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ABSTRACT

This guide is intended for individuals and organizations interested in hosting online conferences. For the purposes of this guide, a host is the administrator or manager of a conferencing system and of the conferences held on that system. Eight sections cover the following important processes for hosting online conferences: (1) determining objectives; (2) assessing the computer system, including the host system and user systems; (3) selecting conferencing software, including sources of information, features to consider, and end-user features; (4) establishing conference site features and design, including conference registration and security, welcome messages, presenting important information/instructions, and resources; (5) planning conferences, including a literature review, formulating a preliminary plan, contracting moderators, partnering, guest presenters, and planning a conference series; (6) promoting conferences, including identifying and targeting the audience, channels of communication, content of promotional materials, timing of promotion, and response; (7) managing administration and support issues, including establishing the roles of the administrator and moderator, deleting/editing/moving messages, summaries, supporting the moderator, and supporting participants; and (8) determining post-conference considerations, including conference evaluation, feedback, useful statistics, qualitative analysis, and archiving conference proceedings. (AEF)

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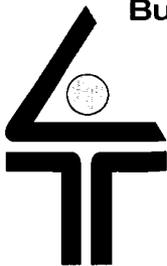
# So, You Want to Host an Online Conference ...

prepared for the Office of Learning  
Technologies by Cathy Boak and  
Jean Blackburn, NODE Learning  
Technologies Network

November 1998

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Jean Blackburn, NODE Learning  
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The opinions expressed in this guide are those of the consultants, and are not necessarily those of the Office of Learning Technologies or Human Resources Development Canada.

This guide is intended for individuals and organizations interested in hosting online conferences. What does it mean to be a host? The term can be used in several ways; for the purposes of this guide, a host is the administrator or manager of a conferencing system, and of the conferences held on that system. This guide will take you through the most important processes for hosting online conferences. In brief, these are:

- determining your objectives,
- assessing your computer system,
- selecting conferencing software,
- establishing conference site features and design,
- planning conferences,
- promoting conferences,
- managing administration and support issues, and
- determining post-conference considerations.

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## I. OBJECTIVES

If you're thinking of becoming an online conference host, a good way to begin is by sorting out what you want to achieve: what is the purpose of your conference, and what do you want to accomplish through conferencing? As well, consider the characteristics of the people who will be participating in your conference. Is your audience international, national or regional? Do your participants share specialized knowledge, or do they bring a variety of skills and expertise to the conference?

Perhaps you want to enable a select group of geographically dispersed people to collaborate on a project or report. You may want to hold a professional development seminar led by a subject expert. Or, your main objective may be to provide an open forum where anyone can drop in and discuss a specified topic, as a means of facilitating online community, promoting your services or furthering your mandate.

Online conferencing can be used to meet each of these objectives; that said, certain conferencing systems are more likely to achieve some of these objectives better than others. Clarifying your objectives, goals and user needs will help you decide which online conferencing software package is best for you. For instance, for collaborative work by a small group of specialists, you'll need a software designed for closed, password-protected conferences. For an expert-led seminar, you may want to give the session leader special administrative privileges that other participants don't have; in this case, your software must let you assign different rights to different user groups. If your goal is to attract people to your site, or to fulfill a mandated function, you may want a software package that is capable of logging statistics and displaying reports on how many people register, and how often they visit the site.

By articulating a clear set of objectives and determining the characteristics of your target audience, you'll establish a framework of goals and needs that will guide you through the entire process of hosting your online conference.

## II. SYSTEM CONSIDERATIONS

The next step is to assess whether your computer system can run online conferences. Here, you need to consider the requirements of online conferencing software packages in relation to your system, and in relation to the systems of potential participants. Your system administrator (the person responsible for maintaining the server) needs to understand your objectives, and the estimated size and characteristics of your target audience. The administrator is a key participant in the process of selecting a conferencing package.

### *Host system*

#### **Hardware specifications**

You need to make sure that the machine that will be used to house your conferencing system – the “server” – is fast enough, and has enough memory, to operate the software and to perform well. You’ll need to check the CPU (Central Processing Unit) type and speed, RAM (Random Access Memory), and other hardware requirements outlined by the software developers. Developers will usually provide “minimum requirements,” as well as “recommended requirements.” Don’t rely on the minimum requirements – often, they’re inadequate to ensure good performance. If you’re not sure, download and install demo versions (if available) and test them. Find out what sorts of hardware configurations others are using, and ask their opinion on performance. Talk to your system administrator, who can help you determine how well the server can run a particular conferencing system.

#### **Internet connection**

The server should have a direct connection to the Internet. This connection should be up and running seven days a week, 24 hours a day. Generally speaking, the faster the connection and the higher the bandwidth the better. Although your users will be affected by the speed and capacity of their own Internet connections, a dependable and efficient connection at the host’s end will help minimize system sluggishness and delays.

#### **Operating system**

An operating system is a software platform on which other software applications run. The server’s operating system will likely be Windows NT (NT Server for networks or NT Workstation for stand-alone workstations),

UNIX (of which there are many different varieties), Windows 95 or Macintosh. Different operating systems don't all support the same software packages, so it's essential to determine early on which conferencing packages will work with the operating system running on the server. Ask your system administrator.

