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This slide deck is not and was never intended as a presentation. It is a set of resources I put together to draw upon in a series of workshops on facilitating online learning I did in November and December 2011 in Victoria and Tasmania states, Australia. These will make little sense as either a linear flow or as a stand alone set of resources. I have done my best to annotate them so people who were in the workshop have something to refer back to. Thanks!

Start:
Welcome & Forming Our Agenda

- The non-agenda
- Pay it Forward
- Slides as resource options (later online)
- A paired exercise: identifying key questions
- Improv "Color/Advance" practice
- Recap, Resources and Sharing, Resource wiki

This was the negotiable agenda starting point

I did not prepare set agendas for any of the workshops. I prepared options for "get to know" exercises and for working on specific issues through case clinics and a method called "reverse brainstorming."

Pay It Forward

At the end of each workshop I asked people to identify what they thought I should tell the people in the NEXT workshop. I then included pictures of those ideas to kick off the subsequent workshop.

TUE AM PAY IT FORWARD

- SHARED CHALLENGE IN APPLYIN E LEARN
- WORK W/ OTHER ON STRATEGY + PLANNING
- EVALUATION - heading in right direction?
- E Learning champions + communities bottom up —SUE's 2nd Semesta Secondree)
- Case clinics
- Hearing other stories / depts
- Get to know others / meet / hear - lots of creative people
- Tech to support quality teaching
- Safe online space to get Q/A
- Institute - would like it to put teaching & leany @ centre

DO NEXT

① TAKE A CRITICALLY REVIEW AN ONLINE COURSE (SHARE-REPETOIRE

② Evidence based research about e-learning

③ Be PROACTIVE

④ FIND OUT WHAT OTHER PEOPLE KNOW — What keeps you awake @ night — Imagine future — want

⑤ Share Fair

⑥ Learn from Mistakes — Laboratory of inquiry

WED AM PAY IT FORWARD

- PARTICIPATE ONLINE YOURSELF
  +/-

- CoP concept (vs just compliance)

- Design w/ learner's perspective

- Positive backchannel

- STRUCTURE — — — — — — FLEXIBILI
              continuum

PAY IT FORWARD
WED P.M.

- Compliance
- Communicate w/ colleagues (Fishbowl)
- CoP → doing it. Learn together
- 2 diff TAFES...similar exp. but diff. constraints
- Way to support staff in having their case heard
- ~~is~~ what online learning is about
- Common language in our org (create)
- FB → cyberbully excuse (how diff than forums?)
- Keep the spark (despite C word)
- Action Learning. Pawor of convo. Share problem w/ many reduces prob
- Speed elearning mentoru

- There are lots of passionate teachers out there for our students.... may mgmt see this

- Excited to ID oppty. "Outside the compliance box"
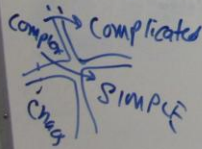 → less structure less wrong... ☺

© Find the superpower in every student!

© Building & discovering Identity

© Student created content / POWER

© Line of site in virtual world

© Reverse brainstorm → uncover issues

© Case study / fishbowl

© Shared battle

© Safe fail experimentation in complex contexts

Cynefin

Complex → Complicated

Chaos → SIMPLE

PAY IT FORWARD FRI AM

- + + Group diversity
- DOING TECH + CONVERSATION
  "DO/SEE"
- Realist/pragmatists +
- I can't see taking classroom online,
  but I can see bringing online
  into the classroom (Flickr Story)
- Removed some fear of tech unknown
- a) be comfortable w/ tech
  b) tech be relevant to aud.
  c) practical
- Reflective practice (vs just content)
- Ask, don't assume
- Don't go alone

PAY IT FORWARD   12/7   An

TECH DOESN'T HAVE TO REMOVE SOCIAL CONNECTION

Community of Practice
   - how we talked about it

DESIGN FOR POWER ISSUES

WARM ELECTRONIC COMMUNICATn
   HIZZLE - Heard Seen Loved

Dousing WABTO MEET LEARNERS (DIVERSE) Need
   tech in service of...

≠ DISTANCE DED (NOT!)

YES ⇄ GOOD TEACHING

WHY WHY WHY
How is online enhancing learning
PARTICIPATION / REIFICATION
MODIFIED FISH BOWL

Buckets of Possibility

- Social Learning
- Communities of Practice Perspective
- Community or??
- Purpose
- Relationships
- Engagement &
- Activities
- "What does a great community look like?" "Great (e)learning?"

This was a list identified before my visit.. As it turns out, we never really used it as a "whole"

Thirty Five

- Write down your biggest question about using community strategies for online learning on front of card.
- Move and swap until I say STOP
- Pair up and split 7 points between the two cards and write each score on back.
- Move when instructed
- Stop and rate when Instructed

This was an activity we never used. ;-)

Reverse Brainstorming

- Find out more here:
  http://www.kstoolkit.org/TRIZ
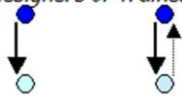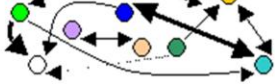
We used this activity a LOT!

More methods can be found here: http://www.kstoolkit.org/KS+Methods

Social
Learning
…and a CoP lens

At many of the introduction workshops, I asked the group's indulgence to frame my approach with a "community of practice" lens. I recognize that the definition of "social learning" is a bit limiting. What I'm referring to is the social aspects of learning. This is my "catch all" for learning with and from other people." See http://www.ecologyandsociety.org/vol15/iss4/resp1/ for background on social learning.

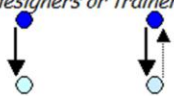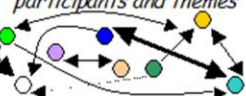| APPROACH →	Conventional	CAS
	Controlled & managed by designers or trainers	Self-ordering among participants and themes
↓ ASSUMPTIONS ABOUT LEARNING		
Sources	Expert-driven lectures & skill building sessions from faculty-to-participants	Quality of connections, acknowledged diversity, & information flow among participants
Finding Direction	Limit learning objectives to meet pre-determined expectations; alignment is valued	Explore a broad landscape that evolves with diverse, unfolding interests; coherence is valued
Content	Narrow specific content to each discipline; keep learners segregated	Explore theory & practice that spans or transcends disciplines; mix learners

Source: Keith McCandless
http://socialinvention.net

I shared two images from Keith McCandless which help show the shifts we are experiencing in society at large and which can and are (in some cases) happening in teaching and learning. Look not so much at the details of both of these slides, but the differences between Keith's colums of "conventional" and "CAS" (Complex Adaptive Systems). Keiths other work, by the way, is great and worth a look. Check out his "liberating structures" http://socialinvention.net/LiberatingStructuresHome.aspx

APPROACH → ASSUMPTIONS ABOUT LEARNING	Conventional *Controlled & managed by designers or trainers*	CAS *Self-ordering among participants and themes*
Continuity	Focus on shared values & vision to provide stability for learners	Focus on differences that make a difference to evoke or edCuce new insights
Purpose	Sharpen critical thinking & judgment by providing more expert information	Draw out generative thinking & resilience by connecting learners
Defining Success	Individual achievement and mastery; competency building or gap-closing	Social sense-making in communities of practice; creative advances into novelty
Agenda	Tightly managed to minimize what might go wrong or out of order	Semi-permeable boundaries that create conditions for self organization
Learning Process	Controlled execution to achieve pre-determined objectives & standards	Messy exploration to achieve higher levels of fitness & unique results
Setting	Limit the number of sensory inputs & unscripted movement	Diversify sensory inputs and encourage self-directed movement

Source: Keith McCandless
http://socialinvention.net
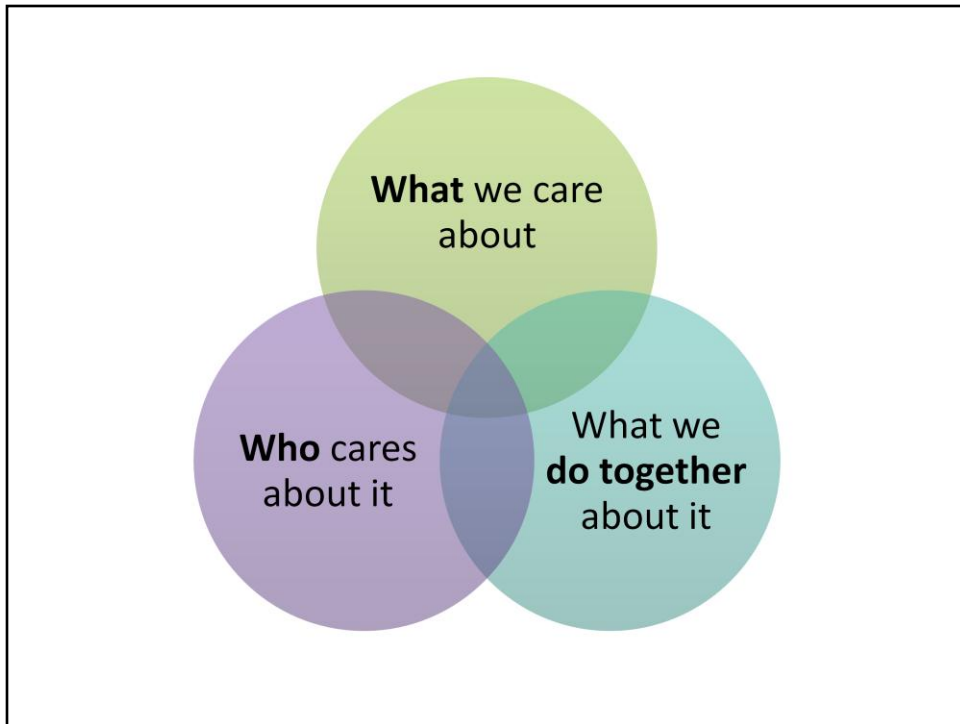
It helps to have a framework and a language as we design, execute and evaluate our communities. It gives us a shared language.

This model comes from the communities of practice literature (Etienne Wenger, Jean Lave and others – see http://www.ewenger.com/theory/index.htm for a starter) and gives a nice three way view. We have "What we care about," "WHO cares about it" and "What we do together around this thing we care about together!" Said more succinctly: who, what, how.

Now throughout this workshop, I will draw on theory, but I'm a practitioner and in the end, I want things I can PRACTICE. So I'll bookend everything with practical tips. If you aren't getting what you need – speak up. So here is the first tip. Communities are always changing. If they aren't, it's worth asking "is it time to mix things up a bit?" But let me add a caution. Don't mix all of these three things up at once. That creates too much instability and confusion. For example, switching up practices can get things flowing. Bringing in new people (or gently encourage those who have outgrown the community to leave) is useful to do now and again. (Hat tip to Etienne Wenger and John Smith for that advice!)

Practical hint: all three of these "legs" change over time. The trick is not to have all three changing at the same time. That can be very destabilizing for a community!
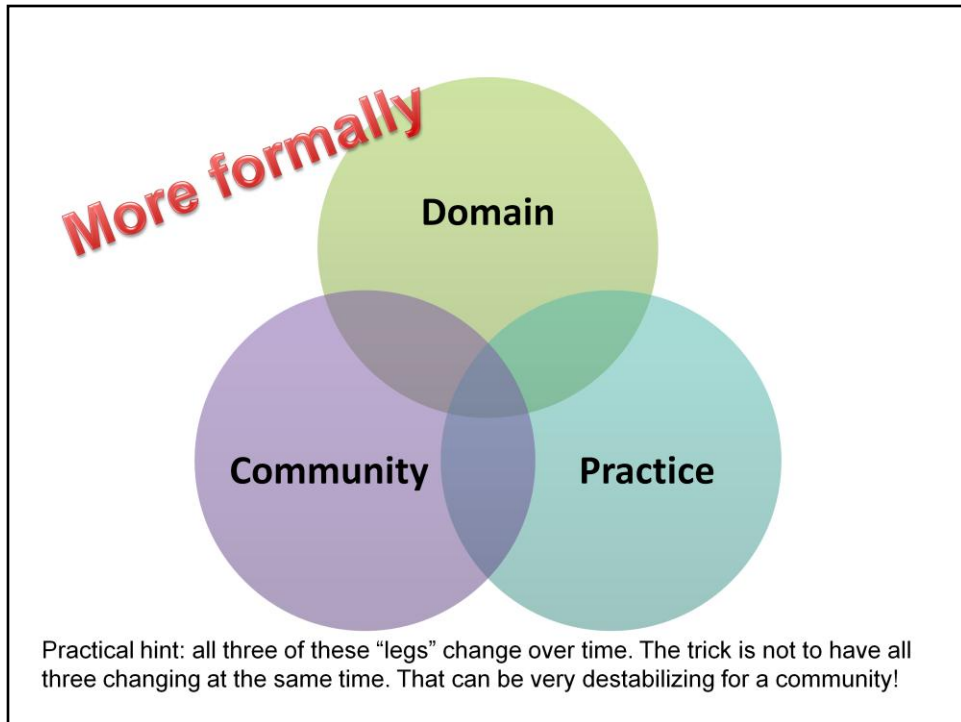
We can also use the more formal language from the communities of practice literature. The point is, we need some shared language, OK?

Purpose
…and how it influences design

As in anything, if we have some sense of what we are trying to do, we can use that to drive our pre-assessment, design, implementation and evaluation of our work. It doesn't have to be totally fixed or extremely detailed. But if we have no direction… well, you know what happens! Sometimes that "kismet" is great, but most of our institutions are not going to support that.

I say "we" but institutionally that might mean what the government or a client cares about, what leaders or administration care about, what teachers and facilitators care about or even WHAT LEARNERS care about!

Purpose...
what is
required?
What is
evolving?

http://www.flickr.com/photos/slieschke/2271415384/

Purpose might start broadly and get refined. Or the other way around. If you are teaching something year over year, it is important to ask "has WHAT we cared about changed? Become broader or narrower?" We often start with "big umbrella" purpose statements. But after some experimentation, we can better learn what is useful and important to people. What we say gets them "jumping out of bed" in the morning willing to dedicate some time and attention to their community.

http://www.flickr.com/photos/slieschke/2271415384/

Purpose

- Purpose checklist
- For at least 3 audiences
- Short/long term
- Communicable
- WIFM, empathy map, passion, self identification & identity

I have an old resource I often share called the "Purpose Checklist." You can find the generic version here http://www.fullcirc.com/resources/online-community-toolkit/online-community-purpose-checklist/ and a version I made for these workshops here: https://onlinefacilitation.wikispaces.com/Purpose+Checklist+AU

By the way, WIFM stands for "what's in it for me"

Purpose and Strucure: Do you really need (another) community?

