

SCOPE: THE DESIGN OF AN ONLINE COMMUNITY

by

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ABSTRACT

Simon Fraser University's Community of Practice for Educators (SCoPE), an online community for individuals who share in an interest in education research and practice, provides opportunities for sharing and dialogue across disciplines, geographical borders, levels of expertise, and educational sectors. Prior to launch in fall, 2005 we undertook a number of research, planning, and design activities to inform our choices about platform, core activities, and initial preparation of the community environment. We continue to shape the community environment and plan for future activities based on participation and feedback from our members. This project documents the activities and observations that have informed the design of the SCoPE online community.

Keywords: online community; elearning; community of practice; learning community; faculty development

Subject Terms: education; educational technology, community of practice

DEDICATION

So many of the people who have had a huge influence on my interest and dedication to online communities aren't aware of their impact. Some I have never met in person and probably never will. They have no idea that I'm watching their contributions to the field so closely. Here's to all the people who share their ideas, resources, and experiences so openly! And here's to the people who continue to encourage others to do the same.

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CHAPTER 1: INTRODUCTION

Who am I to say?

People often ask me what I do for a living. My neighbours in the small community of Lac le Jeune, British Columbia know I can be tucked away in my house for hours at a time, see my lights on at 4:00 a.m., and probably worry about my social life! I'm often spotted paddling on the lake in my kayak or snowshoeing on the trails in the middle of the day. When my friends and family find me answering the phone at home they continue to ask: "Oh, aren't you working today?" implying this thing I do sitting in front of my computer can't really be work.

People I meet online are surprised to learn that I rarely set foot on the Simon Fraser University campus, and razz me about working in my pyjamas and the background noises during conversations, like dogs barking and bluegrass music. Sometimes I'm addressed as Dr. Currie in email correspondence, but most people have figured out that I've created this community leader persona by taking full advantage of what everybody else in this field can teach me, learning all about this online community business as I go along. This thing I do is hard to describe.

I call myself the SCoPE community coordinator. Other titles are used for this type of work: host, producer, moderator, convenor, animateur, and leader. I chose coordinator because it sounds like I help to make things happen, rather

than oversee or delegate. I often actively participate in the activities I coordinate, slipping in and out of my coordinator role.

On paper this is a part-time job, but in reality it's with me a good part of the day and evening, and most weekends and holidays. A typical morning in my home office might include checking in on the current discussions, log files for recent participants, profiles for new members, and RSS feeds for members' blogs. I read and respond to email that has rolled in through the night, following links and flagging items to read or respond to later, or to add to the community calendar. This is the part of my routine where I go off on tangents. Reading to stay current and participating in discussions in other communities is big part of my work. I come across new people, tools, trends, and ideas every day. Occasionally, I have Skype or other synchronous meetings. These are the real-time events that sometimes cut into my flexible work habits, but mostly my work is asynchronous which is the way I like it. If I'm not concerned with coaxing a seminar discussion along that is going through a quiet spell, I'm busy planning the next one – corresponding with the upcoming facilitator, updating the SCoPE site with new details, or thinking about ways to spread the word. Or I might be writing a monthly newsletter, or monthly summary reports for the person who processes my invoices each month. Usually there are other projects on the go, such as conference presentations to prepare for, workshops to attend, reports and research proposals to write, and so on. Throughout the day I'm in and out of the SCoPE site to do little checks here, and little tweaks there. How do I describe my work? Flexible, demanding, exhilarating, humbling, and inspiring.

Thinking about community design

Several design practices captured my attention when I first started thinking about the software design and learning communities. Activity theory was appealing for the holistic approach to analysing complex interactions by focusing on the structure and integration of interrelated elements of the system: the object, mediating artefacts (tools), rules, community, and division of labour (Bakardjieva, 1998; Cole, 1993; Currie & Campos, 1999; Nardi, 1996). Participatory and situated design (Bodker, 1991; Schuler & Namioka, 1993) provided a strong rationale for direct and continuous interaction with members of the workplace or community under study. I was also intrigued by the plethora of examples of poor design and the body of literature offering explanations for design failures (Norman, 1988, 1990).

The literature provides useful frameworks for thinking about online communities in different ways, and how to go about planning (Wenger, McDermott, & Snyder, 2002). The writings that influenced me early on emphasized community as a process rather than a single instance or even iterations of design, and the importance of attending to both sociability and usability (Preece, 2000). I also appreciated the stories emerging from communities that were dealing with cutting edge technologies, such as Tapped In (*Tapped In*), where enabling as many teachers as possible to participate meant staying “one step ahead” (Schlager, Fusco, & Schank, 1998, para. 3). More recently, a new label has emerged to describe the work of a community coordinator in relation to the selections and use of technologies and how

communities and technologies shape each other (Wenger, White, Smith, & Rowe, 2005).