### **Web server software (Web servers)**

Web server software enables a computer to deliver World Wide Web pages. Most Web-based conferencing packages are compatible with standard HTTP-compliant Web servers. That said, many developers will indicate which Web servers work best with their software packages; make sure the Web server can accommodate the conferencing system you're interested in.

### **Web browsers**

If your conferencing system is administered on the Web, you'll want to know what capabilities your browser must have in order to run the software. For example, you may need a Java-enabled browser.

### **Other software**

Some packages require additional software. For example, to run Allaire Forums, you'll need Cold Fusion, a Web application development program. Additional software may add functionality, such as database management capabilities; however, your costs could go up considerably. Check the developer's Web site for information on additional software specifications.

### ***User systems***

Consider the conferencing system from the users' point of view. What are the minimum CPU, RAM, hard disk space and modem speeds they'll need to participate in your conference without experiencing a lot of frustrating delays? Find out what browser specifications your audience will need to meet, and consider your conferencing software choices accordingly. Again, ask yourself about your user population. What are their needs? Ideally, conferencing packages should work with any browser, including text-based browsers like Lynx – especially since users who use adaptive technologies such as screen readers may need to use text-only browsers. Check conferencing software packages for “backwards-compatibility:” Will they run with new and older versions of browsers?

### III. SOFTWARE SELECTION

Next, you'll need to select the conferencing software most likely to meet your objectives and the system considerations we've outlined. The discussion of software selection is divided into two main sections:

- sources of information, and
- features to consider.

#### *Sources of Information*

Gathering the information you'll need to choose from among the vast array of available technologies can be time-consuming, but it's time well spent. The process can be broken down into two main components:

- identifying available tools, and
- finding out more about those tools.

#### **Identifying the tools: How do you find out what software programs are available?**

A search of the World Wide Web can yield a lot of information about available tools, but can be a daunting task. Accessing databases of computer literature – available at your academic or public library, such as the IAC (Information Access Corporation) Computer Database – can also help you identify available tools. Either way, you'll need to know the terminology associated with online conferencing. It's not always consistent: online conferencing may be referred to as Web-based conferencing, Web conferencing or computer conferencing; what's more, qualifiers such as "text-based" and "asynchronous" can be very useful in narrowing your search. Compilation sites, which filter, organize and annotate information, make the process of identifying tools quicker and easier. Have a look at David Woolley's "Computer Conferencing on the Web" (<http://thinkofit.com/Webconf>); it lists different technologies, with brief comments about each. There is also the NODE's technologies for learning: online conferencing information (<http://node.on.ca/tfl/conference/>).

### Finding out more about the tools

There are three primary kinds of information to help you make decisions about online conferencing tools:

- developer-authored information,
- independent analysis, and
- the experience of colleagues.

**Developer-authored information.** Once you've identified a number of possible technologies, the Web sites of software developers can be key sources of information about these tools. For instance, many offer information about features, pricing structures, system requirements and local distributors, and many also provide online software manuals, online demonstrations and downloadable trial versions of their products. Developer-authored information, however, is biased by nature. You'll need to balance the information with independent, critical perspectives.

**Independent analysis.** Critical software reviews and comparisons offer information which is essential to the selection process. There are many reliable sources – for example, computer magazines like *PC Week*, *PC Magazine* and *Byte* – on the Internet. A good review or comparison will provide a detailed analysis of a package's capabilities and limitations, and will often relate these capabilities and limitations to real-world applications – so you'll know whether the promises and claims of software producers actually hold true. It's a good idea to check the writer's credentials: for instance, Matt Kramer, who has authored many reviews of online conferencing packages, is a Senior Analyst at *PC Week*. Check the currency of the reviews, as well: technologies change constantly, and it's important that the information reflect new developments.

**The experience of colleagues.** Other practitioners can provide insights you won't find anywhere else. They're an excellent source of information on how the tools work. Check collections of papers and interviews such as the NODE's "Notes from the Field" (<http://node.on.ca/tfl/conference/>). Electronic mailing lists such as WWWDEV (World Wide Web Courseware Development – for more information, see <http://www.unb.ca/web/wwwdev/index.html>) are another excellent source.

## ***Features to consider***

Some elements of online conferencing packages which you may wish to consider and compare during the selection process are listed below. The criteria are divided into two sections:

- system management and administration features, and
- end-user features.

### **System management and administration features**

**Administration methods.** In selecting online conferencing software, it's important to consider how it's installed, configured and managed. Many programs feature "wizards" that make installation a quick and simple process; others require knowledge of UNIX file structures and commands. Does the software support Web-based administration, so you can set up and run online conferences on a Web browser? If not, does it require knowledge of UNIX commands or a programming language such as Perl? Which is best for you? The trend in Web-based conferencing software is to offer administration capabilities via a Web interface, because it requires less knowledge of programming languages and allows you to administer conferences from any computer equipped with a Web browser and an Internet connection.

