

# E-Discussion

/ Applying collective knowledge to answer key questions /

## WHAT IS AN E-DISCUSSION?

E-Discussions are online exchanges among members of a group, in written (text) form, that are organized to reflect in depth on important questions related to ongoing projects, initiatives, or development themes. It takes place over several days or a few weeks (by contrast, an Online Jam takes place over an hour or two, with all participants present simultaneously; see 'Online Jam' in this Toolbox). E-Discussions are used to improve practice and overcome challenges in a critical development area, to prepare documentation, or to help plan for events.

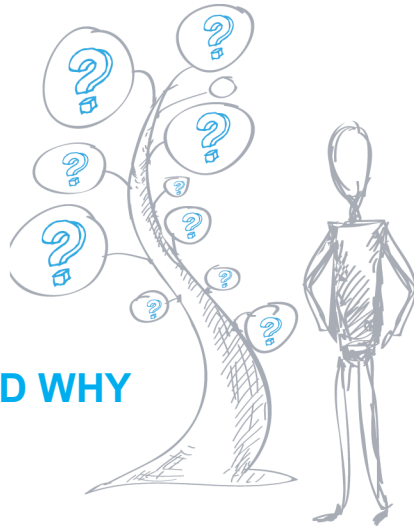
An E-Discussion occurs in a dedicated online discussion space, such as on an organization's social networking platform (e.g., Yammer). Participants go to the discussion space independently to read, contribute their answers, and respond to others by noting points of agreement or difference, sharing significant evidence, and raising relevant issues. The group's responses to the questions discussed represent a concrete output of the E-Discussion. These responses may be summarized by the facilitator, adapted for use in documentation, and applied in event planning and in relevant development contexts.

E-Discussions may be structured (organized in advance around preplanned discussion questions) or unstructured (arising spontaneously through an important question(s) asked of an online group by one of its members). Both approaches benefit from skilled facilitation.

## REQUIREMENTS:

- *Online discussion platform (e.g., Yammer,<sup>1</sup> Teamworks, Jive, IBM Connections, etc.).*
- *Participants (preferably at least 5) with computers and access to the platform. Participants should have some solid experience in the topics/issues being considered (unless the discussion is for purposes of gathering public opinions), and may even be experts.*
- *Facilitator with experience in online discussions, and some subject matter expertise.*
- *For structured E-Discussions: Advance preparation time for drafting questions, publicizing the E-Discussion and inviting participants. (Unstructured E-Discussions by definition do not have advance preparation.)*
- *Time for event: Varies, usually takes place over several days or a few weeks. Depending on the level of activity, the facilitator may need up to 1 - 2 hours/day to post questions, monitor the conversation and intervene or stimulate the discussion as needed.*

<sup>1</sup> UNICEF's social network platform is Yammer. Other platforms may be available to UNICEF staff when engaging in external discussions.



## WHEN AND WHY TO USE

E-Discussions<sup>2</sup> can be a very productive way to tap into the expertise and experience of a diverse group of individuals across multiple locations and time zones. Compared with face-to-face events, E-Discussions offer participants more time to think before responding to questions, and to express their thoughts and ideas well at a time that suits them. For these reasons, E-Discussions are well-suited for:

- ▲ Thoughtful consideration of planning, programmatic or operational issues, with inputs from a diverse audience. E-Discussions may take place at the start of the project/initiative, at points of reflection, or at the end for reporting and capturing lessons.
- ▲ Discussion of policy issues with diverse stakeholders, both national and international.
- ▲ Document collaboration: E-Discussions are useful for documents that must synthesize a variety of views on an issue requiring some reflection.
- ▲ Planning and preparing for, or following up to, a face-to-face event/ workshop.

<sup>2</sup> This document addresses only E-Discussions with adult participants, such as staff or partners. E-Discussions with youth or young people will need to consider issues of the ethics of engagement, parental consent, the balance of child rights versus opportunities, etc. Consult relevant authorities for guidance.

- ▲ Advancing the area of work covered by an existing knowledge exchange community, for example to cover a new issue or significant challenge that has arisen.
- ▲ Knowledge sharing:
  - Training/ tutoring programmes with a syllabus.
  - Participatory learning, where people can explore ideas, exchange information and share experiences on a topic or question.
  - Mentoring.