Technology stewards are people with enough experience of the workings of a community to understand its technology needs, and enough experience with technology to take leadership in addressing those needs. Stewardship typically includes selecting and configuring technology, as well as supporting its use in the practice of the community (Smith, 2006para. 2).

This is a role I can relate to very much. If I have in fact earned the title, it's one I'll always strive to live up to.

In many ways I feel as though I've approached this thing backwards. So much of what I have learned about how to go about designing an online community comes from my own participation in SCoPE and other online communities over the past 8 years – watching, listening, experimenting, and reflecting, then lining up my assumptions against published guidelines and advice from experts. Various toolkits and checklists such as the Template for Success: 15 Tips for a Virtual Community of Practice Leader (Kimball & Ladd, 2004), the Community of Practice Design Guide (Cambride, Kaplan, & Suter, 2005), and Online Community Builder's Purpose Checklist (White, n.d.) have been valuable if not only to reaffirm that I'm on the right track. Workshops, meetings, events, and community experiences that have allowed me to engage in deeper dialogue and reflection with others who share my passion for online community have given me ideas and insights that cannot be gleamed from literature.

This report documents the activities and observations that have informed the design of the SCoPE online community. It provides a window onto my experiences as a community coordinator and the practices and decisions that both enrich and delay progress as SCoPE evolves. Hopefully this account is a first step in satisfying the need to “explore ways of talking about technology from a community perspective, rather than the perspective of technology creators or enthusiasts alone” (Smith, 2006, para. 5).

CHAPTER 2: EARLY BEGINNINGS

Global Educators' Network

The Global Educators' Network (GEN) was founded by Linda Harasim in 1999 as a way to bring together researchers participating in Canada's TeleLearning Network of Centres of Excellence (TLNCE)¹. From the beginning, scheduled and facilitated asynchronous discussions that focused on particular topics of interest to telelearning educators and researchers was the core activity and structure of the network, a format that lives on in the SCoPE online community. The network began with a bang, and some surprises!

Virtual-U software (L. Harasim, Calvert, T., & Groeneboer, C., 1996), developed at Simon Fraser University, was the platform used for GEN discussions. As a password-protected course management system, one of our first challenges in launching the Global Educators' Network was to manage the registration with the site. With the realization that it would be too labour-intensive to identify all TLNCE researchers and to process requests manually, a simple public registration page was developed by the Virtual-U Research project staff. The first seminar, "The Virtual Professor: What is it really like to teach online?" (L. Harasim, 1999) was announced through an existing TLNCE mailing list, and we waited to see who would show up.

¹ The TLNCE was founded in November 1995 as a part of the Networks of Centres of Excellence (NCE) program funded by Canada's three research granting councils.

Figure 1 Excerpt from GEN Update: December 1999

The Virtual Professor: What is it really like to teach online?

Our first GEN seminar, launched on November 1, 1999 and moderated by Dr. Linda Harasim, was very successful. It was scheduled to wrap up at the end of December. However, members are still actively participating! All GEN members will continue to have access to this conference.

(Currie, 1999)

The news of the launch of GEN spread quickly, and to our surprise, many people were finding their way in to participate and read along. While some of the participants were TLNCE researchers, most were not. Over time, by word of mouth, GEN continued to attract many new participants from all over the world. At the time the network hosted its final seminar discussion in 2003, GEN had grown to over 2,500 members from over 50 countries.

During my term as coordinator with Global Educators' Network I began to take notice of how the design of the community environment – the tools that supported our activities – influenced participation. The case of the open registration process is an example of how introducing a tool, simple and rushed

in its design, can cause you to revisit original goals and expectations. To our delight, GEN became a large, vibrant community.

During the 4 years that GEN was active I observed how members were using the tools available to them in the Virtual-U. I paid attention to both what was happening, and what wasn't happening. I noticed what supported community activities well, and predicted features and changes in practice that might improve the experience. Some of this information was collected through surveys and answers posted to specific questions about GEN in forum discussions. But much of the feedback was unsolicited; it emerged, sometimes in subtle ways, through participation in community discussions. Some of members' needs were addressed, but others were more complex, requiring extra resources for Virtual-U research and development. Terry Anderson (2002) describes the discourse and archives from TLNCE's Global Educators' Network as "perhaps the greatest legacy of the project". However, he suggests that the lack of tools to support a "push mechanism or RSS style dissemination" or "searching and filtering of discussion, announcements, results, or questions" was a major drawback (p.124).

