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ABSTRACT

This guide summarizes lessons learned from the author's experience of organizing and moderating five non-pedagogical online conferences that use World Wide Web-based conferencing software, whether synchronous or asynchronous. Seven sections cover the following topics: (1) the pros and cons of online conferencing; (2) setting objectives; (3) understanding the target audience, including access to the conference and characteristics of the participants; (4) understanding the conferencing facility, including a comparison of asynchronous/synchronous conferencing facilities; (5) designing the conference, including decisions about asynchronous versus synchronous, open versus closed, length, size, setting the agenda, using experts, clarifying expectations, circulating information in advance, confidentiality, and unilingual versus bilingual; (6) organizing the site, including the welcome message, background documentation, introduction of participants, and help features; and (7) running the conference, including the role of the moderator, technical support, encouraging participation, summaries, and closure. An appendix lists resources. (AEF)

Online Conferencing: Lessons Learned

by Lyndsay Green

May 28, 1998

Office of Learning Technologies
Bureau des technologies d'apprentissage

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About this Guide

During 1997, I helped organize and moderated five online conferences, three of them sponsored by the Office of Learning Technologies. Having learned a great deal about the benefits and the pitfalls of online conferencing, I decided there would be some value in pulling my findings together and sharing them with others. This guide summarizes lessons learned. I hope you'll learn from my mistakes and benefit from my successes. I've also prepared a companion guide that focuses on the role of the moderator, *Playing Croquet with Flamingos: A Guide to Moderating Online Conferences.* Armed with these resources, I hope that you'll feel fully equipped to enter the exciting world of online conferencing.

First, let's clarify the terminology. This guide is about conferences that use Web-based conferencing software, whether synchronous (often called "chat") or asynchronous. (See Understanding Your Conferencing Facility, on page 8.) The use of Web-based software allows anyone with access to the Internet and a Web browser to go to the conferencing Web site and access the conference. (A list-server, also used for conferencing, sends e-mail messages directly to conference participants, who receive them as incoming mail.)

This guide focuses on non-pedagogical conferences, that is to say online gatherings which are not part of a formal course or instructional package. There are important differences between online classrooms and online meetings, not the least of which is the difference in motivation of the participants. (See Understanding Your Target Audience, on page 5.)

What Is Online Conferencing?

The best way to approach online conferencing is to recognize it for what it is — a brand new communication medium. Our tendency is to do the opposite — to overlay it with the structures we know. That said, when people consider the use of online conferencing, they're usually selecting this medium over a face-to-face meeting. For that reason, let me begin by comparing the pros and cons of online conferencing using face-to-face meetings as a point of comparison. By understanding the medium's strengths and weaknesses, you'll be better able to push online conferencing to its limits, while at the same time, setting realistic expectations.

The five online conferences I moderated used groupwork to achieve a variety of objectives. (See First, the Objectives, on page 4.) In each case, the goals could have been met either face-to-face or online, with slightly differing results. Here's what I found:

The Pros of Online Conferencing

Save on travel costs: Online conferencing can be a cost-effective way to bring together a group of geographically dispersed people.

Maximize participation: Some participants may not be able to travel, or devote adequate time to a face-to-face meeting. There is a greater likelihood they can find time to sign onto an online conference. In addition, people who are travelling may be able to access the conference while in transit.

Meet deadlines: Because it's easier to get the participants together, the chances of achieving the meeting's objectives in a given timeframe are better.

Bring in other resources: It's easy to source and circulate new material to participants by "hot-linking" to other sites or posting new material on the site. Experts can also be included online. In addition, I found that participants often shared the proceedings with other colleagues who proved to be valuable resources themselves.

The transcript: The transcript allows people to come in and out of the conference, and still catch up with the proceedings. In face-to-face meetings, people check in and out (either mentally or physically!), but are unable to recapture what has transpired in their absence. Text-based communication also allows you to scroll quickly through comments that aren't of interest. As one participant said, "Not being forced to listen to everyone's comments as you do in face-to-face meetings was of value." In addition, the transcript can prove to be a valuable resource for follow-up use, and certainly makes writing up conference reports easier.

Lack of hierarchy: Since participants are disembodied (i.e., they have no physical presence), they are freed from some of the stereotypes that can hinder communication. They are more likely to assess others on what they say rather than on their age, race or physical condition. Ideas have a greater chance of standing or falling on their own merit. This can be especially beneficial in cases where hierarchy has jeopardized a solid exchange of ideas unless they're put forward by those in authority.

Two additional benefits relate more to asynchronous than synchronous systems. (See Understanding Your Conferencing Facility, on page 8.)

Time for reflection: Asynchronous systems give participants the time to review previous messages, check references and take any amount of time to compose a message. Many people like the act of writing down their thoughts (e.g., "Writing made me clarify.") There's less time to do this with a synchronous system.

Freedom from time zones: Because asynchronous systems allow 24-hour access, people can participate in local time.

Cons of Online Conferencing

Restriction of text-based communication: Online, communication is restricted to the written word. Tony Di Petta reminds us that communicating in such an environment, without the visual or auditory cues that form 70 per cent of face-to-face communication, does not come naturally to most people. [1] In addition, some may have difficulty with their level of written literacy.

Moderating challenges: Moderating online conferences is challenging because you can't rely on the non-verbal cues used so extensively in face-to-face gatherings — both to assess the group dynamics and to express yourself clearly. The moderator needs to spend a good deal of time carefully crafting messages so as not to be misinterpreted, and checking in with participants to make sure they're in sync with the group.