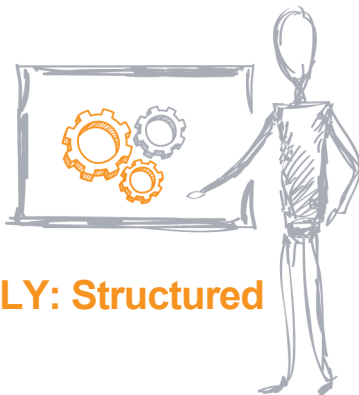
E-Discussions offer several logistical benefits: They are useful for collaboration among participants in different locations, by minimizing the costs of travel, both in time and in money. E-Discussions can be a valuable collaboration option when it is challenging to bring everyone together at a single time and place. They can enable participation by people with packed schedules, who might not be able to attend meetings/workshops<sup>3</sup> at fixed times, but who can participate online at varying times according to their own availability.

The keys to succeeding with an E-Discussion include:

- ▲ A relevant topic and thought-provoking questions that encourage participant engagement and stimulate interesting discussion threads.
- ▲ A specific ask or output that the E-Discussion is addressing (so people understand what they are working towards and why their views are being sought.)

<sup>3</sup> Note that E-Discussions are not the same as online meetings; the latter take place at a specific time, usually via meeting software such as Lync/Skype/GoToMeeting, and require simultaneous participation from all participants. See also the module on Online Jam for a hybrid E-Discussion/online meeting model.

- ▲ Choosing participants who are willing to engage in the online discussion.
- ▲ A skillful facilitator who is prepared to invest the time needed to maximize participation.
- ▲ Priming the discussion (i.e., engaging participants behind the scenes before the E-Discussion actually begins, in order to kick-start the online exchanges). See Tips for success below.
- ▲ Preparation of concise, accurate summaries of the discussions, with any additional insights that the facilitator can offer. This is required for structured E-Discussions, and is very often helpful for unstructured ones as well.



## HOW TO APPLY: Structured e-discussions

### Prepare in advance

*This guidance is for organizers of the E-Discussion.*

**1. Understand the purpose of the E-Discussion.** Review the options listed under 'When and why to use', and identify the specific objective(s) and outputs for your discussion.

**2. Identify the participants needed in order to achieve the objectives, then inform and invite them.**

- ▲ Whose views do you want to hear, and whose expertise do you want to tap into? Are they colleagues or are they from other departments or agencies? Do they see the discussion topics as relevant to them? Are they open to discussing and sharing ideas online? Do they already have an online discussion space that could be used for the E-Discussion?
- ▲ Once you know roughly who you want as participants, contact them and invite them to the upcoming E-Discussion. If there is only a limited number of potential participants, contact them directly by email. Or, if the E-Discussion addresses questions of wide interest that would benefit from a large number of participants, then cast your net wider: Promote the E-Discussion through broadcast emails, announcements (on the social network platform, or physical notices), sharing information at regular meetings, etc. to build interest. Clearly communicate "what's in it for them" – how they would benefit, or why they should put in their time. You may need to use multiple channels in order to get the attention of your intended audience.
- ▲ All of your communications – whether targeted email, broadcasts, announcements, etc. – should specify the topic of the E-Discussion, what will be done with the results (especially if the discussion is for a purpose such as providing input to a policy note or helping evaluate a programme), when and how to join, and whom to contact in case of questions.
- ▲ If you know of 1-2 participants who have particularly strong expertise in relevant issues, consider asking them privately to help get the ball rolling in the discussion, by being the first ones to respond online; see *Tips* below.

**3. Prepare an outline to guide the E-Discussion**, taking into account your participants' background and roles, and your objectives. The outline should include 2-5 major discussion questions, and (if needed) background reading/reference materials. Include also the order in which the questions will be posed to participants, how many days will be spent on each major question, and the start and end dates of the E-Discussion.

▲ Ask questions that induce reflection and challenge viewpoints. Make them concrete: Structure them around activities, tasks and specific issues. Craft them with a view to getting answers that will help achieve your objectives. See *Tips for success* below for more guidance on creating E-Discussion questions.

