

STRATEGIES TO ENSURE THAT ONLINE FACILITATORS ARE SUCCESSFUL

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Imagine two situations. In one, a federally funded technical assistance project is planning to offer its first Internet-based workshop. The goal is for teachers and administrators from around the country to learn about standards-based instruction by sharing information, discussing resources posted on the Web, and offering each other advice—all online. Project staff members contact Dr. Branch, a respected curriculum leader who has conducted many face-to-face workshops for the project in the past. When they ask her to be the online facilitator, she agrees. Although staff members have confidence in Dr. Branch, they still have questions: How will this online venue differ from the face-to-face workshops they are accustomed to delivering? Will Dr. Branch have the necessary skills to elicit conversation, guide information sharing, and foster reflection in this alternative environment? What can staff members do to support Dr. Branch in her new role?

In the other situation, Dr. Galtes, a professor of education, has just been asked by his dean to teach an online graduate course for the first time. Buoyed by his past success in teaching the course, he agrees to teach it in this new environment. Although he is intrigued by the Internet and relishes the challenge, many questions occur to him: Will he feel as comfortable in the online learning environment as in the classroom? What must he do differently to promote student learning? Where can he go to get the information and support he needs to ensure success for all?

Both situations raise similar issues: What are the distinctive characteristics and challenges of the online learning environment? What knowledge and skills does an online facilitator need to be

successful? What kind of support and guidance do novice facilitators need and who can provide this?

While this paper addresses all three issues, we emphasize the third by addressing the question: What strategies best guide and support online facilitators? So far, the literature on online facilitation has examined what the online facilitator does to promote thinking, conversations, and learning. We have not located articles that have taken the critical step back to consider what it takes to help online facilitators develop the skills they need to do their specialized work. This paper describes ways to provide technical assistance, mentoring, support, and guidance to novice online facilitators.

We anticipate that two different audiences will benefit from our paper: those who are recruiting and hiring online facilitators, and those who are being asked to be online facilitators. While recruiters can prepare themselves to guide facilitators, new facilitators can become advocates for themselves, better equipped to request the help they need in a new domain.

The strategies described in this paper emerged from the Web-based professional development models created and implemented by the National Center to Improve Practice (NCIP). A brief overview of NCIP will provide the context in which the strategies evolved.

THE NATIONAL CENTER TO IMPROVE PRACTICE: AN OVERVIEW

NCIP is a project housed at Education Development Center, Inc. in Newton, Massachusetts, and funded by the U.S. Department of Education, Office of Special Education Programs, from 1992-8. Our mission is two-tiered. First, we want to help teachers, administrators, clinicians, and other practitioners deepen and expand their knowledge about ways in which technology can support students with disabilities. Second, we want these practitioners to apply this knowledge in classrooms to improve educational outcomes for students with disabilities (Corley, 1997; Ethier and Gold, 1997; Remz, 1997; and Zorfass, Remz, and Ethier, 1998).

Professional Development Opportunities

To achieve our goals, we have designed, implemented, and evaluated several interactive online professional development opportunities using telecommunications technology. Beginning in 1992, we used a dial-in service on First Class; in 1995, we switched to the Web environment. Since then, we have been experimenting with HyperNews software to create "centralized" conferencing systems on the Web. This software has allowed us to integrate discussion areas into our Web site, where participants can post messages to one another.

We have used telecommunications to offer three kinds of professional development opportunities—topical discussions, special online “events” featuring guest facilitators, and online workshops. We recruited nationally recognized experts in the field of special education and technology to facilitate the opportunities.

Topical Discussions

In our topical discussions, participants engaged in ongoing, open-ended conversations about the use of assistive and instructional technology for students with disabilities. For example, one topic of interest to participants was determining what skills students needed to make maximal use of word-prediction software and key pal projects that use telecommunications. There was no limit to the number of participants since anyone finding his or her way to our Web site was invited to join the discussion. The primary role of our online facilitators was to make sure that the conversation related to the main topic. Thus, the facilitator needed to be a careful listener who promoted lively and relevant discussion among participants, but did not monopolize the discussion.

