Online facilitation and community building

- lessons from a small e-business.

Abstract:

Burge, Laroque and Boak (2000) have noted a lack of experienced based reflections from real time facilitators at the client interface of online learning, so we're adding our 'two cents' worth. We reflect on e-learning professional development activities involving staff from small, medium enterprise (SME) and non profit educational providers in the Vocational Education and Training sector in Australia. We discuss: what we intended to happen, what happened, what didn't work and why not, what did work and lessons learned for future work. We write from a micro business perspective. We hope you can add value to, and learn from, our successes and mistakes.

Frankie Forsyth and Josephine Murray, March 2001

About the authors and their company:

Pelion is a two person micro consultancy specialising in flexible learning and development, through communication and reflection. Pelion is so named after Pelion East and Pelion West, complementary peaks in the Pelion mountain range in the highlands of Tasmania; an area renowned for the reflections in its alpine lakes and tarns. Mt. Pelion (Greece) was also the mountain that Atlas stood on to reach the heights of heaven!

Pelion is a quality endorsed and assured registered training organisation (RTO). We operate from two home offices. We are both experienced facilitators with very different styles and backgrounds. We have co-facilitated face to face and online and most of the time it works well! We are a virtual team, using online technologies to have our regular business meetings. We work associatively, partnering colleagues as specific projects require particular expertise. We are yet to own a server, so we need the Web for our business. We work to stay lean, keen and responsive!

We are:

Frankie: I'm Scottish by birth and Australian by adoption (since 1988). I have a daughter who is the love of my life and who drives me round the bend at times. I'm into Scottish country dancing, swimming, entertaining, reading, gardening and sleeping. My work passion is facilitation using action learning. While not a 'technophile', I'm fascinated by the opportunities for facilitation presented by the internet. I like getting the 'mix' of technology and face to face activities right and helping others to achieve this too!

Jo: Living and working from home allows me the flexibility to move between the personal and professional. Luckily, the challenges of e-business in a rural setting are balanced by the tranquillity of the bush garden and the sea! I like developing solutions to overcome isolation and the digital divide, through facilitating online and offline networks.

Introduction:

Burge, Laroque and Boak (2000) have noted a lack of experienced based reflections from real time facilitators, at the client interface of online learning, so we're adding our 'two cents' worth. We reflect on professional development activities involving staff from small, medium enterprise (SME) and non profit educational providers in the Vocational Education and Training sector. We discuss: what we intended to happen, what happened, what didn't happen and why not, what did work and lessons learned for future work. We write from a micro business perspective. We hope you can add value to, and learn from, our successes and mistakes. Share your experiences and reflections.

Background:

Early on, we pioneered facilitating action learning teams in workplaces, developing assessment systems and team facilitation skills. We specialised in recognition - fast tracking people with current competence to qualifications. Sometimes we were so flexible it wasn't cost effective and some clients preferred more structure and direction!

Now we provide 'just in time' training and help, what you want, when you want it, how you want it, at your pace and place, linked wherever possible, to competency standards.

We've been using WebCT on a government server since 1999 and see its long term potential to enhance client service and efficiency. We specialise in professional development and training in online facilitation and online learning design.

Our clients involvement in 'just in time' online learning may be in the context of a 'one off' activity or a longer term program involving the gradual drip feeding of an appropriate learning experience at the appropriate time and place.

For example, a client may have a query about assessment which they can voice in a bulletin board discussion in an online community of assessors and receive a broad range of responses from their colleagues as well as a response from his/her learning facilitators. Another client may be part of an international or local online learning team involved in a

work based project. The team may plan and discuss their strategies online and then put them into practice in real time - returning to the online discussion to reflect on the experience.

For people to use online learning environments, in this way, the environment needs to managed by online learning facilitators - people who:

- enhance participants' learning through engaging and motivating discussion

- cooperatively build a 'comfortable, safe' space that people feel they own and where they feel they could belong, if they so choose.

Focus:

Burge, Laroque and Boak (2000) have called for open sharing of experience based reflections from real time facilitators at the client interface of online learning. Because we found this work so refreshing and frank, we're contributing our 'early' reflections on what happened in our professional projects, (granted in a more plain English style), in the interests of professional development for online VET practitioners.