**Information storage and retrieval.** Many conferencing systems are driven by relational databases that store information about conferences and conference participants in a series of tables, and that support Structured Query Language (SQL) – a standard language for requesting information from a database. Relational database storage and SQL retrieval let you manipulate information in a variety of ways: for example, you can generate a list of participants across a number of different conferences, sorted alphabetically. You can include e-mail addresses with this list, or link the names to registration records for easy reference. These features are built into many conferencing packages. Other conferencing packages store information in a series of files. Each user's file is unique and runs only when the user requests it: that is, the conference Web pages will be recreated on the fly each time a user logs in.

**Security options.** Does the software support password registration of users? Can you create open, closed or read-only conferences? Can you assign administrative privileges to moderators? What are your options for authentication and verification – are password protection and "cookies,"

encryption, and e-mail-back verification available? Some packages use cookies to “remember” users; others require users to log in every time they enter the conferencing system. Authentication and verification features are important tools for restricting access to closed conferences and keeping track of participants in open ones. However, these features may affect how “user-friendly” participants find your online conferencing system, so it’s useful to determine what security options are included in a conferencing package. To ensure your user registration process is as seamless as possible, you may want to see whether or not the design of the registration process – including forms and error messages – is customizable.

**Administration tools.** Consider options for designing, setting up and running online conferences, such as creating and managing user groups, granting access to conferences, and creating new conferences. (Note that differences in terminology occur between conferencing software packages: for example, a “conference” in one may be an “interface” or a “board” in others.) Note as well the options provided for delineating, granting and restricting user privileges – screening, monitoring, editing and deleting messages posted to conferences, for example. You will probably want to provide moderators with privileges not available to general users; you may also want to examine if and how a conferencing package supports the logging and reporting of access statistics, which can be very useful for later reference.

**Reliability.** Because online conferences are often time-sensitive and used by people with varying levels of technical savvy, conferencing software should be as reliable as possible. You’ll want a reasonable assurance that your conferencing system is stable, that it won’t crash while a conference is underway. Reviews, testing the software yourself, and conferring with colleagues who are familiar with the software are good ways to assess a package’s reliability. The stability of the company producing the software is also a consideration. Has it been in business long? Is it likely to be in business tomorrow? How often does the company issue upgrades? If your software developer goes out of business, you may be stuck with an obsolete package.

**Ease of use.** While you’ll face a learning curve regardless of the software package you choose, some are easier to learn and use than others. Ease of use is commonly described in terms of whether or not a software program is “intuitive.” This generally means that buttons, command bars and menus have logical and meaningful labels, that the interface is clearly constructed and easy to navigate, and that help files are complete and well organized.

**Ability to customize.** You may want to modify the conference display to include particular features or graphics. The extent to which you can control the interface differs between conferencing software packages. Can you choose between a frames-based conference site and one without frames? Can you change the graphics, colours, fonts and site layout? The degree of control over the design of a conference may be an important consideration in evaluating a package.

**Automatic e-mail notification.** This is a useful feature. Some systems send automatic welcome messages to registrants, a feature that can be particularly helpful in building a sense of community and trust during an online conference. The ability to send e-mail messages to all registered users at once is another advantageous feature – you might use this feature to notify conference participants of an unexpected maintenance shut-down.

**Documentation and support.** Check the quality and completeness of the print or online manuals, guides, instructions, help files and tutorials that accompany a software package. How comprehensive, detailed and readable are they? As well, investigate the support options (or lack thereof) offered by the vendor. Is there a telephone help line and, if so, when is it open and how much does it cost? Is e-mail support available? Is there a local vendor or company representative?

### ***End-user Features***

**Message Display.** Message display is often discussed in the literature and by users of conferencing systems as being either “threaded” or “non-threaded.” Threaded messages are displayed in a hierarchical “tree” format; replies to a message are grouped under that message and indented. Non-threaded messages are displayed in a chronological list with no indentations. These terms may be confusing. Although a hierarchical message display may be referred to as “threaded,” the term can also mean that messages are organized by subject in divisions within a conference. Terms used to describe these divisions vary depending on the conferencing package: for example, they may be called “threads,” “items,” “topics” or other names. Within each division, messages and replies may be displayed hierarchically or as a chronological list, depending on which format a particular package supports.

The ways in which a conferencing system groups and/or displays new messages is another important feature. Some systems “remember” what a participant has read during previous visits and offer the option of displaying only messages that have not been seen.

**Message composition and editing.** What are the characteristics of the message composition and editing interface? Is it easy or difficult to edit text? Can the user insert HTML codes within messages? Does it provide automatic recognition of URLs and e-mail addresses included in messages? Is a spell checker included? Does the package allow users to attach files to posted messages? Can multimedia files such as sound and graphics be embedded in messages and, if so, how easily?

**Online help.** Check the quality and completeness of the online help files. Can users find the help they need? Are the language and style easy to understand? Is the layout clear and easy to read? Can you add to or edit the online help?

**Navigation and search features.** Ease of navigation is one of the most important features of an online conferencing package. How easy is it for users to find their way around a conference site? Are groups of messages and individual messages logically organized and clearly demarcated? Do hyperlinks to messages and categories of messages take users to the right places? Are there clear subject or topic headings so users can readily keep track of where they are in relation to the rest of the conference?