Challenges with group synergy: Online, it can be hard to establish and maintain group synergy, with people coming on- and offline at random. In four of the five conferences I moderated, people were brought together for one time only; most didn't know each other beforehand. In general, participants found it more difficult to socialize or form a connection with other participants than in a face-to-face forum. Knowing this, you can try to address it when you design your conference. (See Designing the Conference, on page 12.) You might also explore the use of photographs, or audio and video clips, to focus on participants. In addition, online conferencing can be used in conjunction with other media (e.g., video and audio teleconferencing and face-to-face meetings), especially if your objective is to sustain the participants as a group.

Lack of a captive audience: Ironically, the greatest benefit of online conferencing — flexibility of access — becomes a liability if you're trying to get people to move to a more profound analysis of a topic. In face-to-face meetings, you can always "lock" people in a room to get them to focus on an issue. Online conferencing allows people to take a coffee break whenever the going gets tough. In a couple of cases, I might have pushed a given topic to a more profound level of input in a face-to-face forum.

Simultaneous translation: All five conferences were bilingual. (See Designing the Conference, on page 12.) The big advantage of a face-to-face forum is the possibility for simultaneous translation, which isn't currently feasible online.

First, the Objectives

Before examining more closely the different online conferencing options, start by setting objectives. All of your decisions should flow from this starting point. Online conferencing can be used to meet a wide spectrum of goals. Here are some of the objectives outlined for the five conferences I moderated:

- gathering input from experts for the preparation of a document on social access to learning technologies;
- expanding knowledge on workplace learning centres by bringing experts together and sharing collective knowledge;
- receiving input on federal government discussion papers on student assistance reform in preparation for a face-to-face meeting (one of the goals was to maximize the effectiveness of the subsequent face-to-face meeting);
- increasing participants' awareness of "Outcome Assessment in Learning" and providing them with access to experts in the field.

As well:

- In most cases, the medium was used as a vehicle for distributing background or discussion papers.
- In all cases, the goal was to facilitate an exchange of views among participants, which was seen as more valuable than individual contributions.

- In all cases, one of the objectives was to explore the use of the medium itself, and to familiarize participants with the technology.
- All the conferences offered participants the opportunity to extend their network of contacts in the field.

Understanding Your Target Audience

Once you've determined your objectives, you'll need to identify your target audience. First, let's look at ways of determining whether your audience will have access to the online conference. Then, we'll look at some characteristics of the audience that will influence the outcome of the conference.

Access to the Conference

In our first online conference, we developed a checklist of measures to evaluate whether a learner had genuine or "social access" to learning technologies. I've adapted this checklist here.[2] To access the online conference, participants need:

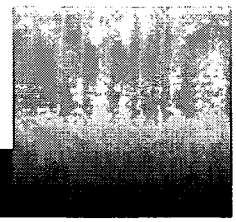
- adequate physical proximity to the tools: Participants need access to a computer equipped with Internet access and a Web browser. Is the computer accessible from work, from home, while they're travelling?
- to perceive the tools as being accessible: The site must be "user-friendly."
- awareness of the availability of the tools: Because the conference is Web-based, people have to remember it's there and go to it. There are no reminders. As a result, barriers need to be low and motivation has to be particularly strong.
- technology with adequate technical capacity to do the job: During the five conferences I moderated, participants experienced a range of technical frustrations that may have stemmed from any number of causes — slow computers, slow modems, overworked servers, institutional firewalls. That said, the technical requirements for Web-based online conferencing are generally relatively low.
- sufficient skills to handle the technology and the tasks (computer skills, literacy): Those who participated exhibited a wide variation in competency with computers and computer conferencing. No attempts were made to assess an individual's skill level ahead of time; instead,

they benefited from technical support, a help line and my support as moderator. With a few exceptions, most were skilled enough to participate.

- the self-perception that they have the skills (confidence): In most of my conferences, at least one person was responsible for contacting people who weren't participating to determine whether lack of confidence was the problem, and to provide encouragement. We weren't always successful, especially in cases where people had competing commitments and did not want to spend the time they felt it would take to acquire a comfort level with the technology.
- tools available in their language of choice: All of the conferences were bilingual (i.e., the user chose whether to see the interface in English or French; all documents and major postings were in both languages; moderation and technical support were available in both languages; and participants were encouraged to communicate in the language of their choice). Despite this, only one of the five conferences was truly bilingual. (See Designing the Conference, on page 12.)
- affordable cost (the user needs to find "real value" in the process — i.e., the cost in time, money, etc., is worth the price): In general, the participants'employers paid for Internet access while they were at work, but not if they accessed the system from home. In addition, some of the participants were self-employed and bore the full expense. In addition, when considering the high time requirements of the online conference, lost-opportunity costs made the exercise relatively expensive for some.
- tools designed to meet their physical needs: Those who participated in the four asynchronous conferences could do so when they chose, regardless of their geographic location. The text-based nature of the conference requires a lot of reading on a small screen (although it's possible to increase the size of the text in some facilities), and typing on a keyboard. I found that spending weeks online took a toll on my hands, shoulders and neck.

Characteristics of the Participants

Two important elements of group composition will affect the online conference: perceptions of fellow participants, and motivation.



