WORLD
ECONOMIC
FORUM

COMMITTED TO
IMPROVING THE STATE
OF THE WORLD

# Moderation and Facilitation

## Our goal

In today's fast changing, interconnected world, cooperation is required on all levels, in all regions and across all stakeholder groups. To understand and effectively address global, regional and industry challenges, leaders must be equipped with the best insights, the most relevant networks, a dynamic platform for collaborative action and a trusted space for leadership to develop.

The Forum's meetings provide this platform and convene its network of communities through carefully curated programmes, each specifically designed to create opportunities to learn, generate fresh perspectives, address issues of relevance and enhance collaboration.

Our meetings are not stand-alone events like conventional conferences. They are designed as part of a continuous process of interaction.

## Our expertise

With over 43 years of experience, the Forum has developed excellence in programme design and facilitation by employing innovative methods and tools at every event and combining the most relevant issues, people and interactive formats.

## Your role

The moderator and facilitator are critical to the success of any session. The responsibility of the moderator and facilitator is to ensure that the objectives and outcomes of their session are achieved, which will help contribute to a greater goal, effort or cause.

**The Forum would not be what it is today without the commitment and engagement of the moderators and facilitators of sessions at its meetings.**

## The difference between a moderator and a facilitator

### Moderator
- One that arbitrates or mediates; presides over a - meeting, forum or debate
- Steers a conversation towards a specific goal
- Competent in the field they are moderating
- Asks questions that draw out insights for the audience

### Facilitator
- One who contributes to the fulfillment of a need or furtherance of an effort or purpose
- Makes something easy by guiding participants through a collaborative process to achieve new outcomes
- Remains entirely neutral to the content

## Preparation

Our programming compass provides a useful checklist of questions for your preparation and can be discussed with your Forum counterpart when preparing for the session.

**Purpose:** What issue is being addressed? What's the objective of the session?

**Positioning:** What is the context of the session? How does it relate to other sessions? The meeting? The Forum?

**Participants:** Who is the target audience? Who else is on the panel? Who's missing from the conversation?

**Product:** What are the outputs of the session? How will the insights be captured?

**Process:** What's the format of the session? What's the ideal flow and structure of the session?

**Problem:** What may be topics or angles to avoid?

**Place:** Where will the session take place? What's the venue like? What's the environment? Set up, logistics?

**Preparation:** What inputs are needed for the session? Knowledge objects? Reports? Pre-reading? What else do I need to do to prepare for the session? And when?

# Moderation

## Formats that require moderation

**Plenary and Interactive (panel) sessions** provide strategic insight and raise global awareness on important trends and themes. There are no prepared remarks, with most of the session conducted in a Q&A format.

**Televised sessions** raise awareness of important trends and debates by broadcasting the discussion to a global audience. They are aired by the Broadcast Partner hosting the debate. There are no speeches; rather, brief remarks set the context and integrate various points of view.

**Forum Debates** are a platform for panellists (debaters) to argue for or against a motion on an issue, leading into a fast-paced, dynamic discussion among the panellists and involving the audience.

**Arena sessions** promote a dialogue among panellists by placing them in the centre of the room. The audience encircles the panel to create an intimate and stimulating atmosphere.

**BetaZone sessions** explore key innovations in today's global agenda, related insights and implications for society. The BetaZone contains a large LED screen, which provides a highly interactive setting for panellists to illustrate their breakthrough ideas to the audience.

**Cultural sessions** focus on the role of the arts to inspire out-of-the-box thinking and new perspectives on social issues, and usually include compelling visuals from artists and cultural leaders who participate as discussion leaders.

**What If? sessions** promote candid discussion of a specific, highly plausible, yet hypothetical event whereby, if such an event were to occur, leaders would be expected to respond with either a long-term plan or an immediate course of action.

**New Solutions sessions** highlight the creative approaches taken by the Forum's communities to solve certain intractable issues. Innovative solutions within the context of a global challenge are presented during the session and their impact and scalability are discussed.

**The Futures sessions** make sense of key transformations and issues on the global agenda in an interactive and informal setting, combining visual displays, expert debates and audience participation. A digital scribe will be present in the session to capture the key insights from the conversation.