Special Events

Participants in special events had an opportunity to converse for three or four weeks with one or more online facilitators who were experts in some aspect of special education and technology. Before we switched to the Web, our special events featured Bart Pisha from the Center for Applied Special Technology in Boston, who facilitated a

discussion on the value of having students develop keyboarding skills, and Sheryl Burghstaler from the University of Washington, who facilitated a discussion about her science-related “Do It” project.

After migrating to the Web, we have held another type of special event, entitled “TEC Author Online.” Authors of articles appearing in *Teaching Exceptional Children* (a journal published by the Council for Exceptional Children) hosted a discussion about their article. Some examples of these special events include the following:

- *Employability Skills + Family Support + Adult Agency Support + On-the-Job Support = Successful Employment*, Patricia Patton, Colleen Harmon, and Bridget M. de la Garza
- *Partners in Enrichment: Preparing Teachers for Multiple Ability Classrooms*, Alexander Casareno and Edwin S. Ellis
- *Perspectives on Technology in Special Education*, Edward Blackhurst
- *Positive Change Through Computer Networking*, Gladene Robertson, Leonard Haines, and Robert Sanche
- *Sharing Ideas About Teaching Effectively: Using Technology to Collaborate*, Pam Campbell and Jack Tierney

As is typical in this type of forum, participants directed most of their comments to the online host, who responded by answering the query, reacting to the comment, and/or then inviting others to share their perspectives.

Online Workshops

Our online workshops had a more structured format. Open only to registrants, they offered readings, offline and online activities, and a place for reflections. With Joy Zabala from Houston, Texas, as the facilitator, we ran the “Ready! SETT! Go!” workshop twice. Each time there were approximately 25 participants. Pati King-DeBaun and Caroline Musselwhite co-facilitated “The Art and Writing Connection” workshop with 60 participants. Both workshops required that the

facilitators keep participants on track, guide them through a weekly task or activity, and encourage interactivity to foster the building of knowledge.

Recruiting Facilitators

We relied on three criteria for facilitators for our online opportunities. First, the facilitator needed to have strong content knowledge. Second, we sought online facilitators who had experience as trainers or teachers of workshops or courses. Third, our facilitators had to express a genuine desire to learn, along with us, about what it takes to be successful in this new role.

Given the newness of the Internet and online learning, prior experience with the Internet was not mandatory. However, we knew that some facilitators were reasonably comfortable in conversing online since we had observed their natural flair as active discussants in the NCIP online events described above. Others, however, were new to the world of online discussions, which has many distinctive characteristics as described in the next section.

CHARACTERISTICS OF THE ONLINE ENVIRONMENT

An online environment has many characteristics that make it different from a face-to-face workshop, course, seminar, or other situation where adults learn together in a group. One defining characteristic is that communication is generally asynchronous (Tinker and Haavind, 1997). In a face-to-face situation, when someone makes a contribution to a discussion, a response usually follows, either immediately afterward or after a short interval. By contrast, when someone posts a message online, there is likely to be a lag before responses are forthcoming. Because people log on when it is convenient for them (one of the attractions of online learning), it might take anywhere from a few seconds to several days to receive a reply. The message below, for example, acknowledges the problem of “wait time”:

Hello Sandra. I'm sorry it took me so long to notice that you had responded to the first message I posed. I have been teaching a high-enrollment grad class. . . . so I have not logged in as much as I did in "my week" on duty.

A cluster of features stem from another defining characteristic of the online environment: the written word is the medium through which people communicate. All knowledge, questions, concerns, reflections, and suggestions are conveyed through written messages. This "write-only" and "read-only" attribute has the potential to create barriers to communication and understanding. Since people tend to be more facile and comfortable when they are speaking than when they are writing, they might be reluctant to post messages, especially when they are expected to say something "intelligent" in an online learning situation. They might be afraid to leave a "paper trail" of their thinking, fearing that their written words will return to haunt them later. Furthermore, writing that reflects careful reasoning or thinking takes time; not everyone has the necessary time. Finally, participants in online meetings have no extra-lingual clues to key into in order to understand others. In the online environment, unlike a face-to-face setting, a person cannot rely on facial expressions, body language, chuckling, frowning, smiling, behavior, and/or actions to understand someone else. Moreover, participants cannot even develop first impressions of people based on their appearance.