Perceptions of Fellow Participants

In a closed conference where you're in a position to select participants, make sure you consider not just their individual characteristics but how they'll work as part of a group, and how this might affect your ability to fulfill your objectives. The way people perceive their online community has an obvious effect on the nature of their participation. In the closed conferences featuring the participation of experts, people were interacting with colleagues. They were talking to potential employers, competitors and peers in a context where they assumed their input was being assessed. This motivates participants to generate high-quality information of a superficial nature (e.g., tips on hardware and software). It's a much tougher environment in which to openly question and explore the validity of their own or someone else's approach to a particular problem. Make sure that your expectations mesh with the group's potential.

How well the group works together is also predicated on their previous history. I moderated one conference where participants had been dealing with one another for years, often across the negotiating table. As a result, there was some concern that the conference would turn out to be a confrontation rather than a dialogue. The conference mitigated this possibility. As the conference progressed, a very collaborative environment was created. (See Running the Conference, on page 21.)

Motivation

As part of your conference planning, you need to consider what is motivating your participants and, wherever possible, build in incentives to increase the level of motivation. In my view, participants' motivation brings the most weight to bear on the outcome of an online conference. Highly motivated individuals will virtually guarantee success.

In the closed forums I moderated, the motivation was high for a combination of the following reasons:

- High need for the information: Those who participated the most were those who had the greatest need for the information, and those who could actively apply it to their work.
- Sense of responsibility: In the closed forums, people had agreed in advance to participate and clearly felt a need to fulfill their commitment. Those who were participating in a professional capacity needed to make sure they represented the interests of their organizations. In the closed

forums, people also seemed to feel a sense of responsibility to their fellow participants. The more they were online, the more they seemed to feel this group responsibility.

- The "O.K. I'll get to it" syndrome: In two of the forums, we were actively encouraging people to participate; several people came online in response to our repeated calls and e-mails.

Understanding Your Conferencing Facility

Now that you've established your objectives, and have identified and analyzed your audience, let's look at your online conferencing options. Conferencing softwares vary; they're used to create different environments, and feature different organizational tools. The most significant characteristic in terms of functionality is whether the conference is synchronous or asynchronous.

Of the five conferences I moderated, one was synchronous, the rest asynchronous. In each case, different groups of people were brought together for a one-time event. We used leased conferencing facilities.

First, let me describe the use of the two different modes; then, I'll compare their relative advantages. Finally, I'll outline the variety of functions you may wish your conferencing system to perform.

Asynchronous Conferencing Facilities

With an asynchronous conferencing facility, people can post their messages at any time of the day or night. You can opt for a structured approach to organizing the proceedings by posting under different content items or threading.

The major distinguishing feature of asynchronous conferencing software is whether the discussion is "threaded" or not. In a threaded conference, you're able to post a response immediately following the comment to which you are responding. In a non-threaded conference, separate conference items are opened and comments are posted under each item in the order in which they're posted. The best way to understand this concept is to visit NODE's Web site (http://node.on.ca/conferencing) and compare the Caucus and Allaire Forums conferencing systems. Allaire Forums is threaded, Caucus is not. Some people prefer threading, finding it easier to follow a discussion. That said, people who aren't familiar with threaded discussions may have trouble posting in "the right place."

Synchronous Conferencing Facilities

With synchronous software, everyone can be online, live at the same time. Different "rooms" or conferences can be created in which focused discussions can take place. That said, it's not as easy to structure discussion as it is with an asynchronous conferencing facility. For an example of a synchronous conferencing software visit Ingenia's MOO at http://moo.schoolnet.ca/moo/webroom/about.html

In this facility, once participants log in, they find themselves in the conference room where the forum is taking place. The first line of text at the top of the screen tells participants who else is logged in. People's comments are posted in a continuous flow and recorded as they're received. The most recent comments (at least eight lines) are visible on the bottom of the computer screen. Participants can refer back to earlier comments by clicking on the "Transcript" button.

Comparison

There is a significant difference in the two experiences; both modes have their strengths and weaknesses. Dr. Robin Mason, Senior Lecturer at the Institute of Educational Technology (IET) in Britain and Head of the Centre for Information Technology in Education, wrote the best summary I've found comparing the two modes.[3] Although Mason compares the two in the educational context, her findings are applicable here, as well.

Mason concludes that the four crucial advantages of the asynchronous media, in descending order of significance, are:

- flexibility — access can take place at any time;
- time to reflect;
- situated learning — the learner can easily integrate the ideas being discussed with the working environment;
- cost-effective technology.

The last two advantages apply equally to both online modes. Both are text-based; they require little bandwidth, and can be operated using low-end computers. Both modes allow for situated learning because the technology makes it possible to gain access from home and work. Ideas can be integrated with the working environment, and resources can be accessed from the Internet as required on the job.

The four equally compelling advantages to synchronous systems are:

- motivation — synchronous systems focus the energy of the group;
- telepresence — real time interaction helps to develop group cohesion;
- good feedback — synchronous systems provide quick feedback on ideas, and support consensus and decision-making;
- pacing — synchronous events encourage people to keep up-to-date, and provide discipline.

Mason recommends that personal learning styles and the larger educational context dictate which of the two is the more appropriate medium in a given situation. She has found that the trend is towards combining synchronous and asynchronous media in an attempt to capitalize on the benefits of both.