## Tools and resources

**Session evaluation** is found on the Forum's mobile app, and is used to take immediate audience feedback on the session. The Forum session responsible will share the results with you after the session.
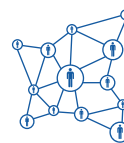
**Online discussions** can be webcast live on TopLink, allowing participants and panellists to participate in a discussion before and/or after the session.

**Animated scene setters** or video are used to set the context of a complex global issue.

**Forum blogs** are opinion pieces written before or after the session by moderators or panellists to raise awareness on the issues raised in the session.

**Digital wall** The moderator takes questions and comments from the audience and/or global viewers using a social media handle. The moderator can review and filter the social media feeds using a digital tablet provided by the Forum.

**Digital polling systems and questions** are set up in advance to gauge audience views, opinions and preferences. Global viewer polls can be taken up to 48 hours in advance of the session. The room audience polls can be taken at any point in the session, preferably at the very beginning and end of the session to gauge the change in opinions. Questions can be asked by the audience and rated to indicate popularity of the question.
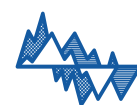
**Creative infographics** can be projected to set the context of a global issue. They can also be used to highlight a particular Forum report or general facts.

**Video conferencing** can allow a few virtual callers to join a discussion that is being webcast live.

**Props** can be used to make the topic more visually relevant.

# Moderation

## 12 tips to enhance the discussion

1. During preparation period, understand where your session fits in the overall programme theme and draw the context for the audience.
2. Keeping the audience experience in mind and include multiple rounds of Q&A throughout session. When appropriate, ask the audience to set the agenda by starting with Q&A.
3. Avoid introductions that can be easily read on the panellist's biography. Rather, weave their introduction into specific questions.
4. Encourage panellists to prepare a personal story or anecdote to make their point.
5. Explore stage set-up as a way of physically conducting the discussion in the appropriate manner, e.g. being seated in the centre, between panellists, at a podium or standing
6. Ask each panellist a "rapid-fire" question, e.g. "In one word, how you feel about 'issue X'?"
7. Use your innate sense of pacing to judge when a panellist is speaking too long. Use subtle physical cues to smoothly indicate to the panellist that it is time to move to the next point.
8. Where appropriate, assign roles (such as challenger/expert) to panellists to liven up the discussion.
9. Ask each panellist to give you at least one question they would like to ask another panellist to liven up the discussion, or ask the panellists to pose questions to one another during the panel.
10. Do not allow panellists to use a PowerPoint to explain their view unless it is a requirement of the session format, such as BetaZone or Solutions.
11. Learning is more effective if an experience is coupled with time spent thinking about what was just presented. Use the last seven minutes to summarize the outcomes of the discussion. Depending on the panel and time, invite panellists to share what they found most instructive during the discussion.
12. At the beginning of the session, introduce the session evaluation feature on the Forum mobile app for taking immediate audience feedback; at the end of the session, remind the audience to provide their feedback. The Forum session responsible will share the results with you after the session

## Moderator timeline

### 6 weeks before session
**Hold initial briefing call**
- Discuss the intended objective with your Forum contact
- Learn about the session format and explore complementary tools and resources

### 4 weeks before session
**Finalize session structure**
- Provide input on session structure and finalize speaker selection
- Explore the "12 Tips to Enhance Discussion"

### 2 weeks before session
**Brief panelists**
- Your Forum contact connects you to confirmed speakers
- Set up a briefing with speakers to discuss the flow and objectives
- Get to know the speakers' talking points and backgrounds

### 1 week before session
**Take part in moderator community call**
- Take part in the moderator community call to meet other moderators and share best practices

### 30 min before session
**On-site briefing with panelists**
- Review the session structure with the panellists in person
- Share the speaking order and any final updates

# Facilitation

## Formats that require facilitation

**WorkStudio and WorkSpace** are facilitated group discussions focusing on a compelling challenge or complex issue. The rooms are set up to allow maximum interaction among participants. They are designed with specific tasks and objectives as outlined in the session structure document and provide the highest level of interaction between participants and discussion leaders. The WorkSpace is supported by a team to enhance the experience for participants through graphic facilitation and recording.