An internal search engine can be an effective aid to navigation, as long as it works well and is straightforward to use. Does the package feature an internal search engine and, if so, what search options does it provide? Can users search only the full text of postings, or can they limit searches by topic, author or subject line? Are search results displayed clearly, and do they contain direct links to the retrieved item?

**E-mail notification and response.** Another feature worth considering is e-mail notification; users are notified automatically of new messages posted to a conference. Some packages include the entire message with the notification; others inform recipients that a new message has been posted, and may provide a hyperlink to the message or topical group of messages to which it belongs. Another feature which users may find helpful is the ability to respond to a posting via e-mail, without having to access the conference over the Web.

Choosing an appropriate software package is an important responsibility for the online conference host. Information from developers, independent critics and colleagues can help you narrow the choices; that said, they don't replace the need to examine and evaluate potential conferencing packages yourself.

Once you've decided on software, it's time to turn to issues such as site design, conference planning, promotion, and administration and support.

#### **IV. CONFERENCE SITE FEATURES AND DESIGN**

The design and layout of your conference site can have a considerable impact on conference participants and, ultimately, on its success. The aim in designing a conference site is to make it as clear as possible to users where they should go, what they should do, and how they should do it. Registration procedures, welcoming messages, instructions, technical tips, and the availability and accessibility of topical information resources are all important aspects of your conference interface.

##### ***Conference registration, password protection and "cookies"***

With some software packages, all participants must register; with others, registration is optional. There are good reasons for building a registration process into the design of your conference. First, if participants are required to pay registration fees, or if the conference is private, you'll need a mechanism to let certain users in and keep others out. Even if your conference is public and free of charge, registration lets you keep track of how many people have joined the conference, who they are, and where they're coming from.

In public conferences, the number of people who actually post messages is likely to be much smaller than the total number who register and read only, or "lurk." Most people are "lurkers:" while they may visit the conference site often and benefit from reading the discussions, they won't post messages. That's why looking at just the number of people who posted messages won't necessarily tell you how many people you've attracted. Requiring users to register for your conference, on the other hand, will provide you with a more reliable attendance report.

Registration has its down side – it can confuse users. People may assume that, because they're being asked to fill out a registration form, they'll be required to pay a fee. Others may get stuck in the process of registering, and give up before they get into the conference. Again, no matter how clear you think you've made the registration process, it won't be intuitive to everyone. If you decide that the advantages of user registration outweigh the disadvantages, keep two key points in mind in designing them: clarity and ease of use.

Online registration forms should feature clear instructions on the form, and always give users a way out – in the form of a “cancel” button, or a link to other help files or another type of form. Consider creating two forms: a User Registration Form for first-time registrants, which requires the user's name, e-mail address, username and password; and a User Login Form for those who have already registered and are re-entering the conference, which requires only a username and password. Each form can be linked to the other, with instructions on which to use when. The User Login form might also provide a mail-to link for users who have forgotten their usernames and passwords: they can send an e-mail to system's technical support staff.

Consider letting conference participants select their own usernames and passwords. The conference administrator will save time, and users will be able to choose words they're more likely to remember. That said, this can be confusing for people who are used to being assigned usernames and passwords. When faced with a request for a username and password, some may think they've missed a step in the registration process. Try to anticipate registration difficulties, and incorporate online help on a Web page featuring clear answers to frequently asked questions, and a step-by-step guide linked from every step in the registration process.

Some conferencing software packages allow the use of “cookies” to increase the user-friendliness of the registration process. A cookie – a message containing user registration information – is stored in the participant's Web browser. When participants register for a conference, the information they enter into the registration form is stored in the cookie. Later, when they visit the conference, the browser sends the cookie to the site's Web server. The Web server can then “serve up” Web pages based on this information. That way, users don't have to type in their username and password every time they access the conference site – as long as they're using the same computer and browser. Suppose Samuel McGee registers for a forum. The next time he visits the site, he'll see this message: “Are you Samuel McGee?”

If he clicks “Yes,” he’ll be taken directly into the conference. If he clicks “No,” he’ll get a User Login or User Registration form. Or, he might get a conference Web page with a personalized message such as “Welcome, Samuel McGee!” Some users find cookies invasive; that’s why some packages offer the option of working with cookies enabled, and without.

### ***Welcome messages***

Users should see the welcome message(s) as soon as they enter the conference for the first time. There are at least two kinds of messages. First, conference host or administrator welcome messages provide basic tips on using the conference system and posting messages, information about available resources and direct links to those resources, who to contact for support and how. Administrator welcome messages may reiterate basic information about the conference, such as topic, scope, timeframe and moderator. This information helps orient users, lets them know how to get help, and makes them feel welcome. Consider posting messages in a thread or item called “Read this first!” or “Before you start ...,” to ensure users enter conference discussions with the basic information they need. Users sometimes post questions in the administrator welcome thread, so it’s a good idea to monitor it regularly. Second, moderators post welcome messages introducing themselves and providing initial direction for the discussion. These welcome messages often encourage participants to post messages introducing themselves, and summarizing their interest in and expectations for the conference.