Taking part in a face-to-face learning experience—for example, a course, workshop, or seminar—is a common experience. But participating in an online environment is a new experience for many people. Participants, as well as facilitators, have few models to rely on for how they are to think, collaborate, share, and build knowledge in an online environment that depends on writing. We know what constitutes successful teaching in a face-to-face setting, but the criteria by which to judge successful online facilitation are still emerging. The growing literature in this field, however, does shed some light on what online facilitators are supposed to do.

WHAT SUCCESSFUL ONLINE FACILITATORS DO

The literature on online learning and facilitation has begun to specify what online facilitators need to do to be successful (Berge, 1996; Harasim, Hiltz, Teles, and Turoff, 1996; Tinker and Haavind, 1997; Spitzer, Wedding, and DiMauro, 1996; Hiltz, 1995; Davie, 1997; Riel, 1997; and Kimball, 1995). An analysis of these articles reveals that the facilitator's roles and responsibilities fall within the following categories:

- orienting participants and guiding them to post and read messages, as well as to locate, review, and download relevant messages, materials, and resources
- making sure that participants understand the expectations and norms for respectful interaction, as well as knowing how to follow directions for carrying out the associated tasks and activities (both online and offline)
- creating a strong, interactive learning environment by encouraging participants to provide information and resources, discuss issues, and collaborate with each other to generate solutions to problems
- using a variety of strategies to help participants expand their knowledge based on their particular situations, needs, interests, and abilities, such as:
 - asking people to elaborate upon, justify, or support ideas, especially if there are conflicting views or multiple perspectives
 - infusing content information to nourish the conversation
 - pointing out ways in which one person's comment links to or builds upon another's; encouraging the connection of ideas, thus moving the communication from individual ideas to a group understanding
- encouraging participants to reflect on what they have learned and what impact this information has on their beliefs and behavior
- guiding participants, as relevant, to critique the online learning experience from a personal and professional perspective

When we recruited online facilitators for NCIP's topical discussions, special events, and online workshops, we did not assume that our facilitators would know how to carry out these actions. Therefore, we worked closely with them to ensure that they would be successful. Next we discuss the emerging strategies we used to work with them.

EMERGING STRATEGIES

Some of our strategies relate to the process of designing an event; others relate to implementation; and still others help bring an event to closure. Some strategies require that we work behind the scenes; for others we are visible to participants, serving as ex-officio facilitators.

In our most visible role, we take responsibility for responding to technical questions and providing user support. In this way, participants' technical issues are handled quickly, and the momentum of the discussion is not compromised. NCIP's assuming of this responsibility frees the facilitator to devote time and energy to the substantive aspects of the role. One of the facilitators noted how relieved she was when she knew that she could tell participants to contact NCIP for help, as she did in the following example:

It may take a few tries to get used to HyperNews but there's lots of help available from Denise [NCIP technical assistance provider] if you're confused. You may want to consider subscribing to this conference so all entries will be delivered to your e-mail and you won't miss anything (see the Technical Tips at the top of the Views page). As Denise suggested, be sure to make NCIP Views a bookmark so you can check in and add your ideas often.

In addition to handling technical issues, NCIP has developed the following four strategies to support facilitators:

- co-constructing workshops with the facilitator
- modeling and mentoring

- coaching to prevent and ameliorate problems
- working in tandem with the facilitator to promote interactivity

Below we discuss each of these strategies and provide examples to further illustrate how we provide support.

Co-Constructing Workshops with the Facilitator

From the initial stages of conceptualization, we collaborated with Joy Zabala to design the SETT workshop and with Pati King-DeBaun and Caroline Musselwhite to design the art and writing workshop. We chose to collaborate for three reasons: to showcase the facilitators' content knowledge; mold the online workshop in ways that captured the structure and organization of the facilitators' face-to-face workshops, as appropriate; and allow the personalities of the facilitators to shine through.