**IdeasLab** is a highly engaging session format where ideas, innovations, trends and concepts are presented using a creative platform called pecha kucha. Facilitated group discussions among participants explore the challenges and opportunities that arise from implementing the ideas presented. The facilitator plays a critical role in the delivery of the IdeasLab – therefore, he or she must devote a significant amount of time to preparing well in advance of the event, in addition to a rehearsal on site. (link to IdeasLab widget)

**Workshop sessions** are facilitated group discussions focusing on a compelling challenge or complex issue. They are designed with specific tasks and objectives as outlined in the session structure document and provide the highest level of interaction between participants and discussion leaders.

**Solutions sessions** highlight the creative approaches taken by the Forum's communities to solve certain intractable issues. Each panellist presents a concrete solution, followed by a facilitated group discussion on its impact and scalability.

**The Challenge sessions** are an informal meeting place for participants to exchange ideas that tackle today's big challenges. These sessions provide an opportunity for solution-oriented, cross-sector dialogue. Space is limited to 14 participants plus the facilitator and the discussion leader.

## Tools and resources
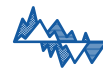
**Creative infographics** can be projected to set the context of a global issue. They can also be used to highlight a particular Forum report or general facts.

**White boards** can be used to record ideas and discussion flow.

**Icebreakers** can help people get to know each other. As a result, people can become more engaged in the proceedings and contribute in more meaningful ways.

**Brainstorming** sparks creative thinking, generates ideas and helps to quickly gather a large number of ideas. Begin by stating the issue(s) and then ask people to call out their ideas as fast as possible, without censoring themselves.

**Rovingstorm or carousel** can be used when small groups each start at a different station (a table or wall with a large sheet of paper on it) and have a short brainstorming on that station's topic. After you call the time, the groups move to the other stations and repeat the process.

**Polling** can be used to prioritize items and ideas. This method can use a show of hands, items such as sticker dots and ballots, or digital tools such as Pigeonhole, which uses mobile technology to cast individual votes.

**Small group work** can be put together by selecting groups at random (e.g. draw a card, assignment, regional basis). Each group then selects a rapporteur and assigns other roles.

**Role playing and simulations** provide an opportunity to enact a scenario, practice skills associated with the scenario and explore emotional reactions to it. If participants take on a specific role within the scenario, it is considered to be role-playing. If they are exploring a scenario without taking on a role, it is considered a simulation.

**Reporting** can be used to share the essence of small group discussions with the larger group. The reporter always uses a visual aid and sets parameters on the reporting, e.g. sharing the top salient solution of the issue discussed.

**Presentations** should be kept short and aided by visuals.

**Staying on schedule** can be achieved by setting norms at the beginning of the session. Introduce timing systems for discussion leaders at beginning.

# Facilitation

## 10 tips to enhance facilitation

1. Design a realistic agenda with buffer time built into the detailed structure.

2. Build trust by setting norms at the beginning of session.

3. Be clear on the objectives of the conversation, as well as outputs and outcomes.

4. Capture information in people's own words. Have small groups select rapporteurs who report to the larger group.

5. Understand the group and encourage inclusion of all participants.

6. Keep up the momentum and energy, and make sure people remain interested and focused.

7. Keep a close eye on the timing.

8. Summarize often.

9. Know when to take a leadership role and when to step back.

10. Enjoy watching the ideas, solutions and successful outcomes flow.
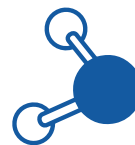
## Facilitator timeline

### 6 weeks before session
**Hold initial briefing call**
- Discuss the intended objective with your Forum contact
- Learn about the session format and explore complementary tools and resources

### 4 weeks before session
**Finalize session structure**
- Provide input on session structure and finalize speaker selection
- Schedule follow-up session design call with your Forum contact
- Explore the "10 Tips to Enhance Facilitation"

### 2 weeks before session
**Brief panelists**
- Your Forum contact connects you to confirmed speakers
- Set up a briefing with speakers to discuss the flow and objectives
- Agree with Forum contact on the materials for the session

### 1 week before session
**Take part in facilitator community call**
- Take part in the facilitator community call to meet other facilitators and share best practices

### 30 min before session
**On-site briefing with panelists**
- Review the session structure with the panellists in person
- Share the speaking order and any final updates