▲ Optional (useful for complex issues): Prepare a 2-3 page contextual background document summarizing the main themes/issues and listing key references for reading prior to or during the E-Discussion. This document can be shared with participants for further reading.

▲ Optional: Prepare short guidelines for the facilitator and participants. See Annex 1 for example content of guidelines. The guidelines consist of simple rules and practices that enable respectful and constructive discussions. (If most of your participants are very experienced in E-Discussions, the guidelines will be less important.)

**4. Designate a facilitator.** The facilitator (perhaps yourself) should be familiar with the topic being explored, with the E-Discussion format and with the platform to be used. S/he should be prepared to write summaries of the discussions quickly and accurately as the discussion proceeds. S/he should also ensure

that they have time to dedicate to this every day to ensure active participation as well as removal of spam/inappropriate comments.

▲ If appropriate, consider engaging an external facilitator(s) who has/have a very good reputation in the topic of the discussion; this can sometimes stimulate participation. External facilitators have the same role and time commitments as any other facilitators.

**5. Remind participants to sign up and complete their online profiles a few days before the discussion begins.** Encourage them to add photos and personal details, and give instructions on how to do so. Profiles with photos and relevant personal details are quite helpful for building a sense of connectedness and fostering dialogue online, especially if not all participants know each other. They also help to prevent spam or inappropriate comments.

▲ **If email alerts are available in your chosen platform, ensure they are enabled, and advise participants on how to turn them on/off.** Email alerts are important for helping participants stay on top of discussions, and respond in a timely way to questions and comments but depending upon volume, can also be intrusive.

▲ Some discussion platforms allow contributions by email; if appropriate, share the relevant details on how to do so.

### When you are ready to start

*This guidance is for facilitators.*

**6. Upload all relevant documents and reading material** (such as the outline, the contextual background document, and any important

readings) to the E-Discussion space in the platform.

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**7. On the first day of the E-Discussion, kick things off with a message in the discussion space (on the platform) welcoming all participants and briefly summarizing the purpose, duration and methods to be used.**

- ▲ If appropriate, post some brief background information on the E-Discussion participants (including facilitators and any designated experts): organizational affiliation(s), special expertise, roles, etc.
  - ▲ If you prepared discussion guidelines, share them now, either as a link or as full text in your message.
  - ▲ If participants are unfamiliar with the platform, share links to available technical guidance, how-to's or FAQs which they may find useful.
  - ▲ Let participants know how they should contact you (most likely, via email) if they have technical difficulties. Be prepared to respond quickly to any such queries.
  - ▲ Once you have posted the welcome message, **send at least one initial email to all participants, advising them that the E-Discussion has begun, and linking to your welcome message on the platform.** Do this even if email alerts are on.
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**8. Begin sharing the discussion questions with participants, according to the outline prepared earlier.** For each question, let participants know how long they will have to

discuss it. Ask for responses, or ask pre-selected participants (via private email) to respond first, then allow the discussion to proceed.

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**9. Throughout the E-Discussion, act as a guide and stimulate the discussion.** Apply your facilitation skills to foster constructive conversation, prompt people to respond and contribute, read posts regularly and respond yourself to encourage participation, ask provocative questions to get reactions, and comment or clarify as needed. See 'Facilitation tips' below. This may require up to 1 - 2 hours per day.

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**10. Write a short recap at the end of each discussion phase.** The recap (also called a 'consolidated reply') should include the main highlights of participants' responses and comments. In addition it should provide a quick analysis and refer to any examples or useful literature. Depending on the extent of the discussions, your summary recap could be anywhere from 100 to 1000 words or even more. Post the summary in the discussion space, and use it as a means to further promote the overall discussion and to attract and engage participants. Then proceed to the next question or set of questions.

- ▲ If appropriate, send also an email message with a link to the recap, to all invited participants (in case some have not yet joined the discussion).
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**11. At the conclusion of the E-Discussion, thank participants for their contributions.** The primary concrete outputs – the summary recaps of the various questions – will have already been compiled by you and are now available for sharing

and use as appropriate, according to your initial objectives. The discussion threads themselves remain online as a reference and record of the discussions.