Before developing the SETT workshop with Joy Zabala, we spoke with her about the design principles underlying her face-to-face workshops, attended several of her conference presentations, and reviewed her presentation materials (overheads, handouts, readings, etc.). We then created with her a four-week design that maintained the key elements of a face-to-face SETT workshop. We expected online participants to

- read a case study about a student with disabilities who could benefit from technology
- analyze the case according to the SETT Framework, which stands for S=Student, E=Environment, T=Tasks, and T=Technology Tools (and support services)
- engage in discussion and debate as if they were part of a team meeting (a “virtual meeting”) that involved teachers, specialists, administrators, and parents

In addition, participants introduced themselves, modeling their introductions on one posted by Joy; reviewed background readings

and resources (available in hard copy and online); and filled out evaluation surveys before and after the workshop.

Our collaboration with Pati King-DeBaun and Caroline Musselwhite followed a similar pattern. Since we had already attended their sessions at national conferences, we had a strong understanding of the content and flow of their jointly presented face-to-face workshops. After several conference calls, supplemented with faxes, we narrowed the focus of the workshop and decided which topics would be covered over a four-week period. These included “Books for Learning, Books for Fun”; “Connecting Art and Writing”; “Building Success for Writing”; and “Making Writing Fit into Your Busy Schedule.”

Our most intensive planning with Caroline and Pati involved the issue of personalized responses to participant’s messages. Noting that Joy had responded to every message from every one of her 25 participants, Pati and Caroline wanted to achieve the same individualized approach. However, since they were aiming for an enrollment of 60, they realized that they were setting an overly ambitious goal. To solve the problem, together we devised a two-pronged approach. In conversations that involved all participants, Pati and Caroline agreed to post intermittent summaries, after several participants had posted messages. At the same time, we created a built-in opportunity for responding to every message within an “activity center.” In this component of the workshop, participants tried out suggested activities in their classrooms and reported the results online. Only a subset of the total enrollment participated in the activity center. For this smaller group, Pati and Caroline decided that they would offer the kind of personalized feedback that Joy’s participants had found so valuable.

Modeling and Mentoring

We carried out modeling and mentoring before and during online events. Three strategies were particularly helpful to facilitators before the event began. First, we recommended that “on-deck” facilitators closely observe the practices of other online facilitators. They might visit an online event in progress or a discussion that NCIP had archived. Christine Alpert, a facilitator for a forum on

technology applications, followed our advice. As she reported, “It was useful for me to go back and look at old ‘Views from the Field’ and see how things were handled.” In addition, we suggested that novices ask experienced facilitators to debrief, sharing what they had learned. Using this strategy, Pati and Caroline contacted Joy right after her course ended while the experience was still fresh in her mind. She offered them advice about how much to post and when. Second, we offered specific tips and directions. For instance, after the first *TEC* Author Online Event, we compiled a list of suggestions, as shown in Figure 1, that we sent to each upcoming *TEC* author. We asked them to review the list, call us with questions, and begin to implement the ideas. Third, we helped facilitators write biographies about themselves to accompany the photographs that we posted online. This strategy helped the facilitators feel like real people to the participants and allowed them to “be themselves” online. Facilitators for one of the *TEC* author online events later reflected that the introductory pictures and biographical information made them “feel like individuals to participants.”

Figure 1:

TEC AUTHOR ONLINE EVENT SUGGESTIONS

In Preparation for the Event

1. It would be very helpful if you could become familiar and comfortable with the *TEC* Author Online structure and HyperNews conferencing system.
It's located on NCIP's Web site: <http://www.edc.org/FSC/NCIP>.

From our home page, select *TEC* Author Online.

You can read messages posted during the ongoing or previous *TEC* Author Online. In fact, in order to "practice" sending a message, you could post a new message to that conference, introducing yourself and inviting people to participate beginning April 21.

You can also become familiar by reading and/or posting in the NCIPnet Views discussion conference, which uses the same HyperNews conferencing system. Again, an introduction/invitation would be great (and you might even get some discussion started before the event itself).

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2. We'll need a few items from you in order to prepare the pages for your online event. The earlier you can send these items, the better:
 - ✓ A bio and if possible, a picture. If you already have a picture posted someplace on the Web, we can grab it from there. If not, send us a copy and we'll scan it in.