It is harder to "build" online communities today than five years ago because people can and do already belong to many of them. Our problem used to be that few were familiar and comfortable interacting online. Now the challenge is they are too busy interacting online --- somewhere else. So ask yourself: before you develop a walled online community approach to a course, is there someplace these learners are already gathered and interacting that you can "piggy back" on to?
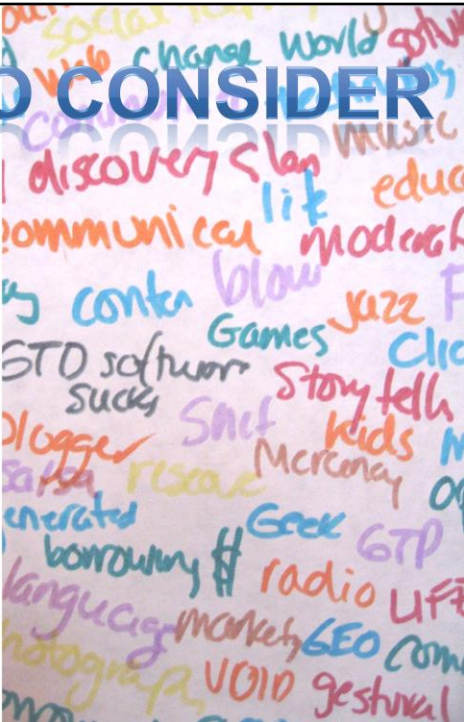
Me, We, Networks

See this slidedeck

http://www.slideshare.net/choconancy/where-am-i-aiming-we-me-and-the-network-ttix-2010
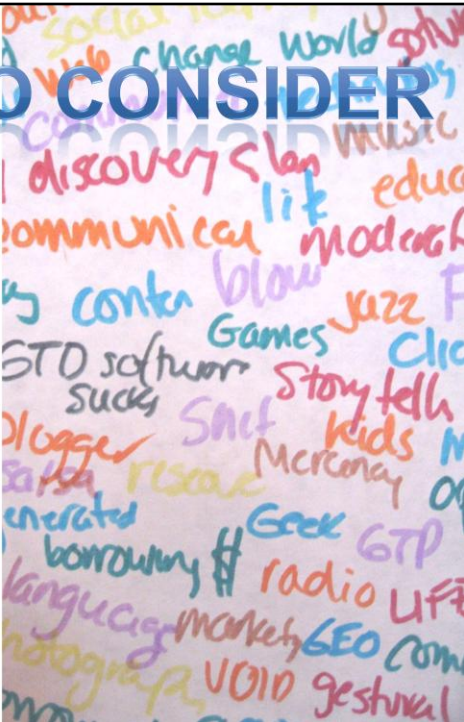
: solo, pairs, triads, P2P, networks and "adjacent opportunities"

PATTERNS TO CONSIDER
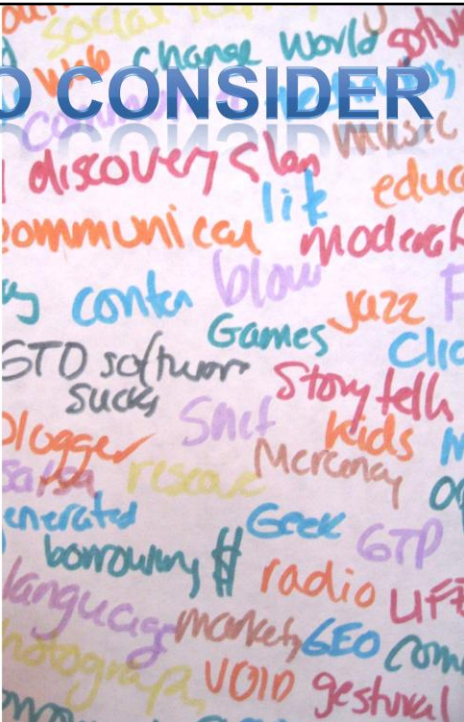
- Small group structures to deepen
- Network structures for scale
- Size and sequence
- Design to balance investment and returns

If we consider that "communities" aren't the only form available to us, we can see some patterns emerge, including small groups for deeper, more interdependent work (like task teams), open, more network like structures to scale out across larger sets of people; the relationship between size, time sequence and community design, and finally, a reflection: we should design to balance our investments and returns. Figure out when you should go simple, fast and run with it, and when you should do a deeper design process. Both are legitimate depending on the context!

Some examples/decision tree

Short term, focused	Explicit purpose Event associated Defined resources Defined membership	Starts, works, finishes.
Broad, content attractor	Information aggregation /source Broad content exposure Defined resources Little member decision making	Commitment to content Visits vs. engagement Little member "ownership" or association (identity)
Small exper-iments	May emerge out of events Voluntary or attracted Emergent structure Often little/no resources	Innovate, then scale "Skunkworks" Trigger phase change to more structure.

We can look at time as a variable in our community design and deployment.

I characterize short term communities as having a discernable beginning, middle and end around a specific purpose, outcome or activity. For example, there is a major event or initiative and a community is set up around that event. There is a very clear target audience and a defined set of activities. These time-delimited communities can be very successful because people are more easily willing to commit for set action items within defined time ranges. They have a sense of their ability to say yes. These can also be seeds for longer term communities if there is sufficient attention to relationship and evolving with and to member needs over time, or they may simply be ended and archived. Both are realistic strategies.

Some communities start open-ended with a broad topic and a wide invitation to participants. This strategy often builds on the aggregation of content that might be useful in this topic area and people come, browse content and some interact. It is a way to build general interest and begin to affiliate with others interested in the topic. This strategy can be thought of as building or tapping into a network of people interested in something. Once established, there is a critical strategic choice to be made: continue to use resources to keep the information hub going (as a service) or begin to cultivate and weave relationships to move people from information browsing to some other kind of interaction. This might be identification of sub-communities of interest, attracting experts who might be willing to share their knowledge etc. The key thing about this approach is within about a year, there needs to be an assessment and decision about the next phase or you end up simply providing content.

A third less common but very useful pattern is launching with small experiments and smaller numbers of members. This strategy is good for complex or emerging

Some Comparisons

	Who belongs	Purpose	Cohesiveness	Duration
Formal Org.	Hierarchical reporting	To deliver a product or service	Organizational goals	Until next reorganization
Project Team	Management assigned	To accomplish a specific task	Project goals	Until project is complete
Community of Practice	Voluntary, invited or self - selected	Build & exchange knowledge	Passion, identity, commitment	As long as interest remains
Informal network	Friends and acquaintances	Collect & pass on information	Mutual needs, friends hip	As long as reason to connect exists

Etienne Wenger 2003

There are a variety of ways to look at design and structure. The bottom line is, when we have a way to look at and talk about our communities, we can do our work with more intentionality. So regardless of the framework , you adopt, it is useful to HAVE a framework. It helps us remember to think about strategy, implementation and reflection/evaluation. (This presentation does not go deeply into the latter – and probably should!)

Context & Goals Influence Size of Learning Community
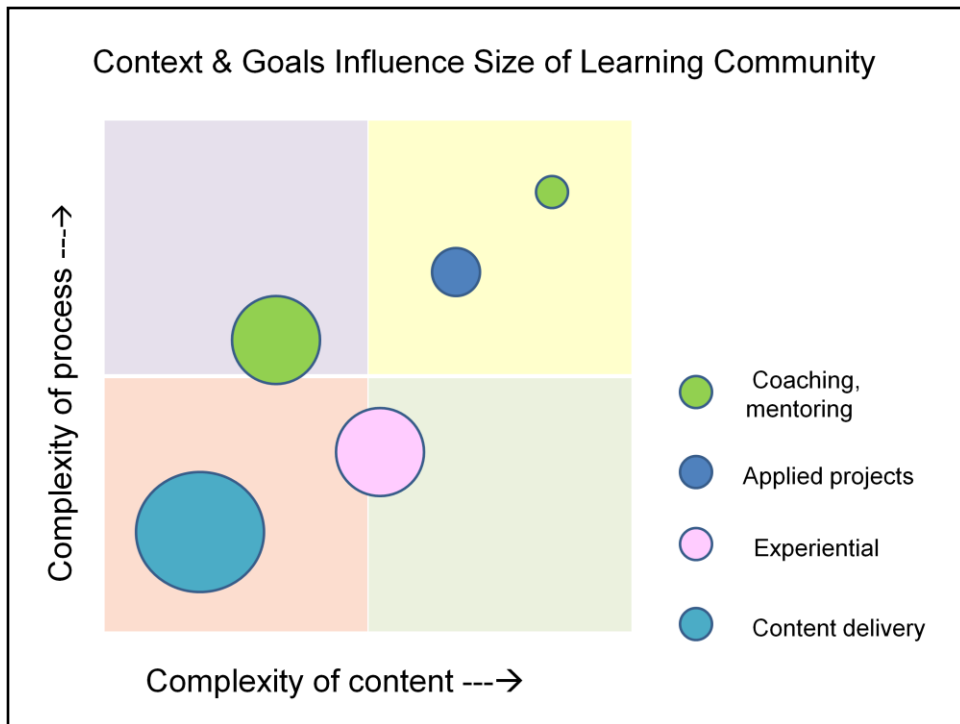
Adapted from the Community Roundtable deck (used with permission).

The Community Roundtable is a professional group focused on online community management. They offer research materials, seminars and the like. I told Rachel Happe, one of the principals, about this workshop and she was happy to let me use some of the slides from her deck. Thanks, Rachel! This one helps us think about the relationship between purpose (WHAT we do) and size of community. Their research suggests that higher levels of complexity require smaller sized communities, while less complex contexts can have a larger number of members. To me this also guides our facilitation strategies. In a task focused context, project management is a focus. In information sharing, organization of content (i.e curation, tagging, etc.) would predominate.

So we start layering here --- getting away from "one size fits all" and instead look for patterns that help inform our design and support of a community. Let's look at a few more patterns.

http://community-roundtable.com/

Community Maturity Model ™

	Stage 1 Hierarchy	Stage 2 Emergent Community	Stage 3 Community	Stage 4 Networked
Strategy	Familiarize & Listen	Participate	Build	Integrate
Leadership	Command & Control	Consensus	Collaborative	Distributed
Culture	Reactive	Contributive	Emergent	Activist
Community Management	None	Informal	Defined roles & processes	Integrated roles & processes
Content & Programming	Formal & Structured	Some user generated content	Community created content	Integrated formal & user generated
Policies & Governance	No Guidelines for UGC	Restrictive social media policies	Flexible social media policies	Inclusive
Tools	Consumer tools used by individuals	Consumer & self-service tools	Mix of consumer & enterprise tools	'Social' functionality is integrated
Metrics & Measurement	Anecdotal	Basic Activities	Activities & Content	Behaviors & Outcomes

http://community-roundtable.com/

Here is a really interesting set of perspectives, again from the Community Roundtable. One thing I'd caution is this progression makes the assumption that moving to the right is "better" than "staying on the left." I'd counter that it really depends on the type of community. But simply by scanning across this, we can consider perhaps soe different possibilities and perspectives for our communities. It is easy to stay stuck in one pattern – perhaps the one you first experienced or the fairly basic mandate you started with – and miss how your community can evolve.

What is your purpose?
What structure makes
sense for your offering?

We usually say we are talking about teachers and students. But I think it is more than that.

Who
cares
about it

WHO: Relationships

How social interactions impact design, delivery and assessment of (e) learning.

Relationship & design considerations

Who with whom

Identity and Terry Love the Plumber

(who w/ whom, trust, role modeling, failure, reciprocity, small things, safe/fail, yes…AND, offers & blocks, questions, public/private, social contracts & transparency)

Do we have the right people. One observation I had about many of the communities I've observed is that they started with a big, broad topic and threw the doors open. Or they appointed focal points from various organizational areas to be members… and those people either saw it as an obligation, or weren't really practitioners of the domain themselves, so couldn't really get the practice part of the community. Ask yourself… do you have the people who you need strategically? There are also some challenging sub audiences to engage online for many of you, like busy policy makers! They may need smaller, more private and time-limited engagements.

http://www.flickr.com/photos/swissrolli/2167756791/
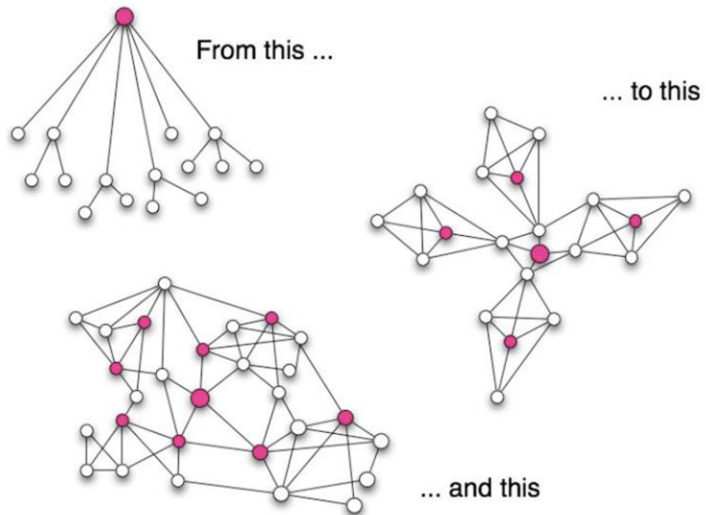
Uploaded on January 5, 2008
by **swissrolli**

How to encourage relationship

- Between you and learners
- Between learners
- Between learners and "real world" practitioners

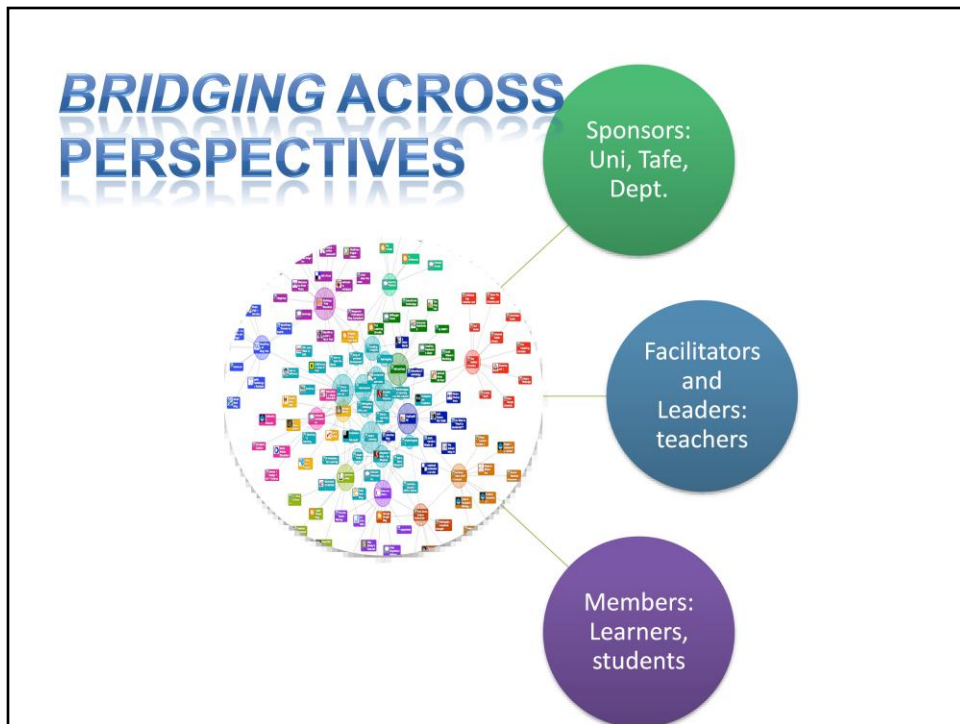Change in relationships

From this ...