The strengths and weaknesses of the synchronous medium (and of this particular MOO design) were apparent in the synchronous conference I moderated. The two-day conference took place over 16 hours. High motivation and telepresence resulted in a 66 per cent participation rate. However, lack of time to reflect — and the fact that the entire conversation took place in one space — resulted in a disjointed dialogue. As the organizer said: "It's very difficult to follow the thread of the discussion since questions and answers appear on screen without order. There is no threading or streaming of comments and that makes the communication jumbled and disjointed. Eventually one learns to think less linearly and go with the flow, but it is an effort."

There would undoubtedly have been a more profound level of discussion in an asynchronous environment, given the participants' high level of expertise. But is was certainly a spirited and enthusiastic gathering; at one point, there were so many messages posted that the entire system crashed.

Other Features

Here are some other important features to look for.

- Can the moderator find out when a participant last signed on, even if a message wasn't posted?

Conferencing systems such as Caucus allow the moderator to see who is "lurking" (i.e., reading without posting). By knowing when people last signed on, you can find out who is checking in but not participating. You

can then contact them directly to find out why. We found that you can't make any assumptions about why people aren't participating. Some will have technical problems, some will have difficulty knowing how to interact, and others won't be able to fit participation in with work and travel commitments.

- Can participants type in a URL (a Web address) and automatically create a hot link to another Web site?

This is an excellent way for the moderator and participants to create access to additional resources.

- Can the organizer control whether or not participants can add new items to the conference?

If they can, the decision can be made as part of the conference design. (See Designing the Conference, on page 12.)

- Can the moderator edit participants' responses?

This feature allows the moderator to change the text of any item or response, regardless of who entered it; this way, you can deal with breeches of Netiquette or interpersonal disputes. We didn't need to use this function, but it was a feature of our asynchronous conference facility.

- Can the moderator delete or move comments posted by participants?

These features increase the modertor's ability to structure and control the conference.

- Does the organizer have the option to decide whether participants can edit their own responses?

Will participants be able to change their posted response? Or can only the organizer change items or responses? Again, this decision can be made as part of the conference design. (See Designing the Conference, on page 12.)

- How easy is it to modify the appearance of the site?

Once the conference is underway, will the moderator be able to change the conference greeting and introduction, post content under icons, add colour, bolding or special fonts? For example, we would have liked to use a different font or text size for administrative items, distinct from content, in our synchronous conference.

- What will participants know about each other? With some software, participants have the option of setting up a home page featuring phone and fax numbers, e-mail addresses, organizations represented, titles and personal information. This can facilitate networking during or after the conference.

- Can you e-mail participants within the conferencing environment?

This feature can greatly facilitate communication between you and participants, and among participants.

- Can participants be notified by e-mail about new messages posted to the conference?

With this feature, you can remind participants about the conference, and encourage them to revisit the site.

- In a synchronous conference, can the moderator receive private messages from participants?

This was the case with the synchronous software we used. Participants could send a private message to the moderator; the moderator, while not able to reply privately, was aware of the problems people were having and could post general advice for all to see. This allows people to save face by communicating problems to you alone.

- In a synchronous conference, are logs created?

This feature allows participants, especially those who can't attend certain portions, to review the synchronous sessions in an asynchronous manner.

For a more extended discussion of the features of online conferencing facilities, read "Presentation Features of Text-based Conferencing Systems on the WWW," by Daniel LaLiberte and David Woolley (*CMC Magazine* May 1997 at http://www.december.com/cmc/mag/1997/may/lalib.html).[4]

Designing the Conference

Once you fully understand the capacity of your conferencing facility, you can start designing the conference. Here are some of the decisions you'll have to make: will the conference be asynchronous or synchronous, open or closed; how long and what size; the agenda; the use of experts; clarifying expectations; circulating information in advance; confidentiality; and the languages to be used.

Asynchronous or Synchronous?

In some cases, you may have the option of deciding whether the conference should be asynchronous or synchronous. The previous chapter describes and compares the two facilities, and points out that the trend seems to be towards some combination of the two. For example, you might want to hold a synchronous conference at some point during an asynchronous one.

Open or Closed?

Based on your objectives, you'll need to determine whether you want the conference to be closed-access or open to the public. Of the five conferences I moderated, three were by invitation only and two were open to the public. That said, all of the conferences were password protected, and required the participant to register a user ID and password. In the closed conferences, registration was by invitation; access was denied to the general public. In the public conferences, everyone could register and the registration took effect immediately.

If you decide to make the forum accessible to the public, you'll need to have a powerful draw such as a topic of burning concern and/or the participation of subject-matter experts. It will be essential to promote the conference effectively to the target audience. For closed conferences, one of the strongest attractions is the chance to share ideas and network with a small selected group of colleagues.

You can combine public and private conferences. Our closed forum on workplace learning centres was followed by a public forum on the same topic. The report from the closed session was available on-site at the open conference, and the open forum was launched using the same topic structure.

How Long?

The length of your conference will depend on your objectives, the conference design, and the stamina of your participants and moderator. The five conferences I moderated ranged in length from two days to seven weeks. The most exhausting was the two-day forum, which was synchronous. The co-moderator and I were online for nearly 16 hours, with very few breaks. We were joined by four experts for a two-hour period, during which the entire system crashed because so many messages were being posted. The longest asynchronous conference lasted seven weeks to mirror the time period of a broader consultation process.