✓ A draft of an “opening paragraph” with several lead-off questions. See the example from the previous online events. The purpose here is to give a 1-2 paragraph “teaser” that invites people to jump into conversation with you. We’ll edit the paragraph if needed.

✓ If you have any additional resources (charts, documents, vignettes, other papers) that weren’t printed as part of the article, but would be useful for discussion purposes, please send them to us, and we can try to work them in. Again, see some of the earlier events for different examples of how we can link up resources.

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3. During the event, Judy will serve as a co-facilitator and will post some comments and questions to try to get and keep the conversation rolling.

Once an online offering was in progress, we shifted our mentoring and modeling strategies. For example, we frequently posted messages that would serve as models for both the online facilitator and the participants. In the SETT workshop, for example, one of us posted the following message:

I observe that Josh is unable to write legibly even for short periods of time. I would like to know if/how his keyboarding ability changes over periods of time (i.e., what impact does hand fatigue have on his speed, errors, etc.?)

For one of the *TEC* author online events, we again modeled for both the facilitator and the participants how to situate a question within a question. Soon after the event began, we posed the following question to Pam Campbell, a developer of CoPlanner, a software program that encouraged teachers to collaborate:

The features of CoPlanner are very elegant. I can easily see how the format, guiding questions, and tools promote collaboration among teachers and specialists.

Have you been able to follow teachers over time as they use CoPlanner? If so, in what ways do teachers change over time? In what ways do they expand their knowledge? Do they change their beliefs? In what ways do they change their instructional practice? How much collaborative coplanning does it take before new habits emerge?

I am asking these question because we are carrying out a research project that engages teachers in collaborative planning around improving inquiry-based science instruction for students with disabilities.

Teachers tell us that they find this collaboration, supported by our paper and pencil tool, to be very powerful. However, we want to be able to study change over time. That's what motivated my questions above.

As an event progressed, facilitators often found themselves wondering how to respond to a message that might create controversy, was too personal, or could be offensive. In addition to offering our own suggestions, we once again encouraged facilitators to use other online facilitators as models. By observing how others had handled a difficult situation, we reasoned that they could learn which approaches were successful and which were not. Christine Alpert reported how this approach worked for her:

Whenever I wasn't sure how to respond to something, I would go back and look at how Joy Zabala or someone else might have responded.

Another facet of mentoring involved our offering positive feedback to the facilitators when it was genuine and justified. When we noted that facilitators were making "moves" that were productive, we would send them congratulatory e-mail messages to support them. For example, we sent the following message to one of our facilitators:

It was great the way you asked several leading questions designed to tap into various people's interests. Hopefully, someone will "bite" and get conversation going.

Later Joy Zabala said that the encouragement was critical to her success:

NCIP staff made me feel valued and capable and able in a venture that was totally new to me! That invited me to be more inviting and reinforcing to participants, since I was more comfortable myself.

Coaching to Prevent or Ameliorate Problems

We often coached facilitators to prevent problems and help them succeed. For example, to help facilitators elicit immediate participation, we helped them to craft a provocative question or a warm and inviting introductory statement. Christine Alpert recalls that "Arlene [Remz from NCIP] provided me with suggestions and feedback" related to the draft of her opening message. The message finally read:

As the "current facilitator" for NCIP Views, I'm looking forward to some good discussions to brighten up the winter months! In October, I had the opportunity to participate in the on-line SETT workshop (where I met Joy, Mia, and Mandy). We had some interesting and thought-provoking exchanges, as did the November group. I'm hoping that NCIP Views can provide a place for continued sharing and also expand on some of the topics introduced in previous forums.

In addition to welcoming NCIP veterans, I'd like to welcome newcomers (like my friends who have PROMISED to contribute—you know who you are). . . .

My New Year's resolution for NCIP Views is for lots of interaction, conversation, and discussion. If you have questions (and certainly if you have answers!), ideas, or problems to solve please post them. Check out the NCIP Bulletin Board for

announcements, "ads," or newsbytes of information you want to pass along.