The experience participating in the Global Educators' Network provided a good foundation for understanding how the design of an online community environment can influence participation.

Continued enthusiasm, but no place to go

When funding for the TeleLearning Network of Centres of Excellence ended, we reluctantly discontinued the GEN seminar discussions. However, my communication with participants did not stop. GEN members missed the opportunity for dialogue they had become accustomed to, especially the format of asynchronous discussions on topics related to teaching and learning online. In reflecting on what we shared in GEN, Linda Harasim posed the question: “What makes GEN a successful community?” This was my summary:

- GEN provides an environment for exploration and sharing of ideas, where learning is a collective and participatory process. GEN is unlike traditional teacher professional development which focuses on individual learning. Rather, individual learning is implied, and necessary, for the advancement of knowledge as a group.
- GEN offers new opportunities for dialogue across disciplines, geographical borders, professions, levels of expertise, and education sectors.
- GEN provides a connection to the everyday realities, current thinking, and practices of education professionals.
- Participation in GEN is flexible and inclusive. As a web-based and platform-independent environment, members are able to log on from any location, and from shared computers. VGroups conferencing system is easy to use, allowing participants to focus on the discussion rather than the technology. There are no costs associated with membership and asynchronous discussion allows for members to participate according to their own schedule. There is no obligation to participate according to a set structure. Reading along is acceptable, and members are encouraged to join a discussion at any time that they have time, feel compelled, or feel comfortable. As such, there is an opportunity to become acculturated, and ease in gradually if that suits the individual.

- GEN operates on a basis of shared goals and experiences. Facilitators volunteer their time because they are committed to the advancement of both online education and the GEN community itself.
- The community has evolved according to the needs of its members. GEN began as a means for researchers involved in TeleLearning NCE theme projects to share their progress and findings. However, gradually more and more educators, researchers, administrators, software developers, consultants, and students began to appreciate the value of engaging in timely discussions, and GEN quickly evolved into an international learning community. New events are scheduled by topic, so there is always something new and fresh to build expectations. Many of the proposed seminar topics emerge through former discussions, and many participants take on new roles as leaders and facilitators.

Indeed, it appeared we had succeeded in developing a rich community.

We were in alignment with the popular checklists of what makes a community tick. Early in 2004 I was contacted by Cindy Xin, a program director at Simon Fraser University's eLearning Innovation Centre (eLINC). Cindy had been an active member of GEN and TLNCE research, and was aware of GEN's success and also the ongoing requests to revive it. Cindy invited me to an eLINC department meeting to talk about GEN in hopes that there may be interest in funding and involving me in a future community project. By June of that year I was contracted to proceed with planning for a new online community. The yet-to-be-named SCoPE project began out of an interest to rekindle the popular discussions of GEN days.

CHAPTER 3: THE PROJECT PLAN

Envisioning the community

Elizabeth Wallace from SFU's eLearning Innovation Centre (eLINC)² was assigned the role of project coordinator. Together our first task involved sketching out the vision and goals, our intended audience, roles, proposed activities, the parameters around technology and access, and a basic plan for how to proceed. These initial brainstorming sessions produced a Project Plan (Currie & Wallace, 2004).

It is interesting to note how much the earlier experiences with GEN influenced the directions we were taking with SCoPE, and also how the Project Plan we produced, with a few minor exceptions, has provided the firm foundation for the SCoPE community. The vision and goals focused on essential elements: Scheduled, asynchronous, seminar discussions were proposed as the core activity, the community coordinator role would continue, and SCoPE would provide a venue for researchers to study online communities. Also, discussions would be moderated by volunteers as a way to gain feedback from peers on draft articles, research projects, beta software, and other work in progress, and to practice facilitation skills with the support of the community coordinator. Outside of scheduled activities, the community would offer a venue for showcasing the work of members, and for ongoing and open peer exchange of questions, advice,

² eLINC became part of the Learning and Instructional Development Centre.

resources, job opportunities, and anything else of relevance to elearning practitioners.

Also, as an extension of GEN, the original stated goal was to bring together individuals who share an interest in *elearning* research and practice. This was later revised to be in line with a organizational change at SFU to broaden the focus of the eLINC division to include all teaching and learning endeavours, hence placing less emphasis on the 'e' in elearning.