We want to share our reflections on these projects from 2000[1].

- The Online Trainer and Assessor Network

- The Collaborative Online Moderated Assessment (COMA!) project - for Registered Training Organisations

- Flexible Learning Leaders

Each of these projects required us to work online in different ways and provided us with different opportunities to reflect on the use of online technologies for learning and e-business. We'll describe what each one entailed and our key learnings.

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[1] See links in References

The Online Trainer and Assessor Network

What we intended to happen:

- We planned to offer a "'comfortable" space, especially for small, isolated, registered training organisations (RTOs), to discuss issues with others in their position. Some of our clients wanted a forum to talk about problems they were experiencing in implementing new Training Packages. We especially wanted the group to take the peaks and troughs out of assessments (against national industry developed competency standards), by comparing and discussing assessment with other providers of the same qualification.

What happened:

- We created a space in WebCT to develop an online community for assessors and trainers.

- We ran two free trials and a small number of our clients and others, who were Web literate, used it.

- After the trials the site was left open for use.

What didn't work:

There are about 200 registered assessors/trainers in Tasmania. Many of these are not yet accessing the space and no one is using it regularly. Those that did use it, discussed quality issues at arm's length. They did not use it specifically for comparing assessment. The site was not facilitated well - it was our first go!

Why not?

We can think of a number of reasons why it was not as successful as we'd hoped:

- the site was not cooperatively built

- there wasn't a shared understanding of an intended, overall purpose, let alone what we wanted to happen!

- the time frame was not clear

- the timing was ill conceived (trials ran in December and January)

- there was no professional development or demonstration given to assist people to use it (no funding and no technology support at network meetings)

- There was no hot link from the Office of Post-Compulsory Education and Training (Tasmania) site to the online network and the technology to run a data show was not able to be set up at the face to face network meetings

- we tried to do too much, too quickly in expecting people to come to grips with WebCT

- there wasn't sufficient trust/time within the group to do more than chat about the big picture

- participants don't necessarily have internet access at their work stations...there may only be one connection in their business or department, or they have to pay exorbitant prices to ISPs for access

- margins are very tight in non-profit organisations, much time goes into tendering for, administering and reporting on government funding. There's little time for looking at computers!!

- talking with colleagues about the quality of assessment isn't easy - either inside one's own organisation, or with others outside.

As well as all the above, it was also a simple question of "why will this network be worthwhile - any more than the ones I'm already in?"

What did work:

- the time limited trials allowed for focused, snappy discussion

- we learned how to build a basic WebCT space and write html pages

- we experienced facilitation in a WebCT space

- we built a good relationship with the Discover Unit in the Department of Education, whose server we were accessing on trial

- people made contact and had useful exchanges with others, who thought on the same wavelength, from different organisations

- our industry colleagues could see that we were trying to lead our industry network and supported us with positive feedback

- many of our colleagues browsed the site even though they didn't contribute.

Lesson learned for future work:

- start small and build gradually

- cooperatively design the "Rules of the Game"

- clarify the purpose and reiterate it regularly

- set time frames and boundaries around certain activities as determined by the group

- ask people to share something of themselves to build trust

- find a small concrete task for the group that will provide tangible results and which will demonstrate the power of using an online community for collaboration

- encourage more experienced online networkers to support novices through "back channelling"

- use Nancy White's Purpose Checklist to check work done

- provide professional development as members need it

- ensure coordinating agencies of the face to face network understand the opportunities for complementary networking between on line and face to face activities.

The Collaborative Online Moderated Assessment (COMA!) project

What we intended to happen:

We brought together participants from different Registered Training Organisations from the not for profit, public, private and community sectors. Our original intent was twofold - to form an action learning team and/or sub teams to develop skills and knowledge, through experience and critique, in:

1. moderation of assessment and

2. mixed mode delivery of professional development, including face to face sessions, online activities (using the WebCT platform) and multimedia (ANTA toolboxes).

What happened:

Participants were selected through expressions of interest called in March 2000, project funding was officially approved in late June and the project ran from July through to November 2000. The Department of Education gave permission for the group to use their server and access the Discover site and WebCT platform on a trial basis.