### ***Presenting important information, instructions and tips***

There are key instructions or tips that need to be communicated to all participants. You can:

- 1) Create a new thread specifically for this purpose, with a meaningful title such as “Help with the conferencing system.” Make sure the title can’t be misinterpreted as another subject thread for the conference.
- 2) Include important tips on the main conference page, where they’re most likely to be seen. For example, if there is a delay in registering a message, users may click the “Enter Message” or “Post” button several times. As a result, the same message will be displayed several times. In this case, explaining the delay on the main page, along with a caution not to hit the “Post” button more than once, might prove useful.

Consider providing key instructions and tips in more than one place, as well. The same message can be posted in your welcome message, in a special thread dedicated to technical support, and directly on the conference Web pages.

### **Resources**

The significance of resources will vary depending on the objectives, topic and structure of your conference. Clearly, if the purpose is to create or modify a document such as a draft policy or report, copies of the document, minutes of committee proceedings, related policies and research results will be crucial. Even in an open conference, where the discussion is relatively unstructured and the purpose is to brainstorm or provide an online venue for people to gather and discuss a subject, resources can play an important role.

One, a good list of resources may attract people who would not otherwise join in. Two, resources may stimulate ideas and discussion. Three, participants who are unfamiliar with the subject under discussion will be able to come up to speed rapidly. Four, your selection of resources can help direct the discussion: for instance, if your purpose is to explore new aspects of a particular subject, provide resources that relate to new or emerging ideas in the field.

Whatever the role of resources in your conference, here are some key considerations:

- Careful selection is more important than volume: a few resources that have been evaluated for relevance, authority, currency and scope are often more helpful than a lot of resources which have not been “filtered.”
- Annotate each entry so that participants can evaluate its relevance before linking to it: annotations should clearly, concisely and accurately reflect the contents.
- Make resources easily accessible.

If your resources are online, participants can access them through a hyperlink. When essential resources are not online, consider providing participants with print copies. (For more on this topic, see the “Circulating Information in Advance” section of Lyndsay Green’s paper, *Online Conferencing: Lessons Learned*, prepared for the Office of Learning Technologies (OLT) and available on the OLT Web site (<http://olt-bta.hrhc-drhc.gc.ca/online/index.html>). In

open conferences which don't depend as heavily on resources, provide an annotated list (in the form of a Web page) of online papers, articles and examples relating to your topic (with direct links to the documents). Print resources should be included if key research in a given subject area is only available in print; however, participants are less likely to read the material if it's print-based and they're required to locate it.

Take every opportunity to let participants know that resources are available. Consider placing an icon labelled "Resources" near the welcome message. Or create a thread that contains the list of resources and links as a posting, or that includes a message describing the resources and linking directly to the list. Again, it's helpful to give this thread a meaningful title such as "Resources for [the subject of your conference]" or "Online Papers Relating to [the subject of your conference]." You'll probably want to note the resources and link to them in your welcome message; you may even wish to remind participants about the resources right on the conference main page. Finally, consider including a sentence or two about the conference resources in your promotional materials.

## V. PLANNING

### *Literature Review*

A literature review helps a conference host to:

- set specific objectives by selecting key issues,
- identify key players to be invited,
- write effective promotional materials, and
- establish a list of resources to support participants.

When your main objective is to examine various perspectives on a topic, to define and discuss emerging issues, or to contribute to new knowledge on a topic, it helps to conduct a literature review; however, its importance will vary depending on the type of conference you're hosting. Reviews may be current or retrospective, or both, depending on your topic, what you want to accomplish and the nature of your audience.

Some conferences rely on an established knowledge base that is well-known to you and to participants. Your objectives may include an end-product such as a decision (or decisions), a policy document or a strategic plan. Or, you may want to provide opportunities for your participants to seek and/or offer consultation and advice. In these cases, a literature review – though less of a priority – may be beneficial in planning your conference.

### ***Formulating a preliminary plan***

Planning a conference is an evolutionary process. The vision that emerges from early discussions is likely to change a great deal. The nature of your topic, the characteristics of your audience, and the available resources will shape your plan. Meeting with members of your organization and other interested parties for a brainstorming session can be a very effective way in outlining an initial framework and structure. Here are some points to address:

#### **Conference objectives**

What do you want to learn or produce? Define an evaluation framework? Draft an agreement? Produce a collaborative research paper? Your objectives will influence how you plan, design and promote your conference.

#### **Conference scope**

What aspects of your topic do you want to discuss? What tasks do you want to accomplish? What groups do you wish to serve? At this stage, it helps to define and clarify issues and terms associated with your topic and audience.

#### **Conference structure**

Will the conference be open (public) or closed (private)? If it's closed, how many participants do you want to invite? Will you structure the conference around a predetermined agenda, or will its structure evolve? Do you want participants to start their own discussion threads? Will the conference be unilingual, bilingual or multilingual? How long will the conference run? For more on this topic, see Lyndsay Green's *Online Conferencing: Lessons Learned*, pp. 12-18 (<http://olt-bta.hrdc-drhc.gc.ca/online/index.html>).

### **Roles and responsibilities**

Who will be responsible for the various tasks associated with hosting an online conference: administration and monitoring, technical services and support, promotion and site design? Many of these roles overlap; one person may well take on more than one role.

### **Potential moderators**

Who would be a good moderator? Do you want a single moderator or a team of moderators, each with different skill sets and areas of expertise? It's a good idea to identify alternates, in case your first choice(s) cannot commit.