... to this

... and this

From David Wilcox

Hub and Spoke vs Network
intimacy and scale

As we look at both design, deployment and evaluation, the reality is often that we have "three bosses" --- three perspectives we have to harmonize at some level. I've found it really helps if we keep these in mind early on – especially in initial design and in early design of a monitoring and evaluation approach.

Each of these perspectives are critical. Sometimes they may be shared and sometimes contradictory. Sponsors may want members to do something they have no interest in doing. Facilitators may feel unappreciated by both sponsors and members. By being able to step back and consider each perspective, we are more likely to bring the shared desires to the forefront and minimize the disconnects.
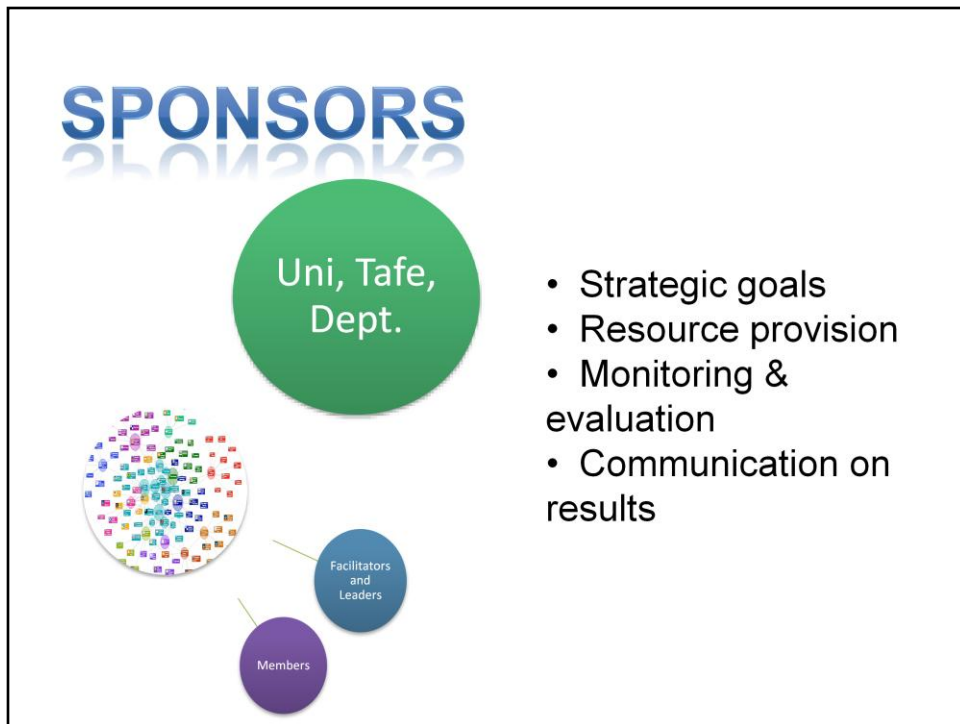
By sponsors, we most often mean someone in a leadership position in an organization, a department or division or an organization itself. Sometimes sponsors are simply people who want to see something happen.

Sponsors need to know they are investing in the right things and that those things are being done well. Those responsible for communities and networks should have a clear agreement with sponsors on goals, resources that can be provided, clarity on what will be measured, evaluated and how, and clarity on what the sponsor wants to be informed on in an ongoing manner. These can, and often should be, modified over time. Creating them at the start provides clarity that helps all involved. The only time the sponsor perspective is not strongly represented is when a community is formed informally or intentionally "under the radar" to protect an emergent idea that may not be ready for full organizational exposure. Of course, there are risks to this approach, but many successful communities emerged, rather than being mandated from above. ☺
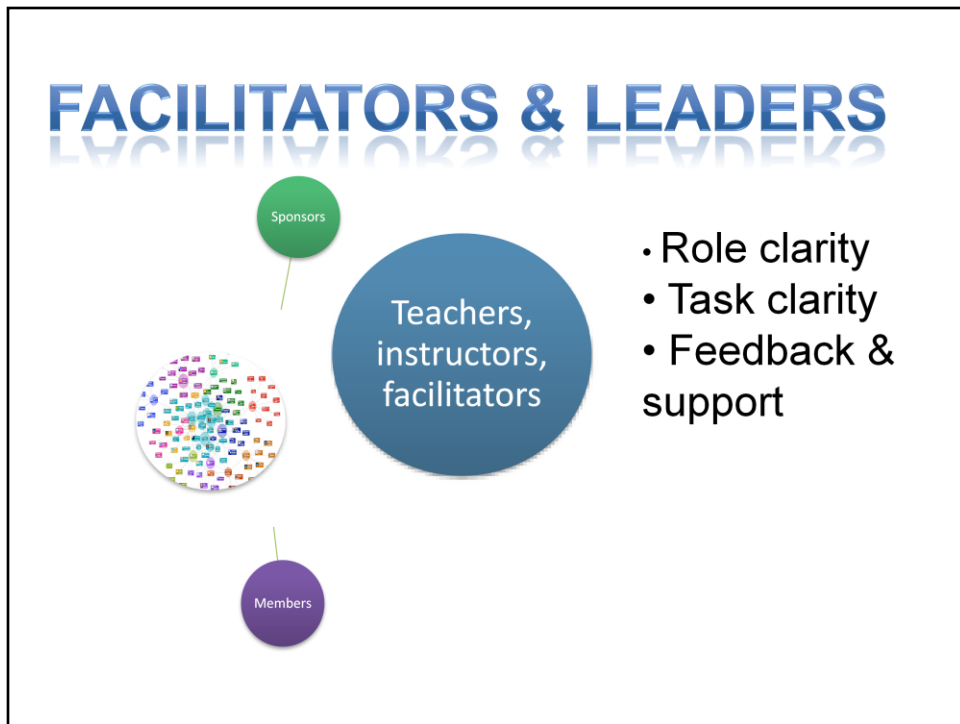
Facilitators and community leaders are both key in making things happen in a community or network. Typically the facilitators have a clearly defined role, often supported in some way by their organization. Community leaders, on the other hand, are most often volunteers. Both play vital roles in a community and often they share a similar perspective. (However, when you go to a more detailed level of analysis, I'd split these apart!)

Facilitators and leaders are task focused and thus value role and task definition. What should I be doing? How? By when. Sometimes this means training and support from more experienced facilitators. It means allocating time. One thing that is often missing for them is feedback on how they are doing and what value they are adding. This is critical for sustainability.
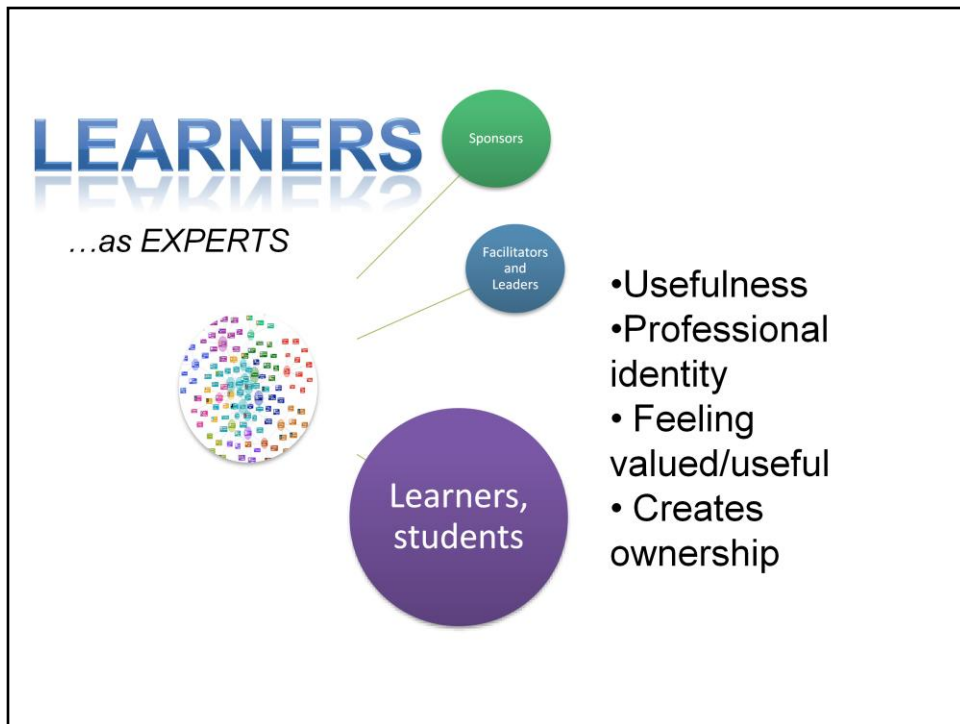
Finally, but most importantly, we have the member perspective. There is no community without the members. No network. Today people can participate in so many communities that their level of engagement is spread thin. So the most important question we have to ask – and keep asking – is the purpose of our community valuable and relevant to members? Are the activities worth the time and attention it takes members to participate? Once we have achieved relevance for them, what kind of engagement is needed to help the community fulfill its potential?

Power

How often do we explicitly talk about power? Consider it in our designs? This turned out to be a topic many brought up and engaged with across the workshops.

Practice

…the action of
social learning
part 1 - patterns
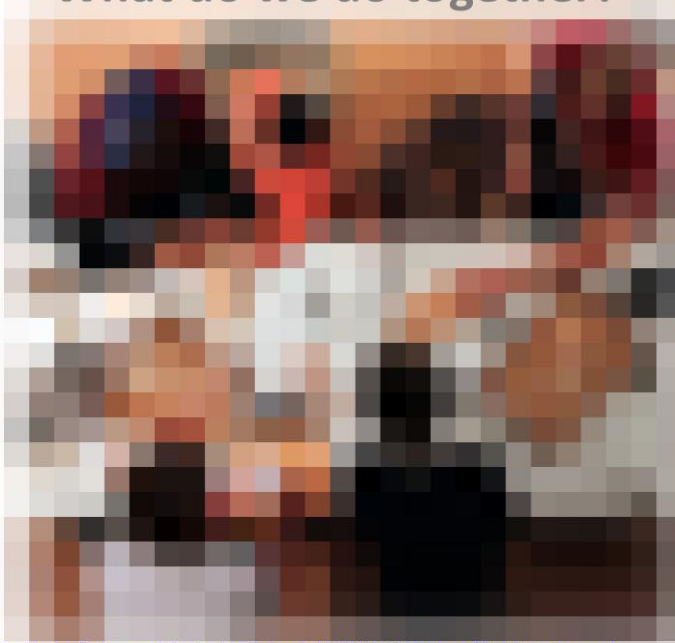
What and how we **do things together**

Engagement & Support (Design, DNA, formal/informal, lurking, small/delimited to complex, rhythms, S/F experimentation,, power, making invisible more explicit)

What do we do together?

Our **roles**

How we interact to **solve problems** answer questions

How we **foster trust** & engagement

How we **capture and share** what we **learn & do**

Interweaving Support, Engagement and Learning Outcomes

I made a design suggestion at some of the workshops that we blend support, encouragement and learning outcomes together. What I mean by this is don't do something stand alone to orient people to a new tool. Use the orientation as a moment of relationship building, learning or evaluation. People seem to be especially bored and turned off when guided through a tool step by step. They remember little. And once you start losing people's attention, you have a probloem!

FORMAL/INFORMAL TENSION

- From : http://blogs.hbr.org/cs/2010/04/spreading_critical_behaviors_v.html
- Formal programmatic efforts to change behaviors work mostly on the **rational** side of human behavior
- Informal experiential efforts can capture the **emotional** side
- Programmatic change takes more time& costs more and encounters more resistance than "viral" change
- You need both over time
- A "viral" effort usually begins with a few respected "master motivators"
- Insights & approaches of the motivators work best in experiential settings
- Experiential momentum sustained informally & formally
- The most important lesson: importance of cross-organization energy & its dependence on the informal

Another lens is that of formality/informality. I came across this set of observations in the Harvard Business Review and thought it would be useful to share because you, coming from a large organization, AND working with very diverse constituents from around the world may often work with organizational expectations of formality. What this article helps us remember is that we need both formal and informal and communities – where people come together – can often be a nexus point for the informal.

Now, this can often be interpreted as the "fluffy bunny" stuff – you know, emotions, relationships and such. I work with a lot of scientists and economists and there is a tendency for some to shy away from this language. Yet when we look at their practices, they do this all the time. They just talk about it differently. The bottom line for community facilitators and managers is you need to attend to social practice as well as the subject matter.