Participants engaged in a series of professional development activities:

- introductory email 'warm up' exercise undertaken and debriefed at the first session, involving guessing identities, as an intro to the fluidity of online identity

- entry survey completed (online)

- self-evaluation questionnaire re abilities in computer use adapted and completed

- one to one sessions held with each participant to set up Certificate IV Assessor and Trainer Toolbox (where necessary) and to support individual access to WebCT

- Toolbox reviewed

- participants' assessment systems drawn up and a draft moderation model completed

- units from standards chosen for small group moderation

- online and face to face (F2F) moderation activities completed, including trialing range of moderation/review tools (developed by Alex Jerrim, Thinking Works)

- tools and ideas re assessment systems and processes exchanged

- participants used Bulletin board in Web CT with confidence

- participants experienced chats, calendar function, developed 'home page' sites etc.

- good online practice explored by some and links to other sites shared

- discussion held on our understanding of 'flexible delivery'

- pros and cons of toolbox and WebCT identified

- small group and individual photos taken and loaded onto site

- online and F2F protocols developed and agreed

- most participants allocated own shell to develop online activities for clients

- some participants designed their own sites and loaded initial pages

- Discover Team demo given at second F2F meeting

- mpeg video of team loaded onto site

- some members participated in NetWorking 2000 online conference

- site was opened to NetWorking 2000 conference - over 230 hits

- input from Flexible Learning Leader (Josephine Murray) local, national, international info. to team

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- ongoing network of RTOs interested in moderation of assessments formed

- free access to WebCT through TAFE VC (Victoria) was established for those RTOs registered to deliver in Victoria, to Victorian based clients

- a representative of private, not for profit, community sector on the Board of new Centre for Excellence in Online Learning RTOs was requested.

What didn't work and why not:

Technology

- availability of the Discover administrators (our trial server) reduced significantly during the introduction of WebCT 2.1 because we were not part of their core client group and they were understaffed at a crucial time

- the set up of the newer version of WebCT reduced the autonomy of project coordinators re WebCT access: passwords, new students etc. We could no longer load in our own clients or create courses for our clients to use and we could not be both students and instructors in the same course

- we therefore lost our autonomy to co-facilitate as we no longer appeared as separate identities

- unfortunately the upgrade coincided with the participants reaching the threshold of preparedness to trial the site. Consequently their enthusiasm was dashed when the upgrade prevented them accessing the site at this critical time.

- the Certificate IV in Assessment and Training toolbox (ANTA) was not adopted, as it didn't meet the 'user friendly' test

- equitable access for non-public education providers, to WebCT in Tasmania, remains unresolved, despite ongoing requests to the Tasmanian government. We explored collaborative business models with both public and private online learning services

providers, looking for quality customer service in online learning services provision i.e. affordable access to web based learning platforms and Help Desk back up. Ascertaining definitive and affordable rates from either the DoE or private companies is still a stumbling block to providers only registered in Tasmania.

Facilitation and Funding

- the LearnScope 2000 guidelines required the development of flexible learning skills through focus on a Training Package. This forced us to provide a program which combined WebCT skills and exploring Training Package Toolboxes. This caused tension between those participants who wanted to focus on moderation of assessment (the Training Package Toolbox) and those who wanted flexible learning design and facilitation skills (WebCT)

- This dual focus impacted on the appropriateness of our chosen methodology. We did not delineate and prioritise clearly enough, the place of skills sessions within an action learning context. We chose action learning because it is best used when the solution is not known and needs to be found by the group (This fitted with cross provider moderation and organisations discussing their potential for online delivery, but not with skills session in WebCT).

- Frankie had learned WebCt by participating in a wholly online course without any face to face support (but tele coaching). We wanted to improve on this by providing a face to face group training session, followed by one on one, face to face mentoring, followed by wholly online activities. We did not allow enough time on developing purely WebCT skills, in our face to face sessions. We did not combine the two methodologies (action learning and skills sessions) well - mainly due to trying to do many conflicting things within one project.