## TIPS FOR SUCCESS



### Developing effective questions

▲ Base the questions on relevant activities, tasks or specific issues within a topic or theme that participants are familiar with. Think about what questions are relevant for your work objectives, interesting for the participants you intend to invite, and appropriately challenging for them.

Example: (Issue) ‘The government of (country X) has just passed an amendment to the constitution recognizing the right to both water and sanitation services for all. What are the key priorities to address in a realistic programme of action to realize this right? Bear in mind the current economic situation of the country, the challenges of providing services in remote and rural communities, and the issues presented by the activity of armed groups in the neighbouring (country Y). Consider the progress achieved, and the problems encountered, when (country Z, in the same region) attempted to expand provision of safe water in rural areas and improve sanitation in major urban communities; refer to the background reading attached.’

▲ If needed, request assistance of 1-2 subject matter experts in question development (likely not more, as then the discussion process might be pre-empted).

▲ For each question, explain the issue or problem clearly, and provide examples. If needed, you can share **brief** background readings to accompany questions; remember to provide time in the schedule for participants to read and reflect.

▲ Give clear directions on what is expected in the responses, i.e., the scope for discussion, type of response sought, the maximum number of words etc. Share examples to guide participants.

▲ Use open-ended questions, which are questions that cannot be answered either Yes/No or by picking from a list of answers. Open-ended questions encourage greater quality and quantity of discussion.

▲ In general, avoid closed or single-response questions. Closed questions (which are accompanied by a list of answers from which the participant must choose) and single-response questions (which can be answered by a simple ‘yes’ or ‘no’) can be limiting. Using them can shut discussions down quickly, even if the questions are accompanied by a request for participants to explain their answer. Consider posting some closed/single-response questions as polls (using the polling features of the discussion platform).

## Other planning tips

▲ Decide how many participants to invite. Small group discussions (5-15 participants) can work if the group includes the needed expertise and if the facilitator can ensure that those who have the expertise actively participate. Trust levels may be higher in small groups; this may be a key factor for discussions on sensitive topics. But large group discussions (more than 15 participants) usually work best, because they are more likely to generate better and more diverse responses. Large groups may require more questions, or more challenging questions, to keep the group engaged.

▲ **To prime the discussion, identify a few potential respondents who are experts or whom you know to have insights or experience relevant to the discussion.** Reach out to them personally before the conversation begins, alert them of the upcoming discussion and try to get a concrete commitment from them to each make initial contributions to the discussion when it begins. Consider asking for alternative or provocative views in order to stimulate interest. **Priming is almost always essential to succeed in an E-Discussion:** there tends to be a lot of initial inertia, and many persons may register but not contribute, just acting as observers.

▲ If your conversation includes external participants (i.e. any who are not from your organization), make sure that the platform you are using allows them access.

▲ Share final outputs from the discussion with all participants, including any external ones.

▲ Whomever you select as facilitator should be ready to provide some level of technical support or 'hand-holding' for participants on using the platform.

▲ If your E-Discussion is intended to help create documentation other than the standard discussion recaps (see #5 under 'When you are ready to start' above) then think about how the discussion will feed in to the desired products, so that mechanisms are in place in advance.

## Facilitation tips

▲ Your first objective is **getting participation**, in the form of responses and active discussion. Be ready to call on any participants you contacted in advance if their help is needed to activate the discussion. Recognize the value of any contributions, even small ones. After some time, start explicitly calling on people who have not yet contributed, e.g. by saying 'we're interested in everyone's views'. Try to be thought-provoking in your own contributions. Remind the group of the goals and purposes of the discussion: Provided these have been properly chosen, their relevance and importance will spur the exchange.

▲ Once the discussion is flowing, stay on top of it by checking the discussion space regularly, perhaps several times a day.

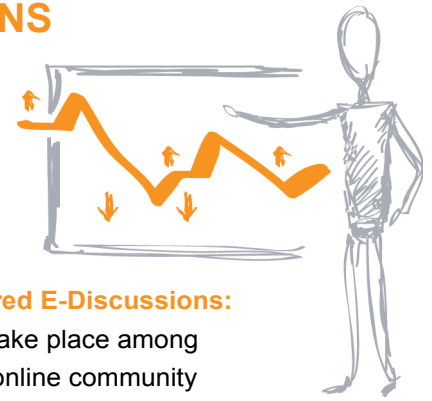
- Respond to participant posts in a timely manner. Observe, analyze and reflect on their inputs. Let them know when they are on the right track. In general, respond as a 'model participant', adhering to all of your guidelines and

supporting your discussion objectives.