Bounded or "Out in the World" Interaction

See http://www.slideshare.net/choconancy/triangulating-our-professional-development
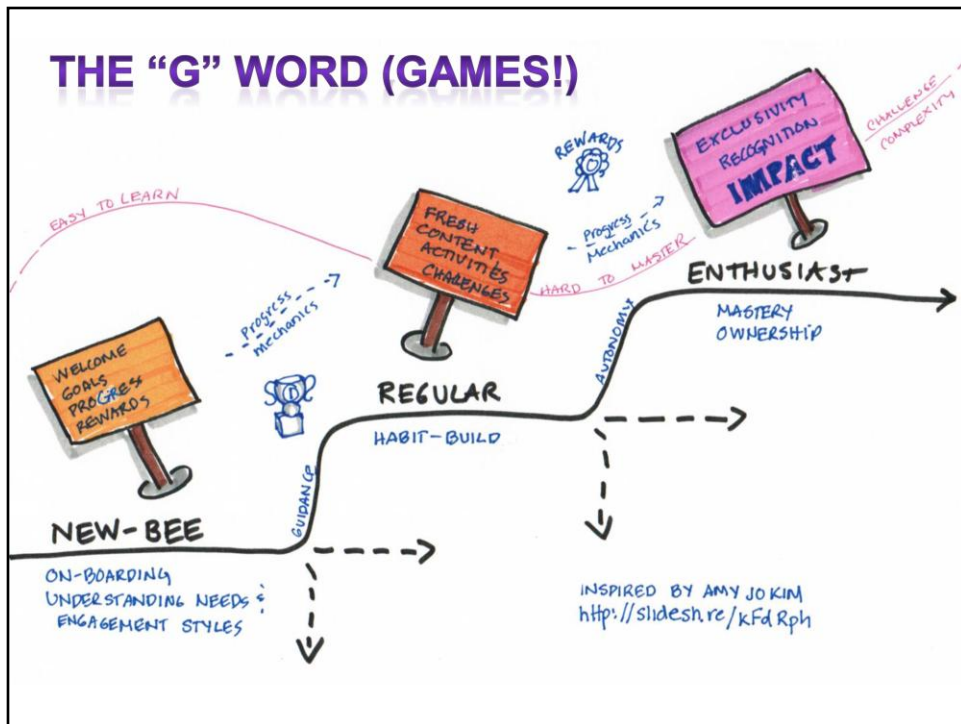
We can even approach community faciltiation from a gaming perspective. I adapted this from Amy Jo Kim's work on game dynamics to think about how a member "advances" deeper into a community over time.

http://www.slideshare.net/amyjokim/smart-gamification-social-game-design-for-a-connected-world?

Where we think about our choices...

ENGAGEMENT STRATEGY ACROSS LIFECYCLES
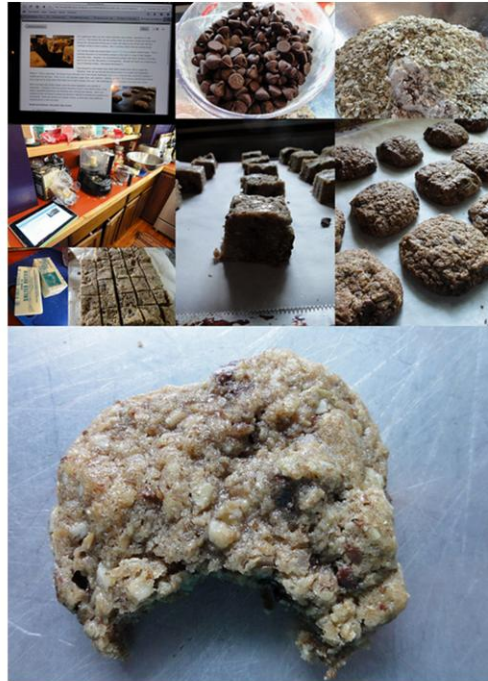
When we look at the trajectories of some existing communities, we see a couple of useful patterns around STRATEGY.

Legitimate Peripheral Participation
(a.k.a. "lurking)

See http://christytucker.wordpress.com/2011/07/18/lurking-or-legitimate-peripheral-participation/

The Truth About Online Communities

— 95% just want quick tips and tricks

— 5% are conversing and active

http://www.articulate.com/rapid-elearning/heres-where-the-e-learning-community-provides-practical-value/

I threw this slide in to be slightly provocative… We know: People Are Busy: what they do on the community has to matter to them. There is also the "Pareto" prin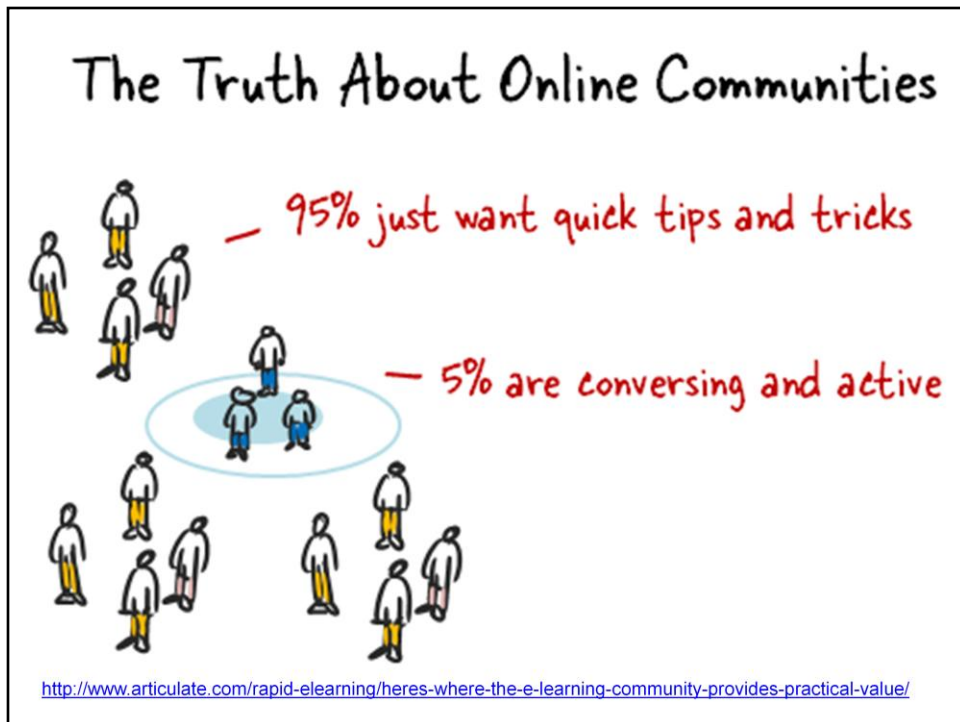ciple which states that 10% of a community represents 90% of the community activity. Actually, in very large, open communities, that may be as much as 99%/1%! But lets look at this a bit more critically.

1. Should this be the case every time or are there times when we want to intentionally increase the participation ratio? I'd say for team work, tasks, short term events we should and can increase that percentage.

2. Should we worry about the others who don't participate, the so called lurkers? Are they a cost? I'd suggest that if your lurkers are reading, learning and taking ideas away into their work, you have a strong and important PERIPHERY. However, it is hard to measure the effectiveness of that periphery short of contacting and asking people. But we know they are valuable.

Practice
…the action of
social learning
part 2 - activities

Activities (clarity, iterative, good questions, showing work/product, scaling conversation, linking activities to learning goals, debriefs.)\

Spidergram

Real people getting real help & doing real work

What we care about

Who cares about it

What we **do together** about it

- Support (Q&A, help)
- Affinity (relational, identity)
- Ideas (innovation, thinking together)
- Task (getting something specific done together)
- Content (create, use share)

Moving past the WHO and on to the third leg -- finally, there is the action – what we do together around the thing we care about with each other. A nice shorthand is to think of this as the set of activities that support our purpose. This can be a broad range of things like web meetings, web based discussions, blogging together, writing something together on a wiki, teaching each other things, sharing case studies and stories, mentoring each other, inviting in new members, taking on specific roles, sharing great content. It is the stuff we do together.

When designing, managing and facilitating, these activities are the building blocks of our work. We can see them across time as a calendar of activities. New communities really need to focus on specific, structured activities to get people engaged and invested. Informal or well established communities may generate much of this on their own. In fact, that is a great sign of success when the community becomes a hive of self-organized activity. There is an old saying, "if you build it they will come." Well, they may drop by for a visit, but if there is nothing happening, they won't stay and you will have an empty shell.

There is a second layer of "what we do together" that is also important – how people apply what they learn out in the world, out in their work. In the end, your communities are not there just to be there. They exist to support change in the world. So activities that help members share and reflect on how they apply what they learn can be crucial.

Let's look at a few examples.

- ❑ What things do learners do offline already that you might do online? What do they **want/need**?
  ("Start where people are now.")
  - ❑ Ask & answer questions
  - ❑ Share resources
  - ❑ Share case stories
  - ❑ Do "peer assists"
  - ❑ Create things together
  - ❑ Practice new skills together
  - ❑ Learn about each other
- ❑ What is the "rhythm" of these activities?
- ❑ What size of group are involved?
- ❑ How are the activities supported or facilitated?

What we care about

Who cares about it

What we **do together** about it

Here are some other examples of activities.

Rhythm and do's

- Weekly patterns
- Time cycles and "chunking"
- Line of sight
- Surprises
- Guilt and other friendly pressure

Complexity and Safe-Fail Experiments *(Snowden)*

http://www.flickr.com/photos/josefdunne/4319306255/sizes/z/in/photostream/

http://www.flickr.com/photos/josefdunne/4319306255/sizes/z/in/photostream/
http://www.cognitive-edge.com/blogs/dave/2007/11/safefail_probes.php

Read Dave's article on Safe Fail – this is a great way to explore areas where you are not certain of the outcome, where you or your institution sense some risk or vulnerabilities or where things are really complex.
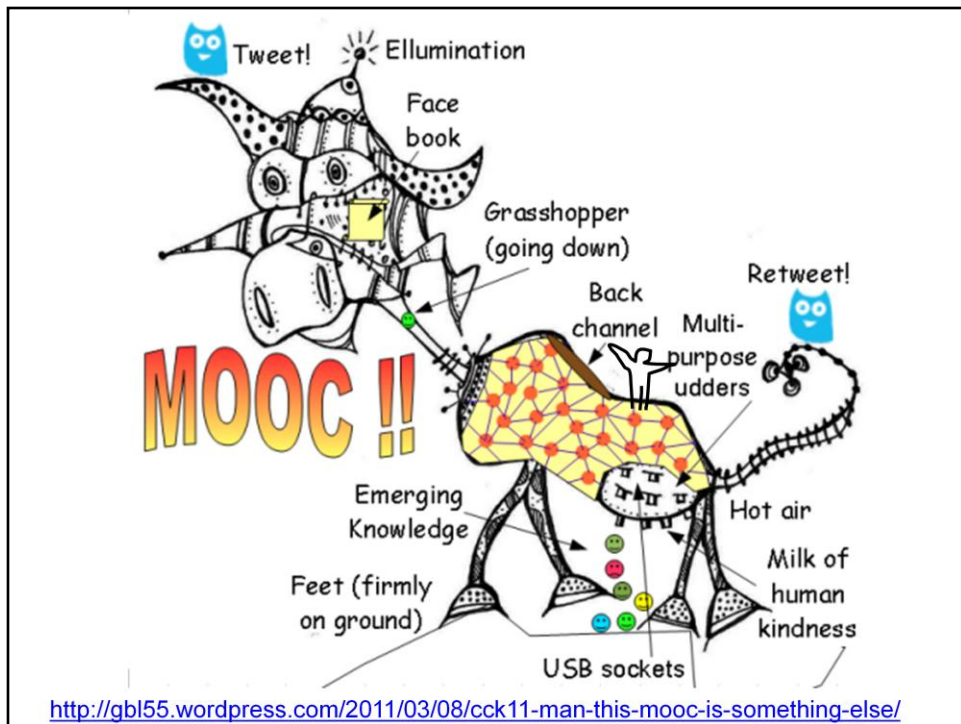
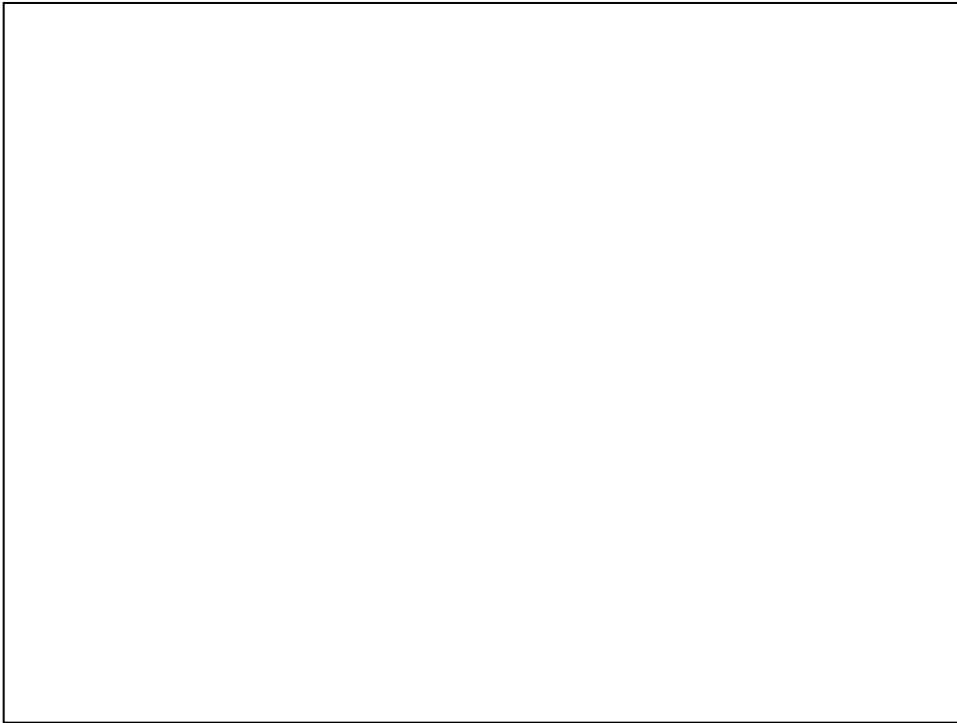There are many forms that include this perspective on connecting. CoPs

Connecting domains

Safe fail experimentation

Open Ed

PBL

Occupy hand signals

In our research of CoPs we noticed 9 general patterns of activities that characterized a community's orientation. Most had a mix, but some were more prominent in every case. We can organize these into a little measuring tool called a spider gram as a way to assess, and plan for our communities.