### **Possible timeframes**

When do you want to hold the conference? Consider audience characteristics and availability, other events that may complement or conflict with yours, the availability of moderator(s), and the time you'll need to produce promotional materials.

Early discussions should result in an outline of conference objectives, an understanding of the scope of your conference (including what it will and will not cover), a general timeframe, a list of potential moderators, and a delineation of conference roles and responsibilities.

### ***Contracting moderators***

Engaging someone to moderate your conference is the next important step. Important criteria are subject expertise and/or expertise in moderating.

Both parties should agree on the responsibilities of the moderator(s) and the host(s). Include some or all of the following in a statement of the moderator's responsibilities:

- regular monitoring;
- welcoming participants;
- facilitating the development of discussion threads;
- responding to participants' questions, interests, ideas and concerns (by providing information, introducing related issues, and referring to posted resources and other messages);

- organizing the flow of the conference;
- encouraging participants to use appropriate threads; and
- summarizing the discussions on a periodic basis or in a final report.

Include some or all of the following in a statement of the host's responsibilities:

- supporting initial contacts with potential participants,
- locating resources, and
- summarizing the discussion.

For more on moderator and host rights and responsibilities, see *The Well's Host Manual* at <http://www.well.com/user/confteam/hostmanual/section1.html> (Please note that The Well refers to conference moderators as "hosts;" in this guide, hosts organize and administer online conferences, while moderators facilitate and manage discussions.)

### ***Partnering***

When planning a conference in collaboration with partners, you'll need to consider the following.

- It will take time to reach a consensus. Plan accordingly. And remember that while the discussion and debate arising from the merging of different ideas, experiences and points of view may slow the process, in most cases that process, and the conference itself, will be greatly enhanced as a result.
- When collaborating at a distance, ideas tend to develop independently among collaborators. All the more important, then, to keep the lines of communication open. Conference calls may save time in reaching a consensus and making decisions.
- It's important to establish roles and responsibilities early on in the planning process. Since much of the work is done independently, and pooled and coordinated from time to time in group meetings, you'll need to delineate tasks and responsibilities in order to avoid duplicating work and/or missing an important task entirely.

### ***Guest presenters***

Inviting guest “speakers” raises its own set of issues, including timing, contributing to conference objectives, and maintaining “online community” dynamics. Lyndsay Green explores some of these issues in the “Use of Experts” section of her paper, *Playing Croquet With Flamingos: A Guide to Moderating Online Conferences*, prepared for the Office of Learning Technologies (OLT) and available on the OLT Web site (<http://olt-bta.hrdc-drhc.gc.ca/online/index.html>). Often, the conference moderator(s) will arrange guest presentations, in which case conference hosts should be fully apprised of who the guests are and the nature of their presentations.

### ***Planning a conference series***

Planning to host a series of related conferences rather than a single event? Then it’s a good idea to draft an outline of the series before you start planning the first conference. With an outline, you’ll find it easier to guide the flow of events and topics. Just remember to keep it flexible – what you plan today will probably look quite different in the end! – but it will delineate what you want to accomplish. The outline can be an important tool in planning each conference: it will let you see how each fits into the broader context. For examples of conference series, see the NODE’s Networking series at <http://node.on.ca/forums/> and the technologies for learning series at <http://node.on.ca/forums>

## **VI. PROMOTION**

Hosts of public, or open, conferences must tackle the issue of promotion. (Private conferences target a limited, known group of participants.)

### ***Identifying and targeting your audience***

You’ve thought about your audience in general terms – defining their needs and expectations. Now, think of your audience in terms of individuals and groups who might be interested in participating, and how best to tell them about it. For instance, if you’re hosting a conference on educational technologies, consider informing not only educators but also companies interested in technologically mediated training. Conversely, you may decide to limit your promotional efforts to certain groups: for example, it may be best to focus on post-secondary educators.

### *Channels of communication*

Once you've established who you want to promote your conference to, consider how they receive and use information. Since you're hosting an *online* conference, potential participants probably access and use electronic information resources regularly. Indeed, online promotion makes the most sense, in most cases. That said, don't necessarily discount the print medium. For instance, consider distributing flyers to delegates at a face-to-face conference. If you have the time and the resources, advertising in print journals and newsletters may be effective to reach certain audiences. For example, humanities scholars may still rely on print publications, since their work doesn't depend on up-to-the-minute data.

Nevertheless, online media are probably the most effective in promoting online conferences. These media include electronic mail, electronic discussion lists, newsgroups and newsletters, conferences, and World Wide Web pages. Sending out individual e-mail messages can be an extraordinarily effective promotional tool, especially when each message is personalized. E-mail can also be used to invite key participants: people whose recognized expertise in the subject area can stimulate discussion and attract other participants. How do you identify these key people? Through a literature review, by monitoring electronic discussion lists, or simply by word of mouth.