Once an event was underway, we kept close tabs on it, carefully noting the level and degree of participation, the questions and concerns posed by participants and facilitators, and the extent to which people were fulfilling requirements, especially within a workshop. We acted as diagnosticians, identifying emerging problems before they festered and then working with the facilitators to remedy the situation.

For example, at the end of the first week of "The Art and Writing Connection" workshop, we noticed that few of the participants who had opted for the activity center posted messages reporting on the outcomes of classroom activities. In addition, we were receiving questions via e-mail indicating that people were confused about what to post and where it should go. We recommended that Pati and Caroline clarify the directions. Based on our suggestions, they provided participants with the following information:

Hi Folks, For those of you who are "activity participants," now is the time to start posting those book reviews! (Refer to Activity Schedule for March 3-9 for specifics.) Here's how it works: a) Choose a book and use the Books for Learning Checklist for your initial evaluation of the book; b) If it seems like an appropriate Book for Learning for your students, write up a brief review, using the model we included in our "Pati & Caroline's Books For Learning" set; to do this, you might want to include a couple of lines of information about the book, tell who it is most appropriate for (use your Communication/Literacy Profiles), and think of potential goals for students having the various Communication Literacy Profiles.

I know the format may seem a bit cumbersome at first, but the intent is to get us to focus on specific communication and literacy goals that we might address using a Book for Learning. Anyone want to give it a shot? I'll be checking!

To prevent further difficulties in the succeeding weeks, we coached Caroline to post messages that gave participants a status update and described the next steps. After the third week, she wrote:

We're moving on to Topic 3, though Topic 2 will still be around for you to explore and get any information you might have missed. Please feel free to continue to add strategies and materials to the Activity Center for Weeks 1 and 2, as well as starting to send in ideas for Week 3.

We then added a follow up to the facilitator's message, which reinforced her directions:

The Topic 3 area is ready. Topic 3 is a look at creating writing activities related to storybooks. Come share your ideas at <http://www.edc.org/cgi-bin?HyperNews/NCIP/EC/get?Topic3.html>.

Finally, we coached Pati and Caroline at the end of each week to distill important ideas to serve as a bridge to the next week. In response to our suggestion, Pati posted the following message:

“Wow, what a great week! The main themes of this week seem to be ‘process, not product,’ helping students gain independence through light-tech and high-tech approaches and lots of creativity (students and teachers).

Working in Tandem to Promote Interactivity

The goal of interactivity is to have as many participants as possible contribute to a vibrant, on-topic conversation. We developed several strategies to help facilitators promote interactivity.

First, we addressed a major concern of facilitators: how the frequency of their postings affects interactivity. Some facilitators worried that if they posted messages too often, especially if they thought “business was slow,” they might deter others from engaging in the conversation. For example, Joy Zabala expressed this concern, yet she wanted to be sure that all messages were eventually responded to. She wrote: “. . . things are slower than I’d like, but I’ve learned that if I can just hold out someone will say something!” Other facilitators feared that if they waited too long to post a message, participants would feel neglected, or, perhaps worse, think that the facilitator was lazy.

We worked hard to assuage the facilitators’ concerns by sharing our growing understanding about the linguistic, social, and emotional reasons underlying a reluctance to post messages. We reminded the facilitators that participants might lack the time needed to think and write about something important, might have difficulties putting into words what they really want to say, or might feel vulnerable in knowing that their messages are open to public scrutiny.

In supporting the facilitators, we did some hand-holding. If, for example, we suggested that facilitators refrain from jumping in to give participants time to respond, we “waited it out” with the facilitators. On one occasion, we assured Joy Zabala repeatedly that discussions can slow down at times and that she shouldn’t feel that it was all her responsibility to create more activity. When we helped Christine Alpert in this same way, she found that our being by her side was comforting:

Arlene was particularly helpful in answering my questions about “what do I do if . . . ? and alleviating my panic every time a few days went by and there were no new responses and items.

Serving as ex-officio co-facilitators, we employed several support strategies to help the facilitators foster interactivity: offering participants tips to jump start interactivity, posing questions to help facilitators initiate or sustain conversation, posting follow-up messages after the facilitator has posted something, and synthesizing information.