Image: Wenger, White and Smith, Digital Habitats: stewarding technology for communities, 2009

See http://www.fullcirc.com/2009/03/31/digital-habitats-community-orientation-spidergram-activity/ for the full Spidergram activity pack
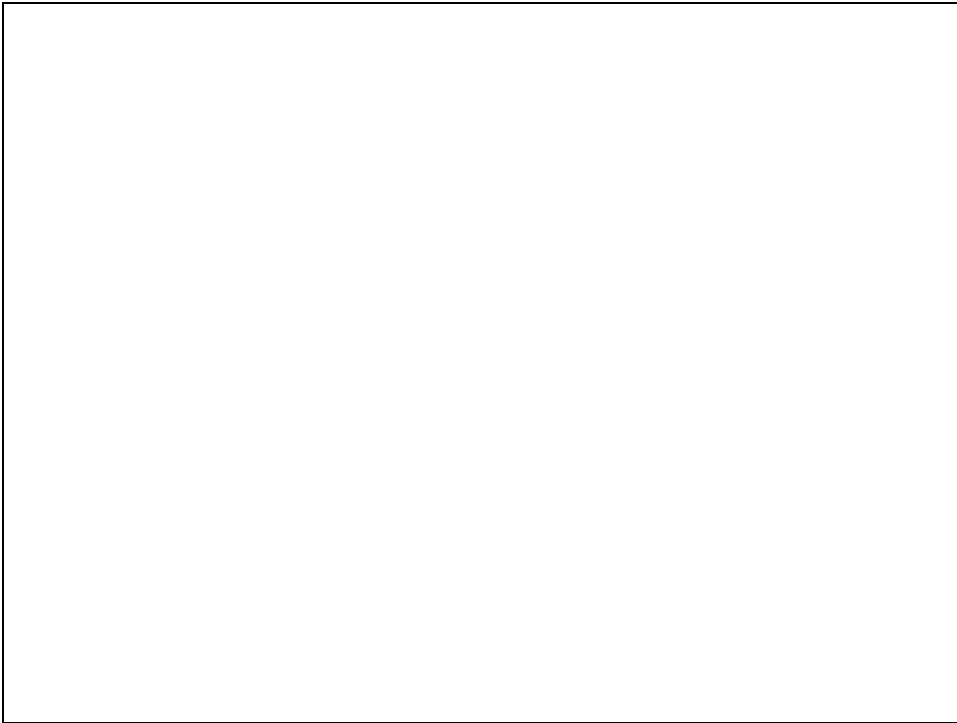
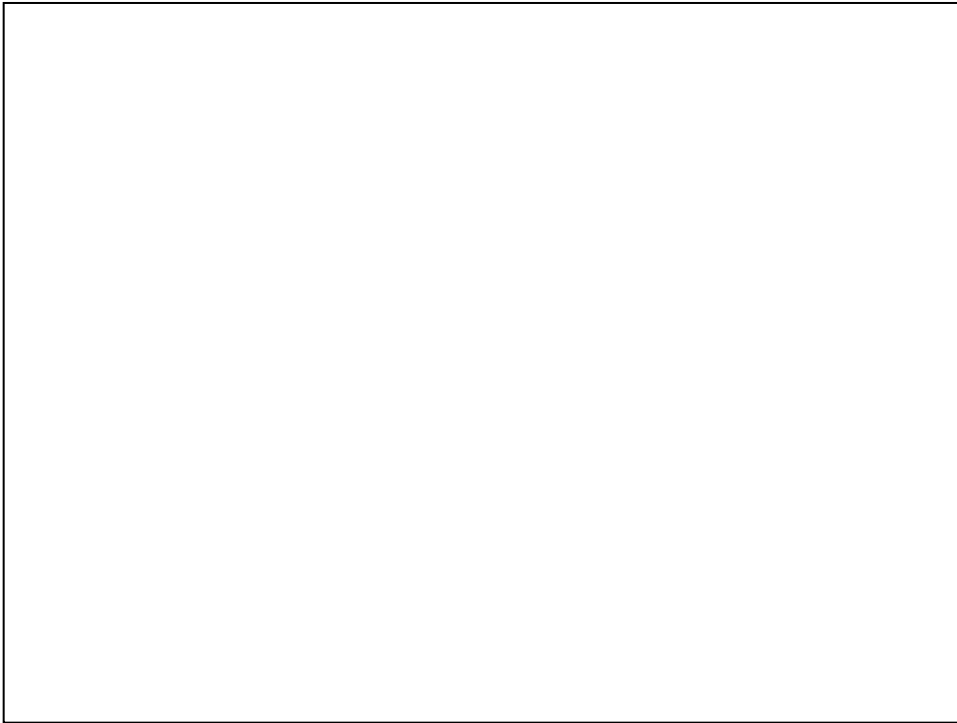Here are the main activity orientations we found in our research.

Here is an example of a spidergram of one of my main professional communities, Knowledge Management for Development or KM4Dev (http://www.km4dev.org). KM4Dev is a global network of practitioners interested in knowledge management and knowledge sharing in international development. Over 1200 members are subscribed to the email list which had it's origins in July 2000. Another 1100 are registered on a NING site. It is both a well established but loosely bounded network that interacts primarily online, with once a year meetings that a small subset attend.
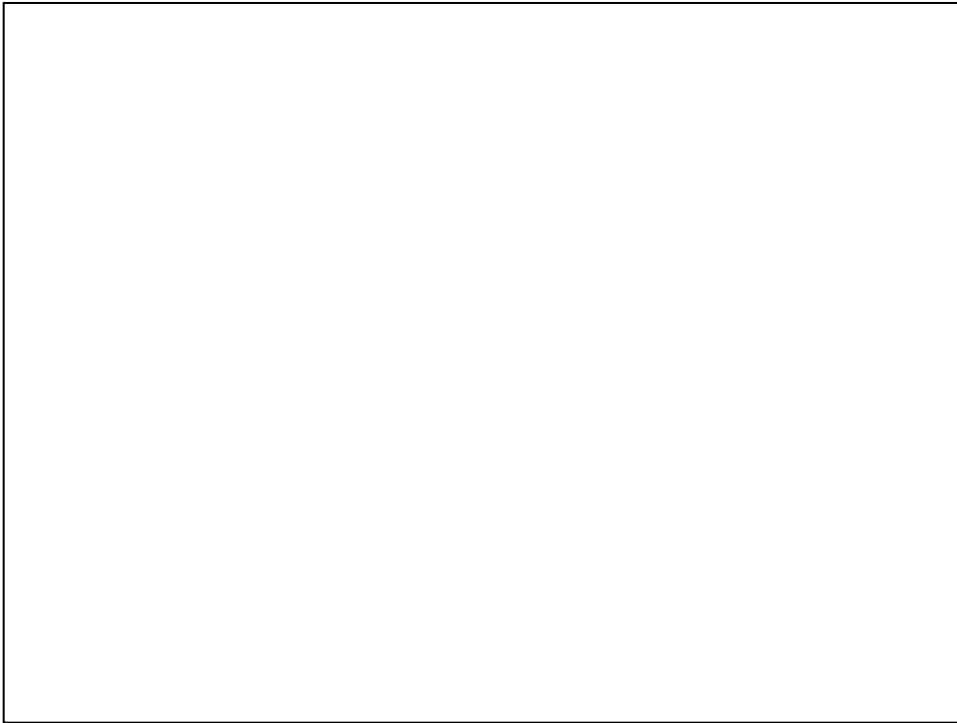
Here is an example drawn from the book "Red-Tails in Love: Pale Male's Story -- A True Wildlife Drama in Central Park" by Marie Winn. Vintage Books, 2005

The book tells of a community of bird watchers in Central Park and exquisitely describes their practices. This is a predominantly face to face group that might use some social media, but not as their central way of interacting. They are a large, diverse group, but tightly geographically bound to Central Park in New York City. They might fill this spidergram differently than I might, but this is just an example!

Image: Wenger, White and Smith, 2007
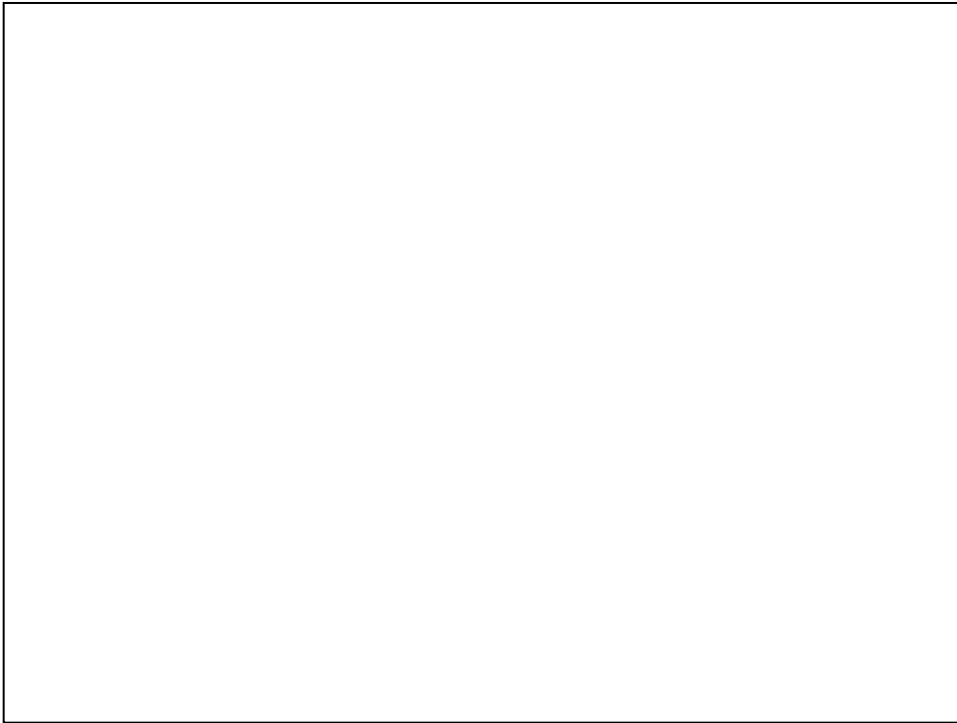
Here the KM4Dev spidergram is compared to a completely unrelated community of birdwatchers, just for fun. You can see how different groups have different priorities. It is a bit like a community activity "finger print."

The next step is to think about what facilitation approaches tools support the different orientations.
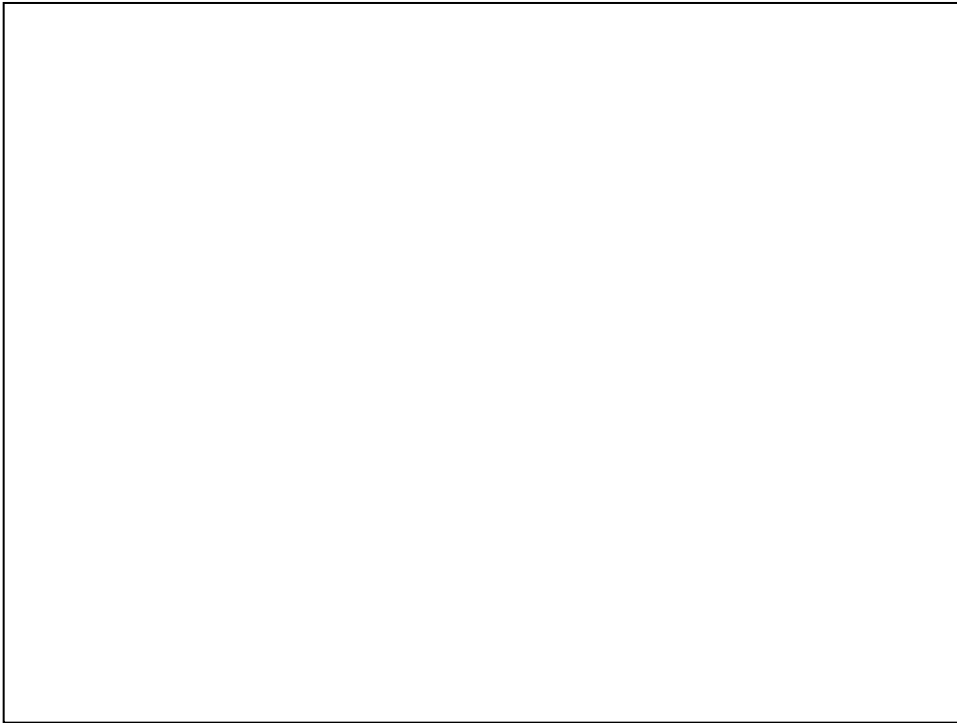
When reviewing the some communities, I noticed some encouraged people to contribute content. In the strongest communities, people got a lot of feedback on their contributions, which was terrific. But in some cases, people received no feedback or comments on their content. I notice that without feedback – even a simple thank you, people stop contributing. Just a little tip!
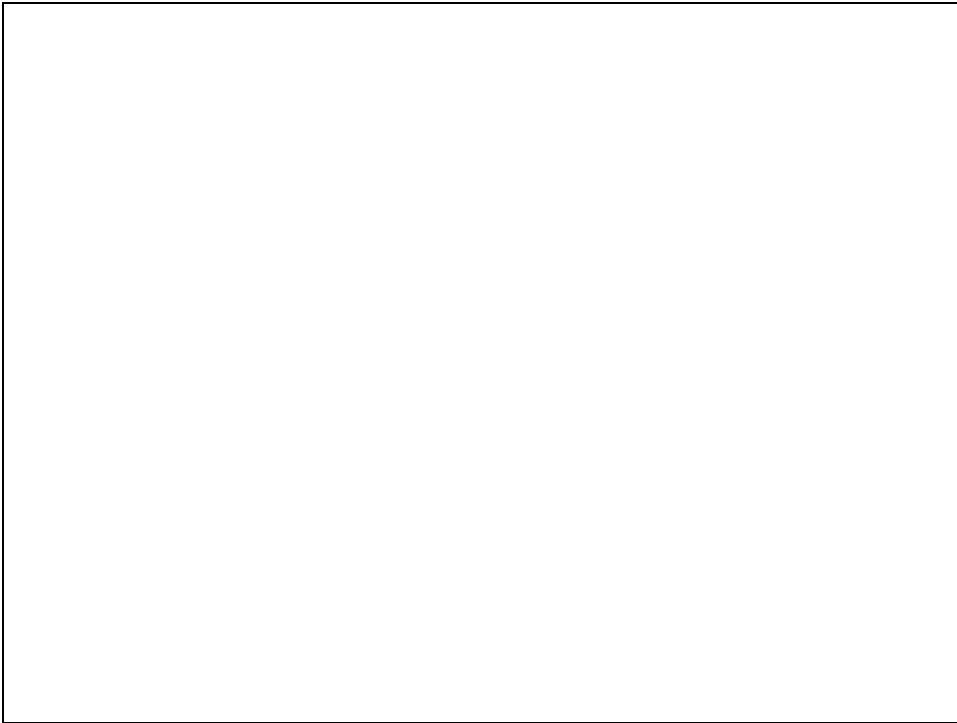
What was interesting was that these orientations had implications beyond communities. They could be a useful analysis, diagnostic and measurement tool for the application of social media to an organization's work.
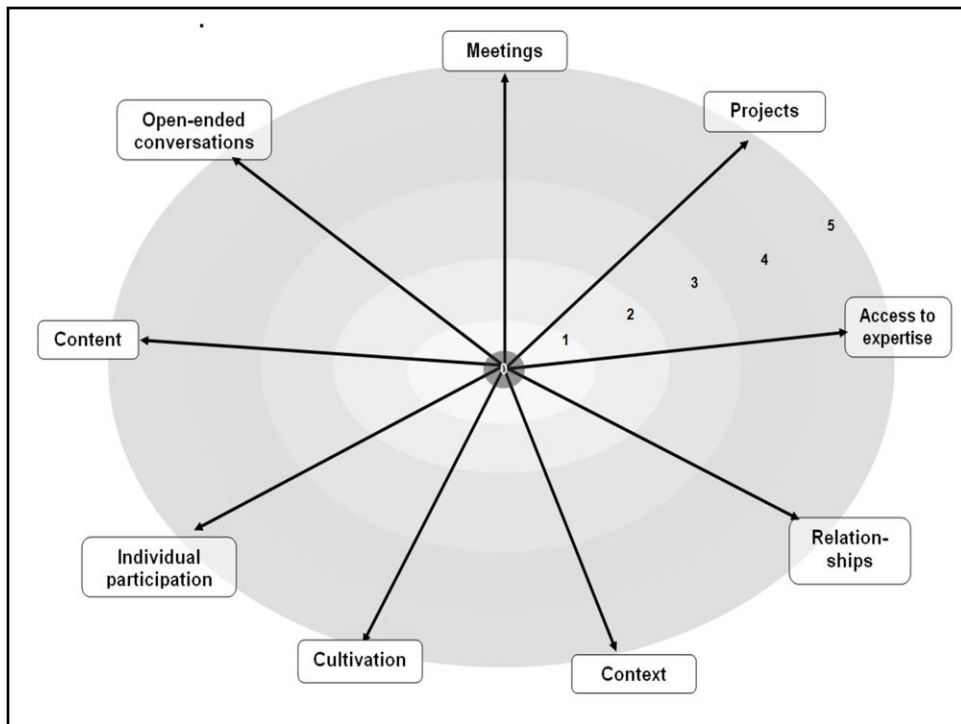
Why don't you try doing a spidergram for your community, then discuss it with a colleague. Notice you may both see the community slightly differently. This is common!