A stated goal which was quite different from GEN was to showcase and build on SFU interests and expertise. The early stages of implementation in particular would ensure that the interests and expertise of the SFU community were incorporated into the design of the community, and that the project would take full advantage of faculty development initiatives, research projects, software licenses (referring to resources allocated to software tools already in use by the institution and centrally supported), and software development work. A need for private spaces for members of the SFU community or other practitioner groups was anticipated, and ensuring flexible and inclusive participation, combining novices and experts, and options for different levels of engagements were emphasized.

Many similarities to the Global Educators' Network exist, but in addition to the strengths of GEN the SCoPE Project Plan also reflects the shortcomings of the Virtual-U course management system used to support community activities. For example, several essential features were listed: automated password reminders, member profiles to share information about themselves, and access

to the site resources and discussions without logging in. The Project Plan included these following core sections: roles, proposed activities, plan for technology and access, and proposed phases.

Roles

In the Project Plan the roles were sketched out as follows:

Advisory Committee

An Advisory Committee consists of informed stakeholders who can provide guidance and feedback in response to the various stages of development, and the community process. Responsibilities include:

- Attending meetings as scheduled
- Validating policies and procedures
- Confirming criteria for community evaluation
- Providing feedback on request
- Assisting in promoting the community

Project Coordinator

The Project Coordinator³ (an eLINC Program Director) facilitates the development and the implementation of the eLearning community. The Project Coordinator is responsible to the Director of eLINC for:

- Consulting with the Community Coordinator
- Acting as the liaison between various SFU resource people and project participants
- Monitoring and reporting on project expenses
- Monitoring and reporting on progress in various stages of the project
- Assisting in the launch of the community
- Participating in community activities
- Facilitating ongoing evaluation of the project.

³ This title was later changed to Project Manager

Community Coordinator

The Community Coordinator is responsible for the design and the day-to-day operations of the community. A primary responsibility for the Community Coordinator is to constantly watch for, and bring forward, actions and communication that are indicators of success, problems, and community needs. The general tasks include:

- Identifying potential opportunities for seminar topics, events, liaison, and partnerships
- Planning, organizing, facilitating, and promoting activities and events
- Monitoring community site access and dialogue
- Fostering the development of members
- Correspondence related to the community
- Continually assessing the value of the community
- Maintaining the community environment and resources
- Maintaining member accounts / mailing lists
- Consulting with the Project Co-ordinator and preparing reports as required.

Moderators

Individuals volunteer or are invited to moderate discussions because they have an interest in a topic and will benefit from sharing their knowledge, skills, research, products, and work in progress. The moderator works with the Community Coordinator to prepare for and facilitate a discussion.

Technical Support Staff

The primary roles of individuals involved in technical support are:

- to install and set up hardware and software to support the community, and
- to troubleshoot technical problems as needed.

As the need for technical support is likely sporadic, particularly after initial start-up, this support role is best assigned to an eLINC employee as part of their regular duties.

Writer

A valuable outcome of any scheduled discussion is a summary of topics, highlights, resources, further questions, and next directions. Moderators may be willing to take on this role, but do not always have the time, and may also benefit from sharing this role with another member. Having a writer available for each scheduled seminar would add value to the community archives. This could be a paid student position.⁴

Member

Members are individuals who choose to create a community account. They may choose to participate at a level that suits their interest, time, and comfort level.

Proposed activities

Community activities will focus on teaching and learning practices, research, development, and technologies related to elearning. It will operate on a basis of shared goals and experiences, with activity ideas and directions emerging through participation by its members. The following is a list of proposed activities that would serve the intended audience.

Seminars

Scheduled seminars facilitated by volunteer moderators will provide the foundation of the community. These seminars will be free and open to the public.

Exchange Centre

Designated areas for ongoing dialogue, sharing resources, and posting announcements, etc.

Research

Graduate Student Research: The community will provide a venue for students

⁴ It is still felt that this role would be a valuable contribution to SCoPE, but funding has not been available.

who are interested in sharing and obtaining feedback on their elearning research, or who are interested in studying online communities of practice.

Software Research and Development

There are many ways in which the community can leverage elearning software design and development work, such as organized focus groups and software release announcements.

Enhancement to campus-based activities

Opportunities to support existing campus-based activities will be explored. For example, Faculty Learning Communities, and workshops that are supported through the Learning and Instructional Development Centre (LIDC) could be promoted and supported by the community.