If you're organizing a closed conference to accomplish a specific task, you'll need to set a timeframe that is long enough to accommodate people's professional commitments, and short enough to ensure they won't keep putting off participating. You'll need more time if you're crossing time zones. One to two weeks works best for most asynchronous conferences. This gives people enough time for reflective input, and to accommodate other commitments. As well, time constraints encourage synergy.

Having said this, I've found that — in most asynchronous conferences — the highest volume of postings occurred within the first few days. However, it's important not to confuse quantity with quality and, keeping in mind conference objectives, many of the later postings were as valuable as the earlier ones.

In general, I've found that people who make a significant contribution find the length of the conference, whatever it is, just right. They seem to pace themselves to accommodate the time available. Others who aren't as involved want more time, perhaps because of other commitments during the conference period (or a tendency to procrastinate!).

The length of your conference will also depend on whether you incorporate a trial period during which people familiarize themselves with the facility before the conference officially begins. For our first online forum, we preceded the two-week conference with a one-week trial and orientation period. For subsequent conferences, we decided to scrap this approach. We found that the distinction between the practice session and the "real thing" became confusing, since it was hard for people to "practice" without getting into the substance of the conference.

In addition, we found that the conferencing facilities were user-friendly to the point that most people became comfortable relatively quickly. In our first conference, only one item was incorrectly posted — quite remarkable in a conference of new users.

What Size?

If you opt for a closed conference, you'll need to decide how many participants to invite. Our closed conferences ranged in size from 20 to 53 registrants. Participation varied greatly. In the largest, only 20 per cent of participants posted messages; the others used the facility to download documents and read others' comments. Most participants posted something during the smallest conference (the number of postings per person

varied greatly). If you have a very active group of participants who need to accomplish a task in a short period of time, it's probably best to restrict the number of participants to two dozen or so. People seem to have some difficulty in following lines of thought and keeping one another's identities straight in a larger group.

A participant in one of NODE's online conferences shares my impression as to maximum size: "Recently, I took a commercial online course with over 80 learners registered. Most of us were overwhelmed by the dozens of discussion threads that evolved. Some felt they had to read everything and, when they couldn't keep up, dropped out in frustration. The instructor couldn't keep up with facilitation tasks. I've since concluded that the size of a typical f2f (face-to-face) classroom (20-25) is probably appropriate for online interactions, as well."

However, when applying this rule of thumb, remember that your goal is to have some two dozen active participants. Depending on the task and the participatory level of your target group, you may need to invite double that number to obtain the desired interactivity level.

Setting the Agenda

When we began to structure our first online conference, we thought of approaching it like a face-to-face conference and addressing topics over time, as in a conference agenda. If you want everyone's input on all topics, this approach may not work because people sign in and out at different points throughout the conference. However, if everyone is certain to check back in before the end of the conference — or if having everyone's input is not a priority — you can stagger start times. A new topic can be introduced once the paper is posted or the speaker is online. However, the topic is best left open for discussion until the conference ends.

A total of 53 people signed on to the online conference on student assistance, with a gradual sign-on over the seven-week duration of the conference. New papers were introduced as they became available, and the opportunity to comment on all papers was left open to the end of the conference. In this case, there was a high incentive for participants to keep coming back to the conference to access the documents.

To set the agenda for the closed conference on workplace learning centres, we canvassed participants in advance on high priority issues; then, we structured items around these topics. We also left room for people to

introduce their own topics. For the subsequent open forum, we followed the same structure. For open forums where there is no opportunity to canvas participants on topic priorities, the ability to thread topics seems to be very valuable — that is to say, the capacity to provide a response immediately following a posted comment, thereby creating a subdialogue. For examples of threaded (Allaire Forums) and non-threaded (Caucus) see http://node.on.ca/conferencing

With some asynchronous software, the organizer has the option of allowing participants (or only the moderator) to start new items (i.e., topics for discussion). Make your decision with objectives and participants in mind. We allowed participants to add their own discussion topics in all but the first conference. In retrospect, we should have allowed the option in the first conference, as well. The new items added value and were not unduly confusing, which was our original concern. But make sure you're consistent. In our first conference, we allowed people to play with this option during a trial period, then took it away. This caused confusion.

Using Experts

One of the advantages of online conferencing is that you can involve experts from anywhere in the world. We invited experts to the two-day synchronous conference. Four discussion papers were prepared and made available in advance for downloading from the site. The authors were available online for a two-hour period. This opportunity to discuss issues with experts was a good draw.

For more lengthy asynchronous closed conferences, the introduction of experts should be handled with care in order to safeguard the group cohesion that participants establish. The introduction of a new person, especially an acknowledged expert, should be perceived as contributing to the group's goals. For example, if participants are informed in advance of experts' involvement, group cohesion is less likely to be affected negatively.

In most of the conferences I've been involved with, participants introduced new information themselves during the conference, often by creating links to other Web sites. As moderator, I've sourced new information, often at participants' request, and introduced it into the conference.

Clarifying Expectations

The most important tip I can pass along is to make sure that all participants are clear about the expectations that you have of them, and what they can expect from you. This message cannot be communicated too often. (See Circulating Information in Advance and Organizing the Site, on page 19 and 20.) For my first conference, I didn't do a good job of this one, and there was some confusion among participants as to their role in producing a document from the online discussion. This was my task, but I hadn't clearly stated my responsibility.