Community Name:

Meetings

Open-ended conversations

Projects

Put a mark on the arrow to indicate how important a particular orientation is to your community. The more important the orientation, the further out on the arrow the dot should be placed. Then draw a line between the dots.

Access to expertise

Individual participation

Relation-ships

Cultivation

Context

Base material from:
Digital Habitats: Stewarding technology for communities
© 2009 Wenger, White, and Smith

1 2 3 4 5

Facilitation
…your gig!

While activities are the heartbeat of the community, another important set of practices is how we facilitate to engage and activate members.

Classical group facilitation has a clear role in facilitating online communities. We can and should use our offline knowledge of group facilitation in many contexts online.

 Working, learning and interacting online all reflect a continuum of processes, tools and experiences. In order to make it a bit easier to talk about, Michelle Moussou and I developed a model to talk about four main frameworks and 9 processes. Somewhat of an artificial construct – but it gives you something to "hang on to" to initiate discussions of how to facilitate online interaction.

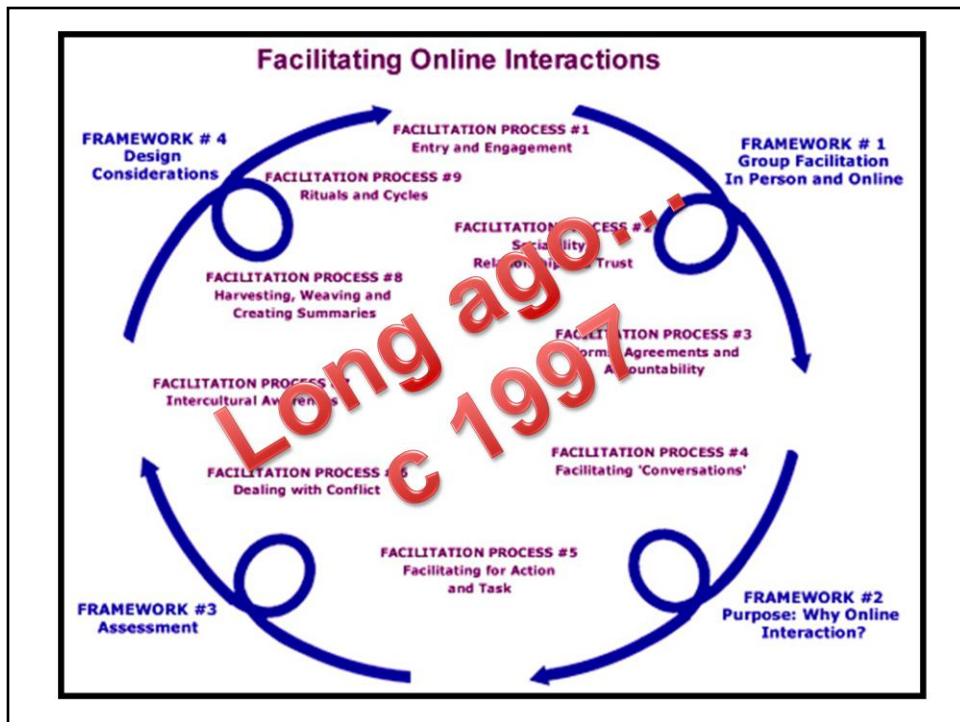The inside is reflective of the content we are offering – how to facilitate online. But the frameworks on the outer ring may have broader applicability to learning environments and the inner processes can reflect the online learning experience. This is particularly true if you adopt a more facilitative vs. "teaching" approach. For example, if you want to use group projects as a learning tool, the issues of sociability, relationship and trust are worth exploring as groundwork to enable group work. Make sense?

Here is a key idea to keep in mind: There is always a tension between control and emergence. Between what we intend as facilitators/teachers and what the participant brings to the table. Between individual and group. Between what works for one and what works OK for the larger group (learning styles, etc.). Between what we know and what we don't know. Between the comfort of what we know, and the opportunity of what we don't!

Participation
Practices

- Open Space
  (http://www.openspaceworld.org)
- World Café
  (http://www.theworldcafe.org)
- Appreciative Inquiry
- Positive Deviance
- Storytelling
- …and many, many more
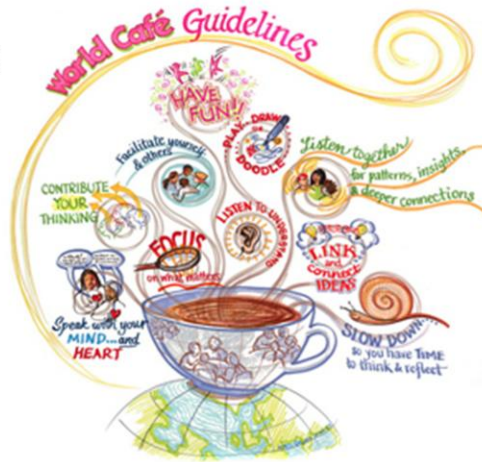
We can learn from many inspiring sources

ODI:
6 Network Functions

- Filters
- Amplifiers
- Convenors
- Facilitators
- Investors
- Community builders

http://www.odi.org.uk/Rapid/Projects/PPA0103/Functions.html

Classical facilitation also has a key assumption: there is a defined group of people. But with online opportunities, we are often working with much less defined and affiliated groups of people, asking us to consider facilitation from a network perspective. In open networks, people are less apt to build shared agreements, and conform to them. Power is distributed so people can skip around anything they don't like, making it difficult to create a fully shared experience. If this is the reality, then we need to use the strengths of the open context, rather than let it be a barrier. ODI and many other organizations have been looking at how to effectively use networks.

•Value of networks: Enrique Mendazibal ODI working paper
http://www.odi.org.uk/Rapid/Projects/PPA0103/Functions.html

In the MOOC experience I mentioned, I also talked about the Social Artist.
http://www.michelemmartin.com/thebambooprojectblog/2011/11/learning-careers-and-social-artistry.html amplifies on a post I had written earlier for the #Change11 MOOC http://www.fullcirc.com/2011/11/08/reflecting-on-socialartists-and-change11/ which gives some good background. There are two definitions, on from Etienne Wenger and one from Jean Houston. Wenger's is in relationship to learning (a social artist is a person "enabling social learning spaces"), Houston's is broader but the resonate with each other.

Valerie did an AMAZING recap of the week here: http://bit.ly/sD3A0V watch it – fabulous!

Here are a few more blog posts from the Change11 week on Social Artistry. See also the twitter hashtag #socialartist http://www.tweetdoc.org/View/28168/Tweets-from-change11-about-socialartists

http://www.transgnosis.com/change11-social-artist-and-collectiveintelligence/
http://www.fullcirc.com/2011/11/08/reflecting-on-socialartists-and-change11/

https://worklearn.wordpress.com/2011/11/02/social-artists-ends-up-being-about-mooc-design-change11-socialartist/

http://suifaijohnmak.wordpress.com/2011/11/04/change11-social-artist-and-collective-intelligence/

http://juandomingofarnos.wordpress.com/2011/11/04/change11-social-artist-and-collective%C2%A0intelligence/

http://heli.edublogs.org/2011/11/07/884/

http://silenceandvoice.com/2011/11/04/i-am-a-nancy-white-groupie/

http://silenceandvoice.com/2011/11/06/glass-gandhi-ows-and-social-artistry/ (added Nov 10)

http://www.scoop.it/t/digital-delights/p/628320308/change11-mooc-session-october-31

http://suifaijohnmak.wordpress.com/2011/11/04/change11-change-happiness-and-social-artistry/

http://suifaijohnmak.wordpress.com/2011/11/05/change11-patterns-fractals-and-conversation/ (should I have talked about network weavers?
Seehttp://www.bethkanter.org/network-mindset/)
Finding social artists everywhere http://virtuallyfoolproof.com/?p=686

http://coachcarole.wordpress.com/2011/11/05/change11-listening-to-nancy-socialartist/

The Queen Has No Clothes http://edtech-insights.blogspot.com/2011/11/social-artist-doubts-process-and-feel.html _but see also http://edtech-insights.blogspot.com/2011/10/have-processstructure-but-dont-kill.html "We will try a Technology for Learning Forum (T4L-Forum) to develop the pedagogy necessary, working with enthusiasts, wannabes and even perhaps skeptics, but always asking "where is the learning in this"."

http://serenaturri.wordpress.com/2011/11/06/change11-triangolare-tessere-e-connettere-il-nostro-apprendimento/#comments (Added Nov9)

https://connectiv.wordpress.com/2011/11/01/change11-socialartist-why-small-things-matter/#comments (added Nov 9)

http://gbl55.wordpress.com/2011/11/03/change11-how-now-sweet-cow-the-social-artist-who-disrupted-my-mooc-learning/ (added Nov 10 and wonderfully funny and spot on!)

http://asaginu.com/blog/social-artistry-culture/ (added Nov 10)

https://jennymackness.wordpress.com/2011/11/03/the-power-of-passion-for-change / (added Nov 10)
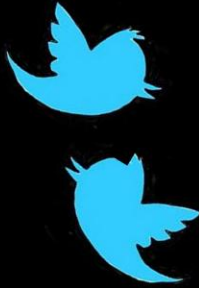
https://jennymackness.wordpress.com/2011/11/05/social-artistry%e2%80%a6a-new-idea / (added Nov 10)

https://connectiv.wordpress.com/2011/11/10/cause-function-intention-change11-accident-coincidence-interpretation/ (added nov 10)

Image Credit: https://www.facebook.com/photo.php?fbid=10150473672076145&set=a.64231186144.83513.709226144&type=1&theater

Social Artists
a la Etienne Wenger

ALL POSTS

Social reporters (and anyone else) as social artists

By David Wilcox · December 14, 2008 · Post a comment

I've come away from the Powering a New Future conference in Lisbon with three interlocking reflections on developing the concept and practice of social reporting - and a new conclusion about what it means to be a social reporter.

My conclusion, inspired by Etienne Wenger - above - is that social reporters can aspire to be "social artists" who help create social learning spaces where people can work together on social issues. It's something anyone can do, with the right attitude and some skills, but I think social reporters should definitely make it a key part of their work.

If that idea holds up it could be a useful contribution to projects including Open2gether, OpenRSA and maybe RSA Networks. Here's the reflections that led me to the idea, then how it may apply to networks.

http://www.flickr.com/photos/newzgirl/3175562284/
http://socialreporter.com/?p=474

"knowing how to use who you are as a vehicle for opening spaces for learning. It's about being able to use who I am to take my community to a new level of learning and performance…space for becoming learning citizens" – Etienne Wenger

". . . the art of enhancing human capacities in the light of social complexity. It seeks to bring new ways of thinking, being and doing to social challenges in the world.
…Social Artists are leaders in many fields who bring the same order of passion and skill that an artist brings to his or her art form, to the canvas of our social reality. - Jean Houston

http://socialreporter.com/?p=474

http://www.jeanhouston.org/Social-Artistry/social-artistry.html

ROLE AND ROI OF FACILITATION & MGMT

Tom Humbarger is one of the few people who has done an analysis of community activity with and without a community manager and the activity drop off, while not a cliff, slows significantly in a fairly short amount of time.

http://community-roundtable.com/2010/01/the-value-of-community-management/
http://tomhumbarger.wordpress.com/2009/01/13/the-importance-of-active-community-management-proved-with-real-data/

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http://community-roundtable.com/2010/01/the-value-of-community-management/
http://tomhumbarger.wordpress.com/2009/01/13/the-importance-of-active-community-management-proved-with-real-data/

I came across this blog post and it really caught my eye:

Tom wrote:
"I think most community experts would agree that active community management and ongoing strategy are vital to a community's health. However, I don't know if anyone has been able to fully quantify the impact using actual community metrics.

Until now – when I decided to analyze some of the 2008 data for my former community during the period of active management and the period of passive management.

I was the community manager for a professional community from January 2007 through July 2008. During that time, the community grew from zero to 4,000 members. We were rigorous with the tracking of metrics and updated community analytics weekly through a combination of our platform reports and Google Analytics. I was laid off in July due to financial hardship of the community sponsor, but the community doors have remained open albeit with no community management or minimal upkeep.