Teaching enhancement courses and programs

Online programs that are currently offered by SFU could be offered to the public.

Exchange of expertise and services with other communities

Several established online communities share the same basic goal with the Community of eLearning Practitioners⁵ – to bring together individuals who share an interest in elearning research and practice. Each community has a unique format and would benefit from an exchange of expertise and services. For example a core activity of LearningTimes.org is webcasts, and Edusource.ca exists to facilitate the sharing of learning objects. Liaising with these and other communities would be value added.

Continue to investigate ideas for activities

As stated in the introduction, the purpose of the preliminary design is to help the community develop, rather than impose a rigid structure. A major activity will be to continually investigate ideas for enhancing the community.

⁵ At the time the Project Plan was written we had not yet decided on a name for the community and the focus was on elearning.

Plan for technology and access

The community website will provide access to a collection of tools to carry out proposed activities, with the vision that this collection will be expanded. Also, on occasion, certain activities may take place at other venues, or using prototype tools. Given that a primary interest of the community members will be elearning⁶ tools and best practices, the community should be open to experimenting with a variety of tools to carry out its activities. Also, it is in the interest of the SFU community to use tools that are currently available and supported for carrying out work related to teaching and learning online.

Some essential components in order to launch the community are:

Website / Community Environment

An obvious goal for the website is that it will be easy and efficient to navigate and maintain. The initial design can be very simple, but with the intention of introducing more sophisticated features to support members and sustain interest.

Asynchronous Communication

Various conferencing tools will be explored and evaluated. An open source system is desirable because it will allow for customization. The PHP-nuke site recently developed for the Co-op program at SFU will be reviewed as a viable option.

Synchronous Communication

As with tools to support asynchronous communication, various synchronous tools will be explored. Tools currently available to the SFU community will be explored, for example SFU currently leases Elluminate Live (eLive) (*Elluminate*).

⁶ As mentioned, during the planning phase the focus was still on elearning

Member registration

Individuals will be able to create their own members accounts. This will give them access to contribute to discussions, to upload files, to edit information about themselves, and to personalize their access. All free activities and archives on the site should be available to the public without logging in.

Eventually there may be a need to differentiate between different levels of membership. For example, if there are certain activities that are fee-based, but at a reduced rate or free to the SFU community, then we need to plan in that direction during the design phase.

Automated password reminders are essential, as well as the ability to control duplicate registrations. Automatic notification of any registration difficulties that members are experiencing should be enabled so that the community coordinator can provide immediate and personalized assistance.

Members should have access to edit a personal profile that contains biographical and demographic information. There should be an option to publish or keep private each field in the profile database. Certain fields should be mandatory so that we can track members. Also, while being able to see who is online will promote one-on-one networking, there should be preference setting to remain invisible to others while visiting the site. This is especially important for encouraging newcomers to visit the site to become acculturated and to participate at their own comfort level.

Systematic organization of resources

There are many types of resources that will be made available to supplement community events and activities, as well as those contributed by participants in these activities. In the site design thought should be given to how we will organize resources so they can be easily retrieved, and the context in which they were generated known.

Information about Participation

In order to monitor participation, connect individual members and their contributions, and identify access and navigation issues, it is important to have access to participation data.

Proposed phases

The Project Plan called for a four-phase approach which would occur over a 12-month period culminating in a public launch:

1. Research

This phase involves forming a development and advisory team, a literature review, comparative analysis of existing educator communities, review of software to support community activities, and consultation with prospective participants in the project. This phase helps to define the design phase.

2. Design

Phase 2 focuses on the design of the community environment, selection and integration of community tools, and the selection of activities for the pilot and implementation phases.

3. Pilot

During the pilot selected members from SFU participate in a scheduled activity. Throughout this phase we will continue to refine the community environment.

4. Marketing and Implementation

The final phase for the first year of development begins with the community launch. It involves finalizing a schedule of activities for the upcoming months, announcing the community launch through Internet mailing lists and personal invitations, and working with volunteer moderators to prepare for seminars.

Planning overkill?

In comparison to the quick launch of GEN, the phased approach to SCoPE seemed very elaborate. Why were we being so methodical and cautious? How would the benefits of our careful research and planning play out in the actual design of the community? The literature and our experiences have informed us that it is important to facilitate opportunities for members to shape the environment and participate in planning for future activities, calling for a minimalist design (Wenger, 1998), and a tentative platform (Barab, MaKinster, & Scheckler, 2004). How much design work can be accomplished in advance?