After this experience, I made a point of clarifying expectations up-front, for example what people could expect to get from the conference, and what we were asking of them. In the case of closed conferences, we asked people to commit themselves to spending a certain amount of time online. During our first conference, people spent an average of 15 to 30 minutes a day at the conference. We used that timeframe to estimate subsequent needs. For example, in the workplace learning centres forum, we wrote in the letter of invitation, "The estimated time commitment for the forum is about 12 hours over the three weeks."

For the student assistance reform conference, people received the following message: "Some investment of time (approximately one hour) is required in learning how to use the facility. We are asking participants to commit five to 10 hours a week to review the material and provide their opinions."

In addition, participants should understand the ground rules, including the process for creating new discussion items, the intended role of the moderator, the output expected from the group and individuals, and timelines. With asynchronous conferences, it's also important to clarify expectations surrounding response time. Participants who post comments should be reminded that they may not receive a response right away. If experts are going to be available to answer questions, it's important to establish "office hours," so that people don't expect an instantaneous response at any time of the day or night.

Educators offering online courses sometimes provide students with pointers on "Netiquette" (online or network etiquette). According to MaryAnne Andrusyszyn, one should "avoid writing in capitals since it implies you are shouting; avoid language that is condescending, hostile, inflammatory, racist or sexist; personalize words with the use of emoticons; [not] assume that everyone will know what you are talking about; compose

your thoughts clearly; be respectful of others' opinions, beliefs, and values; not dominate discussion; and be supportive of others by encouraging and praising contributions."[5]

All the conferences I moderated involved groups of peers; people were on their best behaviour and anxious to present themselves in the most favourable light. I never had to reproach anyone for inappropriate behaviour.

If you have concerns about netiquette, send an e-mail stating the rules of the conference to participants when they registers. The e-mail should be addressed to each person individually rather than as part of a general broadcast. The e-mail should include the request that people contact the moderator for clarification of the ground rules, or if they feel they can't abide by them. Make the e-mail very specific, providing examples of the exact nature of your concerns. Once the proceedings start, you can remove offending text with some conferencing software. Contact the person directly to discuss the problem. Even with a public access forum, people need to register; those who don't follow the ground rules can be blocked from participating.

Circulating Information in Advance

In the case of closed conferences, we communicated the ground rules by letter and/or by phone, and restated them online. For public access conferences, the message was delivered during the registration process by e-mail or phone, and online.

Materials mailed or faxed in advance to closed forum participants included: a formal letter of invitation to participate (people had been contacted by phone to establish their interest), ground rules (see above), background papers, bibliography, participant's list. In addition, the conferencing providers sent a users manual to help participants understand the conferencing software. The objectives for the public access "Outcome Assessment in Learning" forum were set out on the registration page under "What will I get out of this forum?"

You'll have to decide whether — and how — to circulate information to participants in advance. Asking participants to download documents from the site saves time and money for the organizers, and is the only practical solution for a public access forum. In a closed forum, you need to weigh the experience level of participants and their familiarity with computer

conferencing against the cost savings of online downloading. Asking participants to download information from the site can be a way of getting them to familiarize themselves with the facility. On the other hand, if the documents are lengthy and time-consuming to download, you might put off potential participants.[6]

Confidentiality

For closed conferences, you'll need to clarify the issue of confidentiality right at the start. People may not contribute to the discussion as frankly if they think that the transcript will be used for some unknown future purpose, or that they'll be quoted. For the closed conference on workplace learning centres, we wanted a full and frank discussion in order to prepare a report on the findings. However, we knew that the discussion might be constrained if participants felt they were going to be quoted. Our solution? We summarized the discussion and included quotes without attribution. State your policy on confidentiality up-front; otherwise, people will operate on their own assumptions, with ramifications for the forum.

Unilingual or Bilingual?

All the conferences I moderated were bilingual (i.e., the user chose whether to see the interface in English or French); all documents and major postings were in both languages; moderation and technical support were available in both languages; and participants were encouraged to communicate in the language of their choice. However, in all but one conference, most participants posted comments in English only. The synchronous conference was the most successful in encouraging contributions in French. This was due to the high number of Francophones who actively participated, and the high level of bilingualism of the organizer. In the other forums, most Francophones posted in English to make sure their comments were understood by the other participants. Other approaches to the conference design, such as holding two separate conferences and posting summaries from one to the other, might encourage more participation.

Organizing the Site

Participants will form impressions about the conference as soon as they log onto your conferencing site. The cues that will influence a participant's initial impressions include the physical look of the site, the wording of the welcome text, and the nature of the interactions between moderator and

participants, and among participants. In this section, I'll look at aspects of the physical design of the site that will influence the success of the conference: welcome message, background documentation, introduction item, help item. In the next section, I'll turn to tips on running the conference.

Welcome Message

When participants log on, they should be greeted with a message that has been carefully crafted to be as welcoming and non-intimidating as possible. Along with the welcome, you should reiterate the purpose of the forum, explain the structure and let participants know what to do next (e. g., "Please begin by posting an introduction about yourself under Item # and then make a comment under item #," or "Please go to "Read Me First.")

I recommend keeping this message as brief as possible and posting the ground rules elsewhere. For the conference on student assistance reform, our original welcome item was too long and took up too much of the screen. When we extended the forum, we shortened the message and put most of the background text under an icon. This made that first impression much more user-friendly.