During the time of my involvement, active community management and consisted of:

delivery of bi-weekly email update newsletters

production of monthly webcasts

active blog posting and blogger outreach

uploading of fresh content each week

continual promotion of the community in various forums through guerilla marketing

ongoing brainstorming and strategizing with respect to improving the community experience

priming of discussion forums, and

ongoing communications with individual community members

It's interesting to discover that a neglected community will indeed continue to function without a dedicated community manager. However, the results are lackluster and the picture are not 'pretty'.

For example, this is a screen shot from Google Analytics graphing the number of weekly visits to the community from 1/1/2008 through 12/31/08:

Google Analytics - 1/1/2008 to 12/31/2008

Additional details from the metrics include:

Membership growth slows significantly – Community membership grew 62% from January to July at a average clip of 55 new members per week. From July to December, the membership only grew 13% at an average clip of 20 members per week. This is a fall-off of more than 63% on a week to week basis.

Number of visits drop 60% - The number of visits from January through July averaged more than 1,300 per week. For the second half of the year, average visits dropped nearly 60% to an average of 522 per week.

Number of pages viewed per visit drops 22% - Not only did the number of visits drop, the number of pages per visit also decreased by 22% with the average pages per visit going from 3.76 to 2.95.

Time on site decreases by 33% – Driven by the fewer page views, the time on site in minutes during active management was 3:38 vs. 2:37 after July which is a 1:19 or 33% decrease.

Fresh activity on the site since August has been pretty nonexistant as well – just 10 new blog posts, 4 new file uploads, and less than 25 discussion forum questions or comments have been posted. For some interesting reason, the activity on the related LinkedIn group has picked up and included 15 new discussions in just the last week. This definitely is worth taking a deeper look in a separate blog post.

So what does this mean? Clearly, the analysis proves that active management contributes significantly to the health of a professional community. And that it is ultimately important to the success of a community."

Rational for Your Boss: Tom's Analysis

- **Membership growth slows significantly** – Community membership grew 62% from January to July at a average clip of 55 new members per week. From July to December, the membership only grew 13% at an average clip of 20 members per week. This is a fall-off of more than 63% on a week to week basis.

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Look at Tom's analysis. If your manager doesn't see the value of facilitation, share these statistics!

Glenda Eoyang's Advice

- **Observe.** Don't waste a good surprise. Pause and wonder when something unexpected arises. It may be the weak signal foreshadowing something important to come.

- **Connect.** Nothing co-evolves in isolation. The key is connecting in inquiry with the environment, with current and historical patterns, and with other thoughtful people.

- **Question.** Our assumptions blind us to the world around and lock us into our long-held problems and their failed solutions. A good question can break through the expected to discover the possible.

- **Try it out.** Of course expectations based on past experience will make us question anything we haven't experienced. To see something new, we really have to see it. Try a new idea out, see what happens, adjust and try again. We call this adaptive action. Reward thoughtful risk taking.

http://bit.ly/IPyXxJ

http://www.hsdinstitute.org/learn-more/read-the-latest/attractors.html

There are a variety of facilitation and community management models. Here is one of those simple set of useful "rules of thumb" or heuristics that are tried and true.

1. **Sponsor from top**
   Ensure that sufficient resources are available to create and sustain knowledge networks.

2. **Ensure right blend of membership**
   Where possible, membership should be at least partly external.

3. **Support demand**
   Create networks as a response to a real need, rather than in a top-down way.

4. **Develop a business case**
   Organize consultations with potential network members to establish an appropriate business case for the network.

5. **Facilitate continuously**
   Provide continuous facilitation for helping and supporting network members to work together and achieve their goals.

6. **Select appropriate methodologies and technologies**
   One size does not fit all. Different types of networks need different methodologies and technologies.

7. **Recognize staff time**
   Staff members should be recognized for their contribution to knowledge networks.

8. **Promote**
   Sponsors and facilitators should share their experiences and promote knowledge networks.

9. **Monitor and evaluate**
   There should be on-going monitoring and evaluation of knowledge networks.

FAO's
"Nine Keys to a Successful
Thematic Knowledge Networks

The Food and Agricultural Organization of the UN has developed this set of approaches for working with their thematic knowledge networks.

Community Management is the Discipline of Ensuring Productive Communities

Responsibilities

- Define scope, ideal outcomes, and boundaries
- Ensure participants receive more value then they contribute
- Promote, encourage, and reward productive behaviors
- Discourage and limit destructive behaviors
- Facilitate constructive disagreement and conflict
- Advocate for the community and its members
- Monitor, measure, and report
- Marshal internal advocates, resources, & support
- Manage tools and member experience

The Community Roundtable offers these:

Community management is, at a fundamental level, a job for generalists who can orchestrate the right resources, skills, tone, and talent that establishes the environment in which community will take hold. Relevant and fun.

A Sampling of Tasks

Visible

- Managing content (publishing, curating, tagging)
  - Updates
  - Blog posts
  - eBooks/whitepapers
  - Pictures
  - Videos
  - Podcasts
- Managing events
- Welcoming new members
- Participating judiciously in conversations
- Reaching out to 3rd party influencers, partners, media
- Communicating changes to policies, tools, programming, etc

Behind the Scenes

- Back-channeling with members to encourage participation
- Building relationships with key members
- Taking issues offline
- Working with internal advocates to plan mutually beneficial programming
- Planning programming/campaign calendar
- Collaborating internally
- Managing technology issues
- Communicating value and benefits of community internally
- Measuring and monitoring progress

… and some sample tasks.
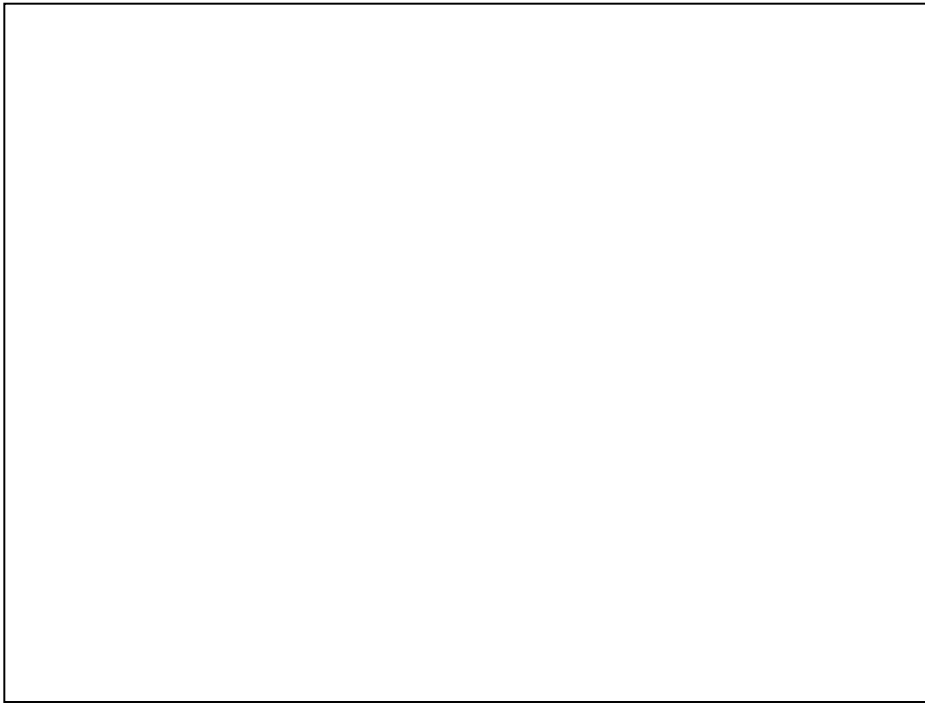
When we think about what engages people, having a small, meaningful conversation with someone

The first is to simply introduce them on the website or via email and then leave it at that. If they wa

The second is to set up a conversation – Skype, phone, face to face and then people at least are ass

The third level is to set up a shared activity – hopefully valuable and related to your community. Th

This is just one example of simple but powerful facilitation activities that can help deepen member
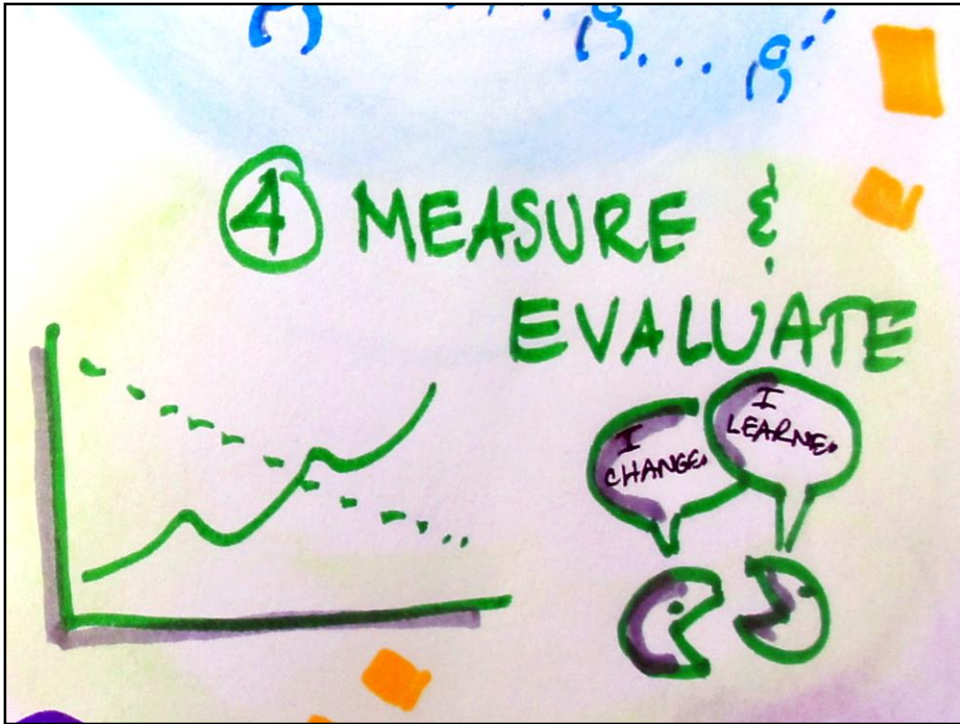
Hat tip for this: June Holley
See the work of June Holley http://www.networkweaver.blogspot.com/

Reflection & Evaluation

…how do we know we are succeeding?

Interestingly we never got around to talking about evaluation in any of the workshops. What does that tell us? ;-)

"What does a great (learning) community look like?"

How do you know when things are going well? What are your quantitative and qualitative measures? How do you engage learners in the evaluation? How much do they "own" it? Compared to meeting administrative requirements?

We can use these lenses for evaluation!
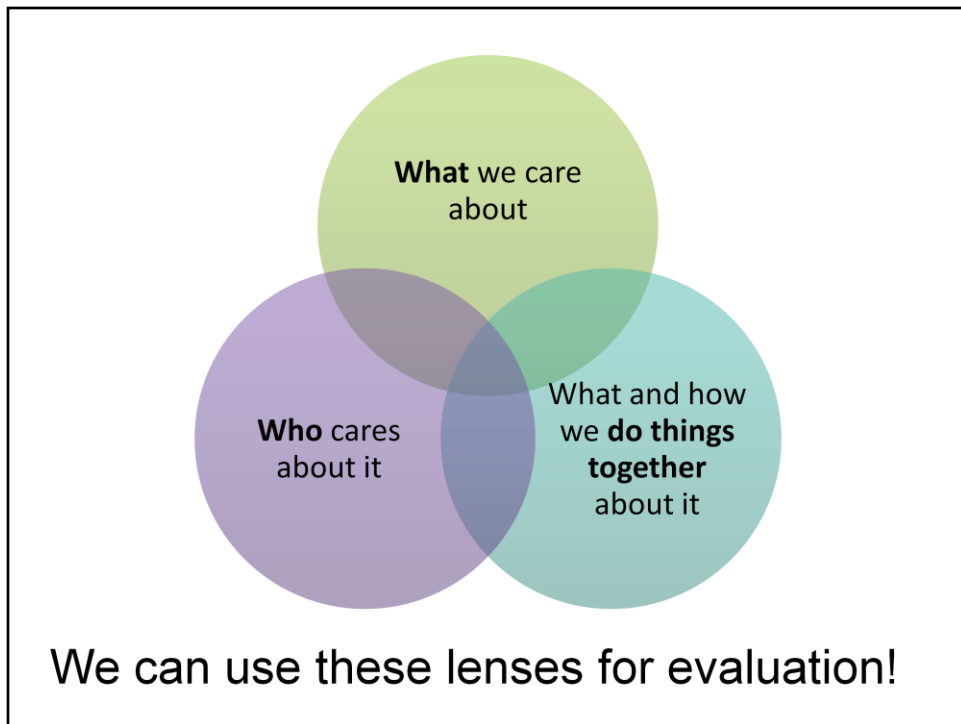
Westarted with the three legs of the stool from a design and deployment perspectives. But they can be useful for evaluation as well.

The key here is to start thinking about this from the start – not wait until you are a year in and they ask, "how are we doing?" It helps to have a framework and a language as we design, execute and evaluate our communities.

MEASURE & EVALUATE

What we measure

- Web statistics
- Satisfaction levels
- Activity levels
- Application
- Relationship
- Growth and change
- "Value creation"
- Impact & other changes

How we measure

- Analytics (i.e. Google)
- Social media dashboards
- Surveys
- Conversational methods
- Case studies
- Story collection
- Content review
- Social Network Analysis

Here are some examples of WHAT we measure, and HOW we measure them. Notice there is a blend of both quantitative and qualitative measures. There are also some particular community evaluation rubrics you can consider. Let's look at a few of these.
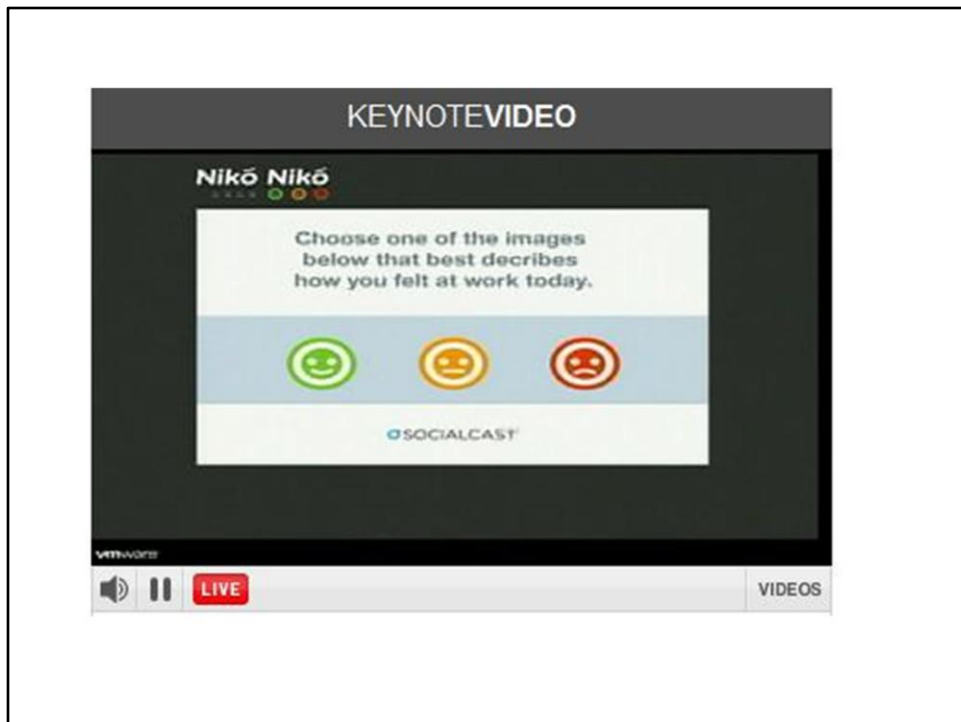
A company that makes teamwork tools has built little smiley faces into all elements of their software and report that it helps them have a better idea of how their distributed team mates are doing. This is often called "social gesture." Think about the "like" button on Facebook or the +1 on Google.