- The synchronicity of our co facilitation was much harder to maintain in the online environment, as we were both novices at online *co*facilitation! We normally (offline) co-facilitate, but in this program we had been told that Jo couldn't facilitate, officially.

We did not clarify our understandings of how we would actually work around that. This was the first time Frankie had facilitated online and offline at the same time, so she was happy with taking the lead role. Jo thought Frankie was mainly facilitating, while she (Jo) was at arm's length in the project managing role. Frankie was thinking that she would be taking a lead role online i.e. the site maintenance, but otherwise they would co facilitate as normal. Jo's focus included providing links to information and online activities for those who were able, while Frankie was focussing on the people and where they were at. This involved managing the tensions of forming and reforming/changing subgroups and establishing people's priorities.

- when we were forced to share Frankie's online identity, our different styles came through in a way which was expected, but we were surprised at how obvious it was to us. Not having our own identities drove both of us mad!

- some participants remained uncomfortable with online activities and never 'embraced' the online 'community' *we* had built *for* them.

What did work:

- online ground rules worked because they were cooperatively developed

- trust was established between non-public providers moving into e-learning and moderation of assessment

- collaborative relationships and discussions around consortium branding, business promotion and marketting commenced

- many lessons learned from the Online Trainer and Assessor Network project were successfully implemented   in this project

- lessons learned in the Flexible Learning Leaders project were trialed in this project

- the COMA group has run a moderation skills session for the Tasmanian Assessor and Workplace Trainer network, in 2001

- our online co facilitation processes, styles were established

- participants are moving online in their own organisations

- free access to WebCT was found!

Lessons learned for future work

- Online facilitation (and co-facilitation) require similar and additional skills to face to face (F2F) facilitation

- Co facilitation online requires much more coordination and communication planning and debriefing than face to face co facilitation

- Additional time for site maintenance and extra facilitation needs to be built into an online professional development project where people are unfamiliar with the technology

- Easy and constant access by participants to sites is essential

- Acknowledgement of participants' likely resistance to learning online and provision of support for them to overcome this barrier, needs to occur

- As in F2F activities, participants vary significantly in their need to engage in banter before concentrating on the agreed tasks. This may be 'off putting' for some but 'essential' for others. Allowing a space for this to happen online, assists those who need to do it and allows those who don't, to bypass these exchanges.

- Participants need sufficient individual/group skills sessions on using features of WebCT, before starting project work. (Walk before you can run!!)

- Suit the learning methodology to the individual tasks. (Horses for courses!)

Flexible Learning Leaders

Pelion's leadership and expertise in online learning and facilitation was recognised in Jo's participation in this program. We were the only non-public provider selected in Australia. The program represented a 'once in a lifetime' opportunity to consolidate and further our expertise, so that we can continue to support and train others in online facilitation and learning design skills.

What we intended to happen:

We wanted to:

- learn about how to make online interaction more 'people centred'

- experience good online facilitation. We were sick of visiting new sites making grand claims about being interactive, which, on examination, were yet another marketting space or database, with lots of flashy, clicky bits but NO people. Perhaps its just semantics, but interaction, to us, means learning interaction between people who have formed relationships or between content, individuals and their learning facilitators

- reflect on those experiences

- build sites that meet people's needs and where people keep going because they know there'll be someone there to work/talk with.

What happened:

- Jo joined the group of 23 leaders selected around Australia and attended the Flexible Learning Leaders Forum. Her development plan focused on online facilitation and networking

- She became an online participant in a three week, Wise Circle Online Facilitation Intensive, run by Nancy White and Mihaela Moussou.

- We read Gilly Salmon's *E-Moderating* and Amy Jo *Kim's Community Building on the Web.*

- We participated in several face to face and online conferences, Online Tutor In Service - Edinburgh, World Congress 5 on Action Learning, Action Research and Process Management, Open Learning 2000, NetWorking 2000 and Spotlight on the Provider - Australia.

- We had some tutoring on QuicktimePro, the Macromedia suite and WebCT Assessment Administration

- Jo took a leadership role in presenting to the State Learnscope meeting and advocated for SME and non profit providers' access to online infrastructure to government representatives.