Tips to Participants

Providing tips to participants took the burden off of the facilitator. We became the ones who nagged and nudged, not the facilitators. For example, during the SETT workshop, we posted suggestions to participants drawn from our own observations, comments from prior participants, and the literature, such as:

- contribute often, even if it is just a brief sentence or two, or a word or two; let everyone else know you are reading messages in the discussion
- ask lots of questions about process and content
- ask for technical support
- if you subscribe to the conferences, you will receive a copy of the messages in your e-mail (a real time saver, especially if you are paying for access)
- compose offline
- read offline and make notes about what you would like to post before going online
- try to set aside time every day to check your e-mail for new messages

We also sent personal reminders to participants privately via e-mail. For example, in “The Art and Writing Connection” workshop, after Caroline Musselwhite posted her directions about moving onto to Week 3 activities (see above), Denise, of NCIP, sent a reminder via e-mail to each participant alerting him or her that we were moving on.

“Set up” the Facilitator

After facilitators introduced themselves in the *TEC* Author Online events, we usually led off with a provocative question. For example, in an event hosted by Ed Blackhurst from the University of Kentucky, an NCIP staff member posted the following message:

Ed, I liked what you said in your article about starting with no-tech or low-tech solutions and then working your way up the continuum to medium- and high-tech solutions.

I agree that we never want to be device driven—but, rather, be driven by desired student outcomes, the student’s abilities and needs, environmental factors, and other issues related to curriculum, instruction, and assessment. My question, however, is what specific criteria should guide decisions? Similarly, what criteria should we use to determine over time if an initial solution is still the most viable and effective one for a particular child? How can we ensure a process of ongoing assessment so that the solution is always in sync with demands and goals and changing competencies?

This message gave Ed the entry he was looking for. Below are excerpts from his reply:

Your question is a terrific one and a hard one to answer. . . . (You sure have a knack for getting right to the heart of a matter.) I’ll respond in several ways.

The quick and simple response to the question about criteria is: “The general criterion that should be used to guide decisions about assistive technology selection and use is that the solution should enable the student to respond to environmental demands in an effective and efficient fashion.” This response

may seem rather simplistic because it leads to other questions, such as "What is meant by effective?" and "How do we measure efficiency?" However, it is a central concept to the application of the functional model that was alluded to in the TEC article. The situation is certainly more complex than this, however, and the challenge facing us is how to operationalize this concept. . . .

I look forward to other responses that are prompted by Judy's [Zorfass] questions. They certainly point us in the direction of needed research to identify criteria that can be used to guide decision making and the development of instruments and procedures to conduct such assessments and monitoring.

As a result of this interaction, the ensuing conversation was lively and engaging.

Posting Follow-up Messages

We wanted to avoid a situation in which the facilitator posted a message that just “hung” in cyberspace for an extended period. Therefore, we often took responsibility for posting follow-up messages that echoed, validated, and extended what the facilitator had just written. For example, when Christine Alpert led one of the topical discussions, she posted a message asking for information about how to make worksheets for students using FileMaker Pro. She had heard about this idea from a presenter (Judy Sweeney) at a national conference. But having arrived late for the session, Christine had missed the key information. She posted a message asking for the information, not just because of a personal need, but because the topic was relevant. Her message closed with these comments and questions:

. . . I missed the part about why ClarisWorks database applications won't do the job as well. . . .

It does seem like a good way to make an accessible, easily customized electronic response format.

Has anyone done this and want to comment on ease (or hassles) of working with FileMaker Pro or some other database program? Any tips to share?

When several days had passed without response from participants, Arlene Remz from NCIP, who had attended the same conference session, posted a message that shared relevant information. Drawing from her conference notes, Arlene responded:

Here's what I have written: advantages of FileMaker Pro over ClarisWorks=pictures, sounds, scripts, ability to set fields, ability to ignore fields.

Arlene's message included other pertinent information. Wanting to reopen the conversation and give Christine something solid to work with, Arlene ended with this question:

Anyone else have any more info about Judy Sweeney's use of FileMaker Pro templates or any other similar applications?

A few people offered selected tidbits of valuable information. Like Arlene, many of us from NCIP frequently contributed to the events, introducing new topics when things were slow, responding to questions or discussions initiated by others, and making appropriate links to online messages and resources.