Though effective, personalized e-mail messages are time-consuming; what's more, they're not practical when targeting wide audiences. Posting to electronic discussion lists is a much easier and more efficient method for this purpose, particularly since – unlike newsgroups – list messages are delivered directly to subscribers' e-mail in-boxes. As a rule, a designated administrator “owns” or moderates the list and its discussions. Subject-specific lists (there are lists for almost any topic) are ideal for promoting online conferences; as well, announcement lists such as Net-Happenings are useful if you want to appeal to the general Internet community. Newsgroups, which are categorized by topic, are another excellent location for promotional messages. Again, there's a newsgroup for almost any topic (and for infinite derivations thereof!). Other online conferences, or forums, may also be appropriate venues for posting announcements of your conference.

There are several Web tools you can use to find relevant discussion lists, newsgroups and forums. Reference.Com (<http://www.reference.com/>) is a searchable archive and directory service. L-Soft International ([http://www.lsoft.com/lists/LIST\\_Q.html](http://www.lsoft.com/lists/LIST_Q.html)) is a directory of mailing lists that

use LISTSERV software; lists based on other software packages like Majordomo are not included. Reference.Com and L-Soft International provide e-mail addresses of list owners, and L-Soft notes the subscribership of the list, as well. A site called Liszt (<http://www.liszt.com>) – “the mailing list directory” – lets you search by key word or browse by subject, and contains newsgroup and IRC chat directories, as well. You can locate newsgroups through Dejanews (<http://www.dejanews.com/>) or through the MetaCrawler search engine (<http://www.metacrawler.com>) by selecting “newsgroups” from the drop-down menu provided. Forum One (<http://www.ForumOne.com/>) is a searchable database of ongoing Web forums.

You should only post appropriate promotional materials – that is to say, of interest to users – to discussion lists, newsgroups and forums; otherwise, you will alienate readers. Not sure? Don’t post it. If you’re not familiar with a list or group, send your posting to the moderator first and let the moderator decide whether or not it’s appropriate.

### ***Content of promotional materials***

Keep it short! Think of your announcements as a press release: concentrate on the “who, what, when, where, and why” information. Use language and terminology familiar to your audience. In the body of your message, provide a direct link to the conference site or, if it’s not up, to a Web page containing more detailed information. Include translations of your announcements when posting to bi- or multi-lingual discussion lists, newsgroups and forums.

### ***Timing of promotion***

Timing can be tricky. If you send out a major promotion too far in advance, you run the risk that people will have forgotten by the time your conference is set to start. We get so much information via online media that it’s impossible to retain even a small part of it for any length of time. That said, with too little notice, potential participants won’t have time to plan for the conference. What’s optimum, then? If your conference starts on a Monday, consider sending most of your online promotional announcements on the preceding Wednesday or Thursday. You may want to send another batch of announcements as your conference nears the half-way point; let people know what’s being discussed, and urge them to join in. Again, keep it short and provide a direct link to your conference site.

## ***Response***

Expect to receive inquiries. No matter how clear your message, there is sure to be confusion over some point or another. Answer inquiries promptly: they can be effective in encouraging interest and establishing some online community dynamics before the conference starts.

## **VII. ADMINISTRATION AND SUPPORT**

### ***Establishing the roles of the administrator and the moderator***

With most conferencing software packages that feature extra capabilities for administrators and moderators, there is some overlap. For instance, both the administrator and the moderator of an online conference will probably be able to move, copy and delete messages. Before your conference gets under way, it's important to clarify whether one or both parties will be responsible for these tasks. They can share the tasks, as long as there is clear communication and agreement between the two parties. That said, your moderator may want to retain full control over the structure and content of the conference. Alternatively, you, as the administrator and host, may want a say in the organization and management of the conference.

### ***Deleting, editing and moving messages***

Deleting messages may be necessary for several reasons: if there are inappropriate or nuisance postings; if participants inadvertently post the same message more than once; or if participants ask that one or more of their messages be deleted. Editing messages is a more complicated issue, because it touches on censorship and freedom of expression. Regardless of who is responsible for deleting and editing messages, it's advisable for the host or administrating organization to formulate and publish a policy. With such a policy in place, disagreements between participants and moderators or administrators will be resolved more easily.

Moving messages can be helpful in organizing and structuring discussions within a conference. For example, if a conference features several discussion threads dealing with similar issues, it may make sense to combine them into one. Or, if a message posted in one thread is relevant to the discussion

in another, this message may be copied and posted in the second thread, as well. Again, it's important to clarify who will be responsible for moving messages, and to clearly state a policy outlining the rights of moderators and/or administrators to take such actions. In addition to the policy statement, you may find that informing participants of any deletions, editing or moving of their messages will help maintain a sense of trust, and reduce the confusion when a participant can't find a message that's been moved or deleted, or a thread the title of which has been changed.

For more on rights and responsibilities, check the site of "The Well" (<http://www.well.com>), a large online conferencing facility based in California. You'll find it in their Host Manual at (<http://www.well.com/user/confteam/hostmanual/section1.html>) The Well allocates these responsibilities to the moderator(s); other conference hosts may define roles differently. (Please note that The Well refers to conference moderators as "hosts," whereas here they organize and administer online conferences, rather than moderate them.)