What didn't work and why not:

- The development of an online community of Flexible Learning Leaders was not fully facilitated and therefore didn't really emerge. Although we had a discussion board and were required to post to it, the opportunity for deeper exchange between the 23 leaders was not maximised through online facilitation. This was due in part to the technology, but also to the lack of clarity regarding the expectations of the online facilitation role to be fulfilled by the site administrators. This is being addressed in 2001, with online facilitation support provided to small groups of leaders in the initial weeks of the program and additional contact planned at NET*Working 2001.

- It was difficult to stay sane, balancing leading with personal stress levels and small business responsibilities.

- Being isolated from other FLLs - due to sub-sector and geographical location, meant that it was hard to know what other leaders were doing, so as not to waste time going over the same ground.

- The full benefit of the learning of each individual in the program has not yet filtered through into the wider VET sector. Some synthesis of these experiences has been suggested and is under development.

What did work:

- Everything else!

- Time to focus on Pelion's business direction and how Jo could learn enough to stay one step ahead of clients' needs

- A fantastic chance for us to meet and mix with other established and emerging leaders in flexible and online learning in Australia and overseas. This was especially valuable because of our size and geographic isolation

- International mentoring and networks in community building and knowledge management, lead to a wider consideration of the role of online technologies in knowledge management within organisations/communities http://www.fullcirc.com

- Experiencing top quality online facilitation, from a learners' perspective, was enlightening, motivating and very instructive.

- Being told right at the start of the 3 week Online Facilitation Intensive, that we'd get a CD ROM of everything that occurred, within the timeframe, immediately quashed anxieties about the huge opportunities for learning and the limitations on time to participate

- As the only non-public Flexible Learning Leader in Australia, advocacy re equity of access to web platforms for the non-public sector has paid off. The profile of non public providers' learning needs has been raised, as LearnScope 2001 guidelines now mention non-public providers specifically.

- Macromedia User Group networking

- WebCT assessment administration training allowed us to confidently seek work in online evaluation as well as allow us to evaluate our PD programs effectively

- sharing of the learning with other business colleagues.

Lessons learned for future work:

- To appreciate the importance of quality facilitation, become an online learner. It's much easier to identify, through one's own experiences (good and bad!), the important things to provide as a facilitator

- Shift your own 'head space' from posting on a bulletin board to participating in a discussion within a community of learners. When you go online, imagine you are present in a room with others, (some strangers, some not) and behave and facilitate accordingly. How often do you walk into a room full of people, put an idea/issue on the whiteboard, say nothing to anyone and then leave, fully expecting them to respond to you or your idea/issues?

- When facilitating online use community building strategies eg. building trust through clarifying and distilling one's own and participants' intentions from the communication

- Design and facilitate learning experiences which allow and challenge learners/members/clients to construct their own knowledge through contributing their own experiences and engaging with the content and with other community members, to critique what they are learning. Check that you've asked people what they already know and that you listened to their response!

- stay out of the discussion - how many times have you seen the facilitators' contributions dominating! No wonder people 'browse'!

- use 'back channelling' to support participation- subtle email/phone communications to deal with 'technology' and individual participation and motivation issues

- reevaluate your aims regularly (Our timeframes were unrealistic! It takes time and experience to develop and sustain online communities - like 10 years!!!).

Summary and Conclusions

From our experiences in 2000 we've learned that many of our most important lessons are in fact old adages, momentarily forgotten in the 'hurly burly' of large projects with lots of competing requirements!! Becoming a novice again oneself can be unnerving! However, for what they're worth here they are!

- Online learning experiences can be any length and depth

- Communities last as long as the people in the group require them to

- People's interests and motivations are constantly changing, so learning exchanges and communities/sites must constantly change with those moods

- Relationships are just as crucial to online collaborative activity as they are in offline activities. In a good online learning experience, the technology is only a minimal issue, the challenging and social engagement of minds and personalities around stimulating concepts and actions, motivates one. Personal connection with the facilitator and other community members, and the availability of support, both personal and technical, encourages one's involvement.

- Co-facilitation online is very challenging and lots of fun!

So how do we see online facilitation fitting into the online learning environment?