Synthesizing Information

While in the midst of a discussion, facilitators juggled many ideas and strategies; thus they did not have the time needed to carefully synthesize information. We worked in tandem with our facilitators by taking responsibility for synthesizing key information from an ongoing discussion. We believed that a succinct and timely synthesis could foster interactivity by enabling participants to reflect on what had been said and to jump into the conversation.

We synthesized information in several ways, depending on the format and goals of the online event. For example, in the general discussion area, we regularly synthesized the discussion by creating an introduction to the discussion area that included links to the

major topics currently being discussed. As the conversation evolved, we edited the introduction to reflect new topics under discussion. On other occasions, we published a review of the conversation to date and then asked questions based on what had been discussed.

In the SETT workshop, participants discussed a case study about a student with multiple disabilities. We used a graphic of the SETT Framework to synthesize information. The Web-based graphic contained four columns (student, environment, task, and tools). We distilled the key ideas from the messages and listed them on the graphic in the appropriate column. Each item listed on the graphic was linked back to the originating message. Joy Zabala found our behind-the-scenes synthesizing invaluable:

This was very helpful to me and to the participants. We were able to easily see what had been said and what still needed to be said, where questions had been addressed and where we needed to probe further. Hopefully, this also provided a model for participants when they attempted to use the SETT Framework in their own work environments.

TESTIMONIALS: EVIDENCE OF SUCCESS

Did the strategies we used to guide our facilitators prove to be successful? To explore this question as well as others related to online learning (e.g., Did we reach our intended audiences? How did participation affect knowledge, beliefs, and practice? How could we improve our online endeavors?), we carried out two evaluations, supplemented by ongoing data gathering.

Our data-gathering strategies included the following:

- asking participants to fill out questionnaires sent to them via mail and e-mail before and after an online event
- holding informal focus groups at national conferences with online participants
- sending an e-mail survey to facilitators

- holding informal telephone interviews
- analyzing online messages
- gathering statistics about usage

The overwhelming majority of participants' comments and reflections suggest that facilitators were successful, especially in creating a strong interactive learning environment, making participants feel like valued contributors, and supporting the participants' building of knowledge. Figure 2 summarizes participants' assessments.

Figure 2:

**EVIDENCE OF SUCCESSFUL FACILITATION:
ASSESSMENT BY PARTICIPANTS**

**Created a Strong Interactive Learning Environment where Individuals
Feel Valued**

- ☞ Joy was positive in her feedback
- ☞ made me feel welcome
- ☞ bringing everyone into the SETT dialogue
- ☞ encouraging people to chime in
- ☞ . . . allowed different opinions in a nonconfrontational manner
- ☞ she [Joy] had a way of making each person feel as though his/her comments were important and significant to the process
- ☞ I thought Joy made exceptional efforts to personalize the interaction
- ☞ she [Joy] was good at keeping people on track without being mean about it
- ☞ the wealth of sharing was wonderful
- ☞ they reinforced the contributions for the ideas
- ☞ positive and upbeat

Facilitated the Building of Knowledge

- ☞ helped in encapsulating ideas
- ☞ helped to clarify and reflect upon posted messages
- ☞ made me think about and explain why I felt certain issues were important
- ☞ new insights into the beliefs and concerns of others
- ☞ They were able to pose questions that sought specific information

The comments by online facilitators capture the appreciation they felt for the active role we at NCIP played in providing guidance and support. As one facilitator observed:

I cannot imagine how so many formerly unknown colleagues from around the nation and the world could have possibly come together for sustained collaborative work if not for the leadership and expertise of the people at NCIP, who helped me do my job.

Our prediction is that the demand for online learning opportunities will only increase in the future. People like logging on when it is convenient, having access to national experts without leaving their home or work environments, and being able to link to many resources. Accompanying this increasing demand will be a need for strong and effective online facilitators. Like all teachers or leaders, some facilitators will have a gift for online leadership and others will need guidance. Now, while this medium is still in its infancy, we have the opportunity to create a powerful set of strategies to support those who will design and lead online professional development now and in the future.

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