projects and initiatives with almost 500 member colleges, 100 corporate partners and sponsors, and a host of other government and nonprofit agencies in a continuing effort to advance the community college field and make a positive difference for students and communities.

Information about the League and its activities is available at www.league.org.