Background Documentation

It's important to have any background information that was circulated in advance accessible on the site. For example, somewhere on the site you need to reiterate the forum's objectives, expectations of the participants, timelines, and ground rules such as who has the right to start new topics and the role of the moderator. In addition, we provided a variety of other resources as background for participants. A participant list outlining name, job title, address, phone, fax and e-mail helped participants establish connections during and after the conference. For the workplace learning centres conferences, we also asked participants to provide a description of their own learning centre; this helped put their comments in context.

To reduce the visual clutter on the site, and make it more approachable and user-friendly, I recommend housing background documentation under icons or providing hotlinks to a separate site.

Introduction

A good way to prompt interaction is to ask everyone to begin the conference by introducing themselves. This exercise serves several functions: it's an ice breaker; it forces people to learn how to interact with the interface; it lets everyone learn more about their fellow participants; and it gives the moderator information that can be used to pull people into conversation

HELP

Most conferences feature a "help" button so people can request help from the technical support staff monitoring the conference. In addition to the opportunity for private one-on-one assistance, it's useful to have an area where people can post their questions or tips to the entire group. This way people can learn from one another. I recommend calling the item "Help and Hints" to encourage more users to share their experiences with the technology.

Running the Conference

With all this preparatory work behind you, you're ready to run the conference. Two functions will be critical to a successful conference: the role of the moderator and technical support. I'd also like to highlight three important characteristics of the successful conference: encouraging participation, preparing summaries and providing closure.

Role of the Moderator

The moderator's functions can be organized under three categories: social, intellectual and organizational.[7] The social aspects of the moderator's job consist of "creating a community" so that people will be at ease; this will help them make the most of their participation, and open themselves up to others. To help them do this, the moderator needs to set the tone, establish trust, prompt input and monitor netiquette.

Your chief intellectual task as moderator is to contribute to knowledge building. In addition, and as part of this function, you may have designated tasks that are specific to the objectives of the conference, such as preparing ongoing summaries and/or a final report. (See Summaries, on page 24.)

Organizational tasks may include participating in the preparatory work of designing the conference, and organizing the site. During the conference, organizational tasks include managing the interactions (e.g., starting new topic items or closing items that have grown too large to manage, or rewording a message that is causing confusion).

In the case of synchronous conferences, there is real value in having co-moderators, one who is a subject-matter expert, and one who will concentrate on managing the discussion and dealing with private messages sent from participants. We could not have handled our 16-hour synchronous conference without using this approach.

For an indepth look at the moderator's role, refer to the companion guide: *Playing Croquet with Flamingos: A Guide to Moderating Online Conferences.*

Technical Support

High-quality and user-friendly technical support is an essential ingredient for a successful online conference. Your need for technical support will be highest as people sign on to the system for the first time; that said, it will continue, albeit at a reduced rate, throughout the duration of the conference. I recommend obtaining full-time technical support during the sign-on period for a conference of short duration.

Post sign-on, or in the case of conferences in which people sign on over an extended period of time, establish a reasonable timeframe during which participants can expect to get a response to technical queries. Also, to the extent that technical support is required for modifying the site (e.g., putting documents under icons), you'll find ongoing access to technical support essential.

Technical support should be available on-site through a Help button, and by phone for those who want to talk through a problem. For asynchronous conferences, it's very useful to have a Help conference item where people can post technical problems or tips and share the information with all participants. (See HELP, on page 21.) For synchronous conferences, consider setting up a separate room for technical discussions, moderated by technical support staff. That way, it won't disrupt the flow of the substantive discussion.

Technical support staff can also take on other responsibilities, for example providing a user's guide, setting up the conference, creating user names and passwords (including verification and last-minute changes), and creation of graphical links and templates.

Encouraging Participation

Encouraging participation is such an important function that you may want to assign both the moderator and the technical support team to the task. In several of our conferences, we took a missionary approach to "pulling" people online. Once they'd agreed to participate, both the moderator and the technical support team helped them until they signed on.

Depending on your conference objectives, this may be taking "encouraging participation" to extremes. At a minimum, you should send a message to all participants; include a welcome message, user name and password, help contact phone number and e-mail address. In addition, the moderator may wish to send a welcoming e-mail to participants once they introduce themselves at the conference.

During the conference, the moderator can use a number of techniques to encourage participation. For example, we felt it was important to acknowledge everyone personally the first time they signed on. It's a way of saying, "Hello, we hear you and we're glad to have you with us." People have a good many apprehensions about their first sign-on. Everything from "Am I doing this right?" to "Are people interested in what I have to say?"

We often referred to people by their name when responding to a suggestion or building on an idea. There can be a sense of being invisible, and people who make comments that are left without response — especially if they're new to online conferencing — might not come back.

As the conference proceeds, you'll need to pull in less active participants. I often asked questions to a participant by name, sometimes following up with an e-mail. My summaries of the conference proceedings also included reminders, in cases where we were still waiting to hear from someone in response to a question. (See Summaries, below.) In order to address questions to people in this way, I needed to be aware of their agendas. That way, we didn't leave questions hanging there for days with no response. Instead I could say: "We'll pose this question to Joe when he's back online after X date."

For ideas on how to facilitate and encourage participation, look at *Playing Croquet with Flamingos: A Guide to Moderating Online Conferences.*

Summaries

In most of our asynchronous conferences, it was the moderator's job to provide periodic summaries of the conference proceedings. These detailed summaries allowed anyone just entering the conference to find out what had been said under each topic item. They also allowed regular participants to see patterns in the contributions, and kept them from getting lost in the details.