- Refer people to other participants' posts; let them interact and respond to each other.
- Provide suggestions and solutions to help people who seem to be.
- If a conversation veers off topic, steer it back in the desired direction. Look out for signs of confusion, tension, or technical difficulty, and intervene supportively and helpfully to clear these up.
- Be ready to remove any inappropriate (discriminatory, completely off-topic, etc.) contributions, should these occur.
- If there are participants in time zones far removed from your own, remember that their responses may come in at varying times, so check in frequently.

Because an E-Discussion takes place online, it has some additional facilitation challenges that are not found in face-to-face meetings. It is more difficult for facilitators of online activities to gauge participants' levels of interest and engagement, because they don't have access to the physical clues (such as gaze, tone of voice, offhand comments, body language, etc.) which are available in a face-to-face setting. **When facilitating an E-Discussion, pay close attention to the frequency and tone of participant comments, in order to manage the interaction in the best way.**

## VARIATIONS



### ▲ Unstructured E-Discussions:

These typically take place among members of an online community that already exists. Unstructured E-Discussions begin when a member or a community facilitator poses a significant, relevant question to the community, more or less spontaneously. The discussion then evolves under its own momentum, often with some assistance from a facilitator.

Despite being unplanned, such discussions can offer great value. The spontaneous nature of the question can sometimes be very effective in eliciting participation from the community. The ability to hold unstructured E-Discussions is one reason for establishing and maintaining a Knowledge Exchange Community (see the article in this Toolbox).

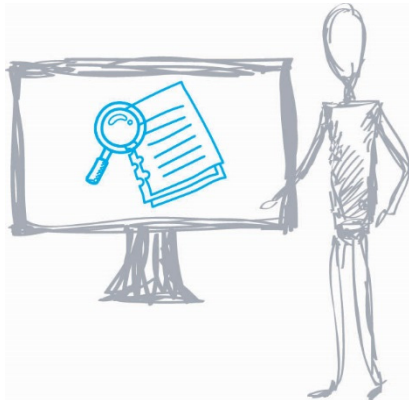
Some of the same considerations as for structured E-Discussions apply.

- The best questions are concrete, challenging, usually open-ended, and are relevant to the background and work objectives of the community members/discussion participants.
- Community facilitators can help by responding to highlight particularly important questions, referring participants to reference materials or previous discussions, keeping discussions on track, encouraging participation, and sometimes by privately prompting knowledgeable persons to respond when needed.



- If good responses are provided during an unstructured E-Discussion, a summary recap by a community facilitator can help capture the knowledge more effectively.

## CASE STUDY / EXAMPLE



A set of related publicly accessible E-Discussions took place on the **2015 ECOSOC theme: "Managing the transition from the Millennium Development Goals to the sustainable development goals: What it will take"**. To view the discussions, go to <https://www.unteamworks.org/amr2015>.



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<http://www.unicef.org/knowledge-exchange/>

## Annex: Discussion guidelines

Guidelines can be useful in preparing participants for an E-Discussion. Below are some examples of what they might cover:

### Facilitator:

- ▲ How to use the discussion forum tool.
- ▲ Role: setting the agenda, moderating the E-Discussion, fostering interaction, guiding the discussion, encouraging diverse views but keeping the focus on the topic being discussed, summarizing and capturing highlights from the discussions.

### Participants:

- ▲ How to use the discussion forum tool. This guide may be slightly different from how the facilitator would use the tool.
- ▲ How to make the best use of the E-Discussion. What are the benefits?
- ▲ Rules of engagement which define what is allowed, what is not, including etiquette for sharing views, comments and critique. E.g.
  - Be respectful when discussing other people's viewpoints. Challenge views, not people.
  - Avoid misunderstandings by clarifying issues calmly.
  - Have fun!