Figure 1 shows the central, but not dominating, role of the facilitator in an online environment, where the learner/member does not want to work alone. This model builds on Ron Oliver's (1999) intersecting areas of learner activity, learner support and content. It surfaces the crucial role of skillful online facilitators who carefully and deliberately build community with learners or members, through facilitating the collaborative establishment of, and agreement upon:

- the learner/member's access to the site

- opportunities and safe spaces for learners/members to practice online skills in the software and its communication facilities

- social interaction to encourage and develop the team/community identity

- the cooperative design of the learning space

- the purpose for the learner/member(s) activity

- clearly articulated ground rules/norms/agreements which govern behaviour in the online learning space or within the team/community

- the scope of the activities and requirements for assessment, if appropriate.

Figure 1: Creating community through skillful online facilitation, adapted from Oliver (1999).

Partee's (2000) view, (after Maslov), of the needs of evolving online communities, provides a framework for critiquing how well one meets these needs and allows for improvement and refocusing of online facilitation interventions and networking strategies.
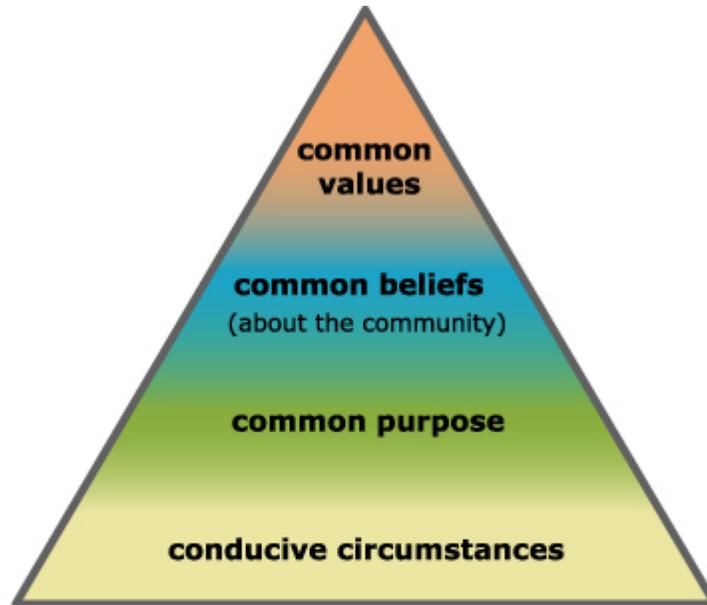
Needs of evolving online communities
Murray (2001) adapted from Partee (2000), after Maslov.

Figure 2: Evolving Online Community Needs, adapted from Partee (2000).

Recommendations:

- Quality online facilitation skills training needs to be funded and VET practitioners targetted as a priority, i.e. supports conducive circumstances

- Competencies/capabilities, whatever we call them, in online facilitation and in online content design, need to be outlined and added to the Training Package for Assessment and Workplace Training and the Information Technology Training Package. Flexibility needs to be created between them, so that customised qualifications for online

facilitators set the parameters for quality assurance in online facilitation and content development, i.e. supports conducive circumstances, common purpose and beliefs

- Equitable access to technology infrastructure e.g. WebCT, should be available to any educational provider (public or otherwise) in any state/territory under the Australian Flexible Learning Framework, to enable exploration of its potential in that organisation and decisions about investment to be made i.e. conducive circumstances.

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Partee, G. (2000), *Communities - Lands End, Napster, AIM, etc* in Online Facilitation E Group Digest No. 235.

Salmon, G. (2000), *E-Moderating: The Key to Teaching and Learning Online,* Kogan Page, London.

White, N. (2000), Online Community Builders' Purpose Checklist
http://www.fullcirc.com/

Our project site links:

Online Trainer and Assessor Network:

http://welcome:visitor@147.41.64.11:8900/SCRIPT/rtopd/scripts/serve_home.pl

Collaborative Online Moderated Assessment (COMA) Project

http://welcome:visitor@147.41.64.11:8900/SCRIPT/learnscope2/scripts/serve_home.pl

Come and join us!

Josephine Murray

Flexible Learning Leader for Tasmania

http://www.flexiblelearning.net.au/leaders/Participants/jmurray.htm