ROI Models

Reach	Frequency & Traffic	Influence	Conversation & Transaction	Sustainability
How far does your message reach?	Quantity factors	What is the reach of a conversation once started? And to what influence?	What is the call-to-action and is it working?	Is it just one transaction or are people becoming clients and ambassadors?
• Links generated by messages • Tweets about your message • People who talk about your message • Acquired new connections	• Visits • Unique visitors • Returning visits	• Discussions about a message / content • Comments about a message / content • Retweets • Quantity of sharing and sending message	• Frequency of click-throughs • Downloads • Sales	• Sustainable member of a community • Loyalty • Frequent coming back visits

Tamar Weinbergs Community ROI approach http://www.socialmediamodels.net/social-media-roi-models-measuring-models-category/tamar-weinbergs-social-media-roi-model/

This model from Tamar Weinberg focuses on return on investment and comes from a perspective of using a broad range of social media.
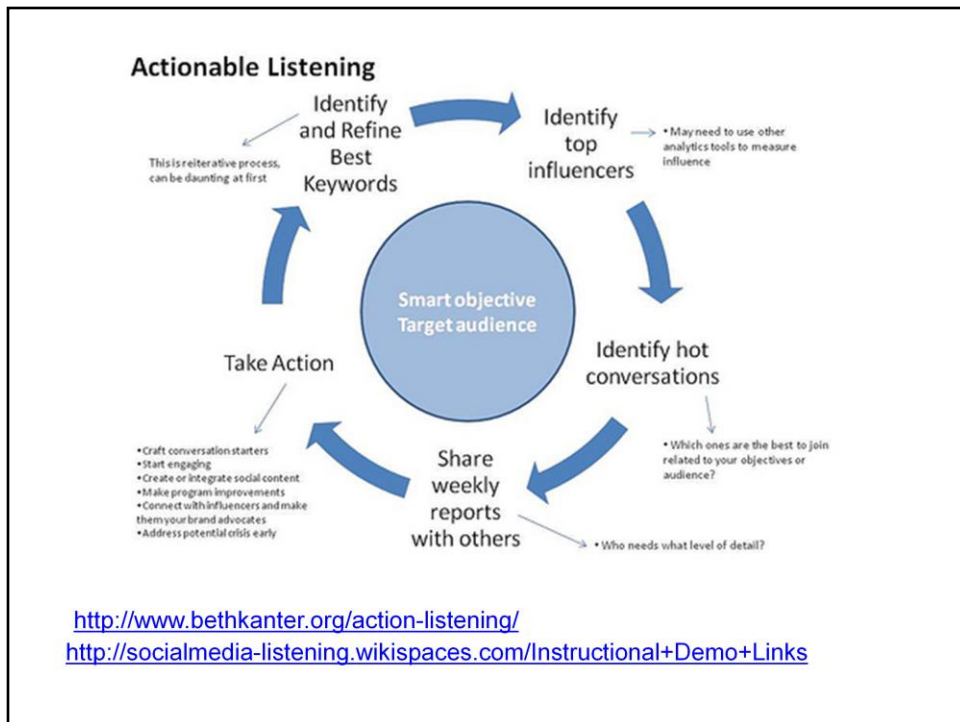
Forrester's Ladder of Engagement (and all the creative variants)

http://www.flickr.com/photos/cambodia4kidsorg/2296887265/
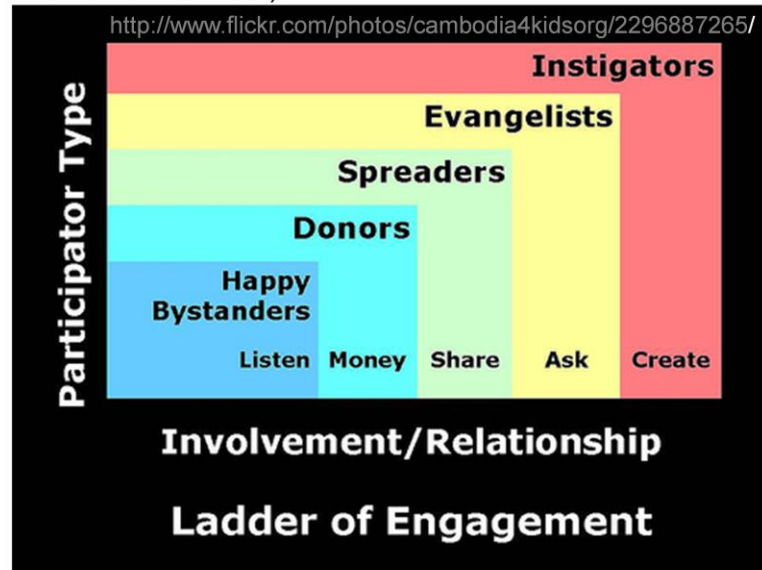
Beth Kanter built on Forester Researcher's "Ladder of Engagement" to look at how participants in her community deepened their engagement and used this as an evaluation rubric.

Beth also reminds us of SMART objectives (Specific, Measurable, Achievable, Realistic, and Time-based objectives) and then thought of them in an iterative fashion as a way to get an ongoing pulse of a community and use that to implement real time responses and facilitation. (See also the CDCs Communities of Practice Evaluation Kit http://www.cdc.gov/phcommunities/resourcekit/evaluate/smart_objectives.html)

Dashboards

Photo: http://www.flickr.com/photos/seenoevil/343753{

(http://www.bethkanter.org/nonprofit-dashboard/)

http://www.flickr.com/photos/seenoevil/343753843/ If you are using a lot of social media, there are "dashboard" tools that help you see the pulse of activity across different media and how they relate to each other. This is particularly helpful for broad, networked initiatives.

Wenger, Trayner & de Laat

Promoting and assessing value creation in communities and networks: a conceptual framework

http://www.social-learning-strategies.com/documents/Wenger_Trayner_DeLaat_Value_creation.pdf

—**Immediate** Value (what happened)

—**Potential** Value (what was produced)

—**Applied** Value (what difference did it make)

—**Realized** Value (impact)

—**Reframing** Value (what's changed?)

Recently, Etienne Wenger, Bev Trayner and Maarten deLaat wrote a terrific paper on measuring value creation in communities and networks. They talk about various levels of value that accrue over time. At the end of their paper, they have a toolkit for doing story telling or narrative processes to measure across these levels qualitatively.
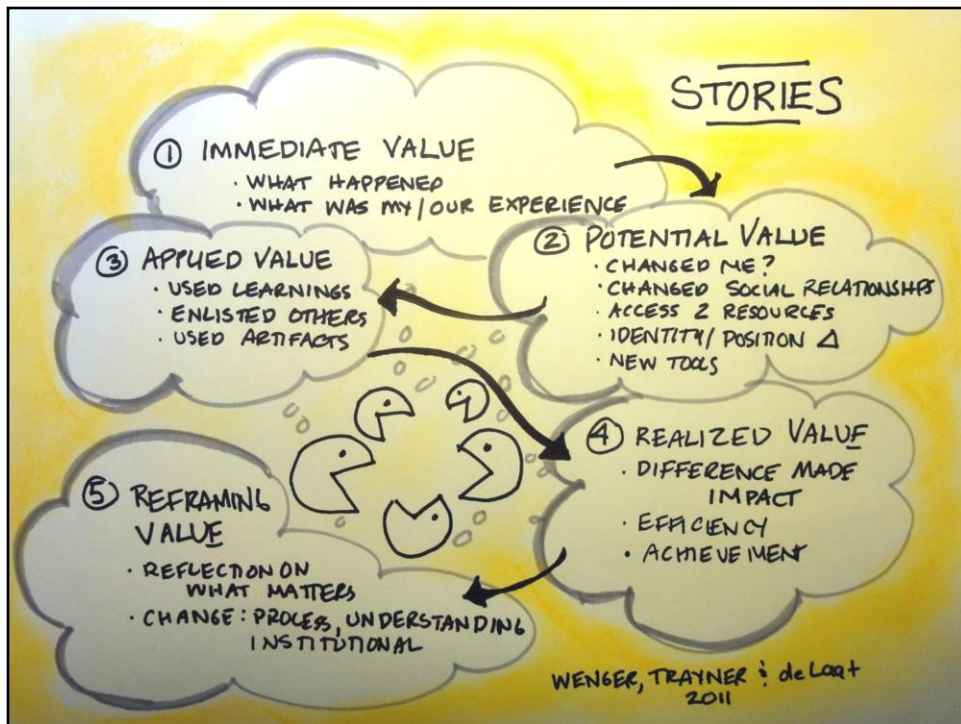
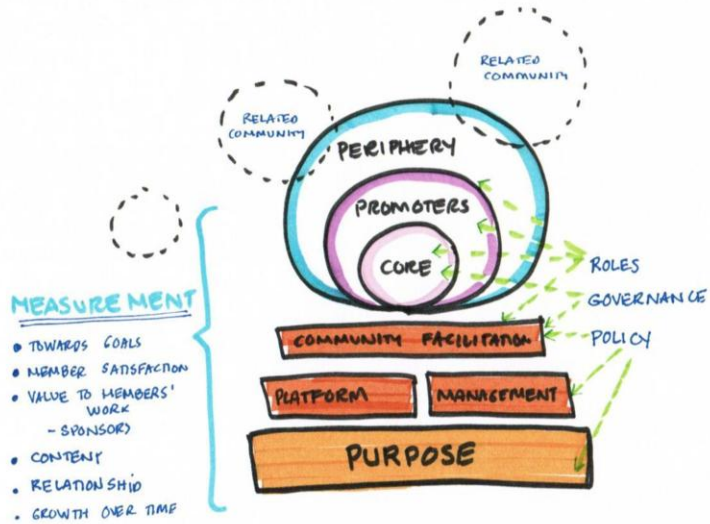Here are a few items from each level to give you a sense of the meaning of the five levels.

Yes, AND
…advancing our practices

At all of the workshops I mentioned how immersing myself a bit in improvisational practices has helped me. Australian educators have a fantastic opportunity to dive into the application of improv in work at the 2012 Applied Improv Down Under event. See http://aindownunder2012.wordpress.com/

http://appliedimprov.ning.com/group/aindownunder2012

See also this article http://chiefexecutive.net/improvisation-may-be-the-key-to-successfully-managing-change-says-mit pointed out by Viv McWaters http://vivmcwaters.com.au/blog/ (a great AU resource, by the way!)

So we need to put it all together. Infrastructure, support, community and measurement. It's a big job. But even bigger is the need for us to find ways to work, learn and be together over time and distance to make a real and lasting impact in development. So it's worth it!

https://onlinefacilitation.wikispaces.com/2011+Australia+Online+Facilitation+Workshops
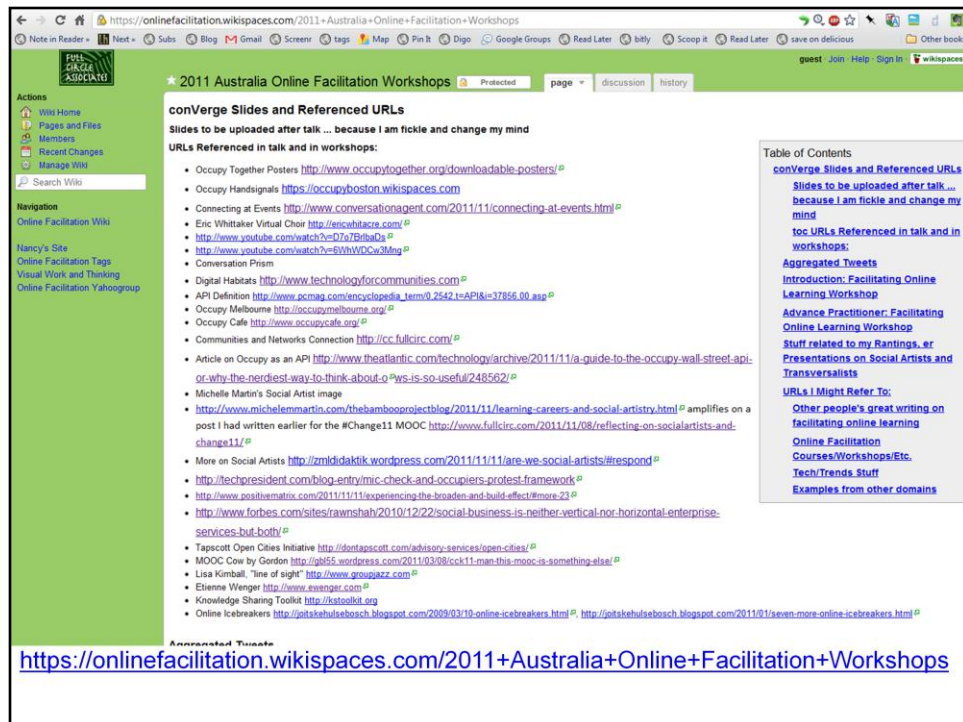
Links to all the things I mentioned in my conVerge11 keynote, plus a place for lots of other links that emerged over our three weeks together in Australia! You can tell, my annotation energy is waning, so I'll stop. Now! Happy Holidays!

December 16, 2011

Next?

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http://onlinefacilitation.wikispaces.com/2011+Australia+Online+Facilitation+Workshops

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