We developed a model with the following three components: the summary of the discussion, outstanding items (e.g., "Sharon has asked whether anyone has a suggestion on X"), and a leading question designed to stimulate further discussion. The summaries were highly valued by the participants; I recommend them as an essential component of most online conferences. We tended to prepare the summaries every few days. You can decide on the frequency of the summaries based on the amount of dialogue and the moderator's recommendations.

Closure

Bringing closure to the conference is very important. Let people know what they can expect next. Will there be a final report? How can they get it? Can they come back to the forum site to read it? How long will the site remain accessible? Are there plans for future events?

Bringing closure also provides an important social function. On the final day of asynchronous conferences, we posted good-bye messages early in the day and provided opportunities for people to make final comments. If you've been successful at creating an online community, people will need to take their leave by posting good-byes or final thoughts. For the synchronous conference, we devoted the final hour to a dialogue about the experience.

There may be a desire to continue the discussion or sustain this gathering of like-minded people. As a follow-up to the synchronous conference on "Outcome Assessment in Learning," the organizers set up a listserv in order to foster a community of interest.

Conclusion

I hope you'll benefit from the lessons I learned. Let me leave you with this proviso: I've probably given you the impression that, if you follow my advice and take the steps I've recommended here, you'll be able to control the outcome of the conference. Unfortunately, this is not the case. The reality of online conferencing is best summed up by Dr. Richard Farson, who moderated an online conference on "Management of the Absurd," and whose thoughts eloquently sum up our own experience:

"I think that is the lesson to be learned from computer conferencing — it has its own direction; it is very difficult to control. It is something like Alice's effort to play croquet with live flamingos — they [were] alive! That's what happened in the conference — it was alive and, therefore, not controllable. On the other hand, it developed much more enthusiastically and satisfyingly than I ever expected."[8]

Appendix A: Resources

The NODE is a not-for-profit electronic network which aims to facilitate information and resource-sharing, collaboration, and research in the field of learning technologies for education and training. For examples of the asynchronous facilities referred to in this guide, visit their Web site at http://node.on.ca/conferencing/

NODE's Technologies for Learning site (TFL) includes pages dedicated to "Conferencing and Chatware." A section called "Notes From the Field" includes reports detailing the experiences of those who have used conferencing, and chat technologies in developing and delivering post-secondary courses. See http://node.on.ca/tfl/conference/fieldnotes/

The following papers are referred to in this guide, and can be accessed from this site.

- "Instructor's Guide to Computer-mediated Conferencing," by MaryAnne Andrusyszyn.
- "Psychological Type as a Tool for Online Groups," by Tony Di Petta, an abridged version of a chapter, "Type as a facilitation tool in computer conferencing," in Cranton, P. (ed.) (1998). Psychological Type in Action, Psychological Type Press, Sneedville, TN.
- DEOSNEWS Vol. 1 No. 19. The Distance Education Online Symposium, "Moderating Educational Computer Conferencing," by Robin Mason, Institute of Educational Technology, The Open University.

http://www.cnet.com/Content/Builder/Business/Community/?st.bl.fd.busz.fe

This Web site focuses on building online communities, and features 10 tips for building online communities and five case studies of online communities.

http://star.ucc.nau.edu/~mauri/moderators.html#cmcbooks

The Moderator's Home Page provides resources for moderators and facilitators of online discussions.

http://thinkofit.com/webconf

Conferencing on the World Wide Web reviews Web software for asynchronous group discussions, including resources and examples.

"Ten Ways to Make Online Learning Groups Work," by Lisa Kimball, reprinted from Educational Leadership, Vol. 53, Number 2, October 1995.

Notes

1 See "Psychological Type as a Tool for Online Groups," by Tony Di Petta at (http://node.on.ca/forums/).

2 See "Issues Paper on Social Access to Learning Technologies," March 1997, available at http://oltbta.hrdcdrhc.gc.ca/new/sasumme.html

3 This quote is from Mason's paper "The Globalisation of Education" which can be found on the NODE Web site at http://node.on.ca/tfl/conference/fieldnotes

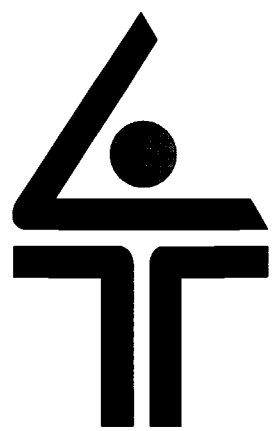
4 For a review of asynchronous software, visit Conferencing on the World Wide Web; a Web site maintained by David Woolly reviewing Web software for asynchronous group discussions, including resources and examples, at http://thinkofit.com/webconf

5 See "Instructor's Guide to Computer-mediated Conferencing," by MaryAnne Andrusyszyn available at NODE's Technologies for Learning site at http://node.on.ca/tfl/conference/fieldnotes/

6 Terry Anderson makes the following observation about circulating information in advance: "Since most people read longer documents on paper, costing shifts to the participants. The arrival of a package by mail cues that an important event is about to commence and shows the preparation and value attributed by the organizers."

7 This categorization is suggested by Robin Mason, *ibid.*

8 Interview with Dr. Richard Farson, quoted in "Moderating Educational Computer Conferencing," by Robin Mason, *ibid.*



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