WEFTEC Moderator and Facilitator Training

September 9, Fiona Grant
Keeping it Flowing

WEFTEC Moderation and Facilitation
Goals for your sessions

Engaging
• Keeping event lively

Learning
• Providing easy access to expert knowledge

Connecting
•Facilitating new connections for attendees
Survey findings: Expert culture

“It is rather common to witness dismissive or demeaning attitudes toward people with differing opinions or experiences, especially during the Q&A sessions of technical presentations. This atmosphere does not encourage any meaningful discussion”

""Experts" that run conversations and disrespect others’ time”

• Professional growth is key to member satisfaction and belonging.
Survey findings: Elitism / Scale

• “I have been dismissed when expressing my opinions by specific factions who believe they are smarter, know more, etc because their education level is different.”

• You rarely highlight problems that operators experience, in language that they can understand. If you just want to talk to engineers then you are doing a great job.”

• "I do not work at a large treatment facility and sometimes, I feel my questions are looked down upon”
Survey findings: “isms” get in the way

• “Speakers could be reminded to be respectful of all WEF members and people - some older men still think it is OK to comment on women's appearance, refer to younger women as "little lady" or "girl"”

• “Comments about the rarity of women in technical fields are not appreciated. Often these comments are positive or congratulatory in nature but being singled out as "different" does not feel good.”

• “I have heard comments that I have let slide regarding women, people of color, and people who identify as LGBTQ+.”
Your role: Confident, Capable Host

- Welcoming guests and orienting speakers
- Managing run of show
- Facilitating learning
- Trouble-shooting
Logistics
On the Day
Logistics: The Basics

- Check out the room space
- Ensure speakers know where the room is
- Ask them to arrive ahead of time
Logistics: Pro Tips

- Use a clipboard
- Wear your watch on inner wrist
- Befriend AV!
Logistics: Above and beyond

Carry spare pair of reading glasses
Gearing Up

Owning your role
Bias: to have bias is to be human!

Bias is a preference in favor of, or against a person, group of people, or thing.

Explicit Bias
Biases that you are consciously aware of, and that you admit to yourself and potentially others.

Implicit Bias
These are biases that are subtly expressed. We don’t initially detect or intend implicit biases, but they can become more apparent with tools and careful self-introspection.

Own the biases you have and consider how to balance these in your facilitating style.
Powering Up

Understanding your role and session goals
- Mastering content sufficiently for role
- Considering and addressing power dynamics

Getting to know speakers
- Name pronunciation, personal pronouns, personal fact for introduction, preferences for managing audience reactions

Setting expectations for speakers
- Minimize technical jargon, help with clarity
- Sticking to time, handling questions
Warming up your speakers

Ask them for their 3 key messages, ask if they have a brief anecdote, analogy, metaphor that will illustrate each point.

Encourage a conversational tone, not a presentation – what excites them about their topic?
Language Matters – Steer clear

Women: NOT girls, gals, sweetheart, sweetie, young lady, baby
For people of color: Articulate, well-spoken, intelligent, well-educated
Anyone <40: “Young….”, Millennial

Ableist language
US centric idioms (sports)
Assuming gender pronouns
Directing the Flow

Setting the tone
Directing the Flow

Establish Command
Establish yourself in charge, welcome the speakers, get to know the AV team

Welcome Audience
First-time attendees, students, scientists, operators, non-technical

Warm Up the Room
Ask questions as people are gathering to foster connections
Speaker Introductions: The Basics

1. Check pronunciation of speaker’s names and get it right

2. Include a personal detail that’s NOT in the bio

3. Introduce their name last: please welcome...SPEAKER NAME.
Content Introductions: Pro Tip

Provide a cheat sheet with glossary, acronyms
Audience Management

- Have audience move to front if low attendance
- Z the audience: look out to back left, move gaze slowly right, then steadily zig-zag gaze to front
- Let the audience know the format and when they will get to interact/ask questions
- Watch the audience for level of engagement, ask them a quick question if they’re tuning out
Speaker Management

Long-winded speakers at a podium

- Use a pre-established signal
- Put a finger in the air, raise your eyebrows
- As they take a breath, jump in and start talking, redirect
- Move towards them in their line of sight – slowly, until they get hint
- Stand next to them and ask what final thought they’d like to make
“We’ll be moving to questions shortly: please start thinking about any questions you’d like to ask.”

“Out of respect for others, please state name, workplace and ask your question succinctly.”

Hold the mic and repeat/summarize as necessary.

Select a woman or younger person first – research has shown this will encourage a wider range of people to ask questions.

Consider inviting Qs on index cards.

No follow-on questions.
Trouble-Shooting

Long-winded questions

• If you have the mic...
• Get their attention – raise hand
• “Excuse me, can you move to your question?”
• “What is the question you would like to ask?”
Hostile statements/questions

• Speaker: Thank you. I appreciate your question/perspective – I’d like to talk to you about that afterwards
• Facilitator: Interrupt: Thanks - what is your question? Perhaps you could follow up with the speaker later.
• Find a way to acknowledge and move on
• Remember the room is with you!
Trouble-Shooting

Multiple questions

• We agreed on one question only; please follow up with the speaker later
• OR: OK if no other questions or you sense the room is also interested
Trouble-Shooting

Technical Failure

• Have a pre-prepared question to ask the audience, have them discuss with a neighbor
• If appropriate, ask the audience if anyone can help – build connections!
• Keep audience informed, let staff know
Behaviors to avoid/watch out for

- Favoritism
- Hostile or demeaning statements
- Mansplaining
- He-peating
- Unwanted physical touch
## Facilitation Practices

- **Silence** – allow for reflection, wait for other speakers, means people are thinking
  - "Love to hear from someone who hasn’t spoken yet"

- **Validation** – paraphrase and summarize

- **Mirroring emotions**

- **Balancing** – expanding to other perspectives, especially beyond first one or two people

- **Linking** – “can you help me see how this links to our topic?”
Facilitation DON’TS:
Because it’s not a competition

- Interrupt people to speak yourself
- Favor the best-known thinkers
- Give up the first time they’re stuck
- Try to facilitate, take notes AND lead discussion
- “We’ve already got that one”
- “Ooh, good one”
- “Oh you don’t really want me to write that one do you?”
- Express judgment non-verbally
## Panel Management: Set Up

<table>
<thead>
<tr>
<th>Action</th>
<th>Instructions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Arrange</td>
<td>Arrange chairs in a semi-circle if possible, so all can see each other</td>
</tr>
<tr>
<td>Sit</td>
<td>Always sit at one end</td>
</tr>
<tr>
<td>Seat</td>
<td>Seat the strongest speakers farthest away from you, and the less strong closer to you</td>
</tr>
<tr>
<td>Suggest</td>
<td>Suggest rule of ‘three before me’ to mitigate dominant speakers</td>
</tr>
<tr>
<td>Encourage</td>
<td>Encourage panelists to ask each other questions and have a dialogue if appropriate</td>
</tr>
<tr>
<td>Establish</td>
<td>Establish a signal you will use to indicate time is up</td>
</tr>
</tbody>
</table>
Panel Management: During

- Address new questions to quieter panelists
- Interrupt a dominant panelist and redirect
- Ask quiet panelists if they have anything to add before moving on
- Ask a provocative question to liven things up
- If running low on time, ask speakers to hold answers or give 5 second answers
Wrapping Up

Thank speakers, audience

Reiterate any key points you heard and suggestions for future actions/research

Direct audience to the survey for the session and encourage them to complete before leaving room