### **Summaries**

Lyndsay Green discusses the role of summaries – digests of key points of discussion in an online conference – in her paper *Playing Croquet with Flamingos: A Guide to Moderating Online Conferences* (<http://olt-bta.hrdc-drhc.gc.ca/online/index.html>) Providing summaries may be the administrator's responsibility, or the moderator(s). Either way, they can be very effective tools: to highlight interesting ideas, examples and directions in the discussions; in compiling reports and articles once the forum has ended; to bring participants up to date, particularly when they didn't have time to keep up with messages, or came in mid-way through the proceedings.

### **Supporting the moderator**

Providing periodic summaries of discussions is a form of support for moderators. If moderators aren't familiar with your conferencing system, setting up a test conference site where they can practice creating threads and posting messages is another way to provide support. Moderators may also require specific types of support as the conference progresses (e.g., a participant survey, concept mapping design, etc.). Moderators may also need help to respond to questions or issues raised at the conference.

### ***Supporting participants***

Most requests for help are made during the first two days of a conference: e-mail messages asking for help with registration, their usernames and passwords from past forums, and cost; queries about the capabilities of the conferencing software. You'll also get some telephone inquiries. Consider a direct help line, keeping in mind that it will need to be staffed during specified and extended periods of time. Most participants' needs can be met via e-mail.

Communicating technical information by e-mail requires a clear, detailed, step-by-step approach. Imagine demonstrating a feature of the conferencing system face-to-face, then describing the process in an e-mail message. Try to answer e-mail requests as quickly as possible. Participants appreciate prompt responses; in fact, quick responses written in a friendly, sympathetic style not only alleviate participants' frustration, they also make them feel valued. In this way, technical support can play an important role in establishing trust and a sense of belonging.

You can learn a lot through your own experience in hosting online conferences. Look for ways to improve your hosting skills in the next section.

## **VIII. POST-CONFERENCE CONSIDERATIONS**

### ***Conference evaluation***

You can invite participants to evaluate your conference, using tools such as online surveys and feedback forms. Or, conduct evaluations from the host's point of view. How conferences are evaluated will largely depend on conference objectives. For instance, if yours is a public conference designed to provide an open forum for anyone interested in a particular topic, you'll probably be interested in how many people registered and visited the site, and in evaluations of the promotion and registration methods used. When running a closed conference, you'll already know the number of registrants, and may be more interested in evaluations of the quality and outcomes of the conference discussions.

## ***Feedback***

Even if you don't plan to evaluate your conference, feedback can be very useful and can provide you with users' perspectives on not only the pros and cons of the conferencing software used, but also on the design of the conference and the quality of the discussions. User feedback can be a very valuable indicator of the extent to which your conference objectives have been met. As well, providing conference participants with an opportunity to give feedback gives them another way of getting involved. During the last few days of your conference, consider creating a "feedback" thread; post a message asking participants to share their comments and opinions about the conference, and provide a link to a feedback form. On the form, provide space for comments and suggestions. When the feedback form has been completed and submitted, it can be forwarded to conference administrators and moderators automatically. Feedback can be very helpful in planning and designing future conferences.

## ***Useful statistics***

Compiling summary statistics of conference activities can be useful in analyzing and evaluating conferences. Here are some examples:

- total number of postings;
- total number of moderator postings, and the proportion of these to the total number of postings;
- total number of participant postings, and the proportion of these to the total number of postings;
- total number of registered participants (during the active period of the conference, and at other intervals after it has closed);
- number of participants, broken down by category (country of origin, language, occupation) if known, and the number of postings for each category (introductory messages from participants can be very helpful in determining these characteristics);
- number of postings in different languages, and bi- or multilingual postings (if applicable);
- number of active participants (how you define active may vary depending on your conference objectives and characteristics);

- proportion of active participants;
- proportion of inactive participants or “lurkers” (those who register but do not post messages);
- proportion of moderator to participant postings;
- total number of threads;
- number of threads created by the moderator, and the proportion of these to the total number of threads;
- number of threads created by participants, and the proportion of these to the total number of threads;
- number of postings by thread;
- number of postings by topic: these numbers are distinct from the number of postings by thread, since a topic may be discussed in more than one thread. Statistics on postings by topic can be very valuable in pinpointing “hot” or troublesome issues within a subject area;
- total overall visits to the conference site;
- number of visits to the conference site per day; and
- conference site visits per capita: total overall visits divided by total number of registered participants.

These statistics can help you determine how many people you attracted to the conference site, how interesting the conference topic was to participants, who seemed more likely to post messages, and the relative activity of moderators to participants.

### ***Qualitative analysis***

Other methods of conference evaluation focus on the texts of conferences rather than their numbers. You can evaluate a conference by inferring the type of knowledge gained by participants from the content of the discussions, and whether participants achieved a higher breadth or depth of knowledge on a particular topic. Or, you can base your evaluation on tangible products: for example, if the purpose is to draft a policy document, the evaluation may focus on the quality of the document produced, and the pros and cons of conferencing for collaborative writing and reaching consensus.

### *Archiving conference proceedings*

Archived conferences can be valuable resources for months, even years, after the conference has ended. Even though maintaining archives takes up memory on your server, consider the advantages.

With the appropriate tools and careful planning, online conferencing can be a rewarding experience – for hosts and participants. I hope this guide will help you start off on the right foot.



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