My concerns over the extended planning process were shared by members of the eLINC management team. On July 30, 2004 I was asked what I thought about an earlier launch:

Me again! I'm quite comfortable with the plan to launch earlier. It makes sense to involve the members in the design as much as possible from the beginning. We would need to decide on some of the basic communication tools to get us going, and work out a member management system. The community environment at launch time doesn't need to be terribly elaborate; we just need to design it so that it can evolve easily. I'll work on adjusting the timeline, and the library, along with the rest.

This provided an opportunity to revise the plan, but unfortunately it didn't result in a faster launch. The stages of this plan were followed, and the various exercises we engaged in were instrumental in guiding our community design work. However, there were some unexpected delays, particularly in making a decision about a community platform. The next chapter outlines the activities for Phases 1 and 2: Research and Design.

CHAPTER 4: JUST LAUNCH THE DARNED THING

Beginning engagements

Following approval of the project plan by we entered the research phase.

Activities for phase 1 included:

1. Identify development team and advisory committee
2. Consultation with prospective participants in the project
3. Literature review
4. Comparative analysis of existing educator communities
5. Review of communication and community tools
6. Recommendations based on review
7. Developing recommendations for sustaining the community⁷

Identify development team and advisory committee

During phase 1 two key groups were formed to guide and contribute to the design and development of the community:

1. Development Team:
This team included members of the eLINC technical support, an “experience designer”, the project manager, and the community coordinator. This team did not hold any meetings as a group. Instead members met separately and through email, and continue to correspond in SCoPE.
2. Advisory Committee
This committee comprised of 8 members including 5 SFU, 1 external, the project manager and the community coordinator. The committee

⁷ This 7th item was not part of the original project plan, but was later added to this list.

met two times, February and July, 2005 to discuss progress. The meetings were useful for discussing ideas for SCoPE. However, it was difficult to organize face-to-face meetings and it was decided at the second meeting that a better format would be ongoing communication and consultation using a private space in SCoPE⁸.

Consultation with prospective participants in the project

In addition to the activities of the Development Team and Advisory Committee, all of the eLINC staff was invited to participate in a full day of discussions about SCoPE. During the morning session the members were divided into four focus groups. Table 1 outlines the main themes and questions I developed to guide the discussion. Following the focus group sessions members were invited to post their top three ideas in a community space set up on a dotproject site⁹ used for managing eLINC projects.

Table 1 Focus Group Themes

Theme	Guiding Questions
Activities	<ul style="list-style-type: none"> • What are some events and services that would make our community unique? • What are some ideas for launching the community? • How do we attract members from a variety of backgrounds and interests? • How do we encourage frequent member participation? • What are the various types of resources that support, or are generated through, the community activities? • What are some tools that would support resource management? • What tools should be available to support these activities?
Community Environment	<ul style="list-style-type: none"> • How can we design to cater to different levels of engagement? • How might metaphors improve engagement in the community environment?

⁸ This space was never used.

⁹ Dotproject.net is open source project management software that was used for a period of time by eLINC staff.

	<ul style="list-style-type: none"> • What are some possible community metaphors (including community names, spaces, and role titles)? • How can we make the community environment welcoming? • How would you validate the acceptance of the community environment?
Sustaining the Community	<p>How do we encourage the building of relationships among community members?</p> <ul style="list-style-type: none"> • How do we create a rhythm of participation? • What are some revenue-generating possibilities for sustaining the community? • How do we effectively communicate to potential sponsors the value of the community? • How can we keep people informed of community activities? • How do we assist new members to feel welcomed and comfortable? • What tools will assist to sustain the community?
Research	<ul style="list-style-type: none"> • What do we need to consider before launching the community if we wish to engage in ongoing research activities? • How might we involve others as researchers in the community (to research the community itself, to involve community members in research projects related to elearning, to share research, to collaborate on research projects) • What tools do we need to support research activities?

The four groups generated a list of top 3 recommendations related to their themes (Currie & Wallace, 2005).

Group 1: Activities

1) *The community needs to be real and familiar to the users.*

For example:

- Much of the information should come from the community members themselves and/or should reflect their experiences.
- Integrate actual case studies.
- Faculty need to be seen as leaders of community.
- The technology used should be familiar to the community members.

2) *We can encourage membership and participation by ensuring the community is quick to access and use.*

For example:

- Use technology that community members are familiar with and are most likely using already.
- Eliminate/minimize the use of technology requiring any set-up, plug-in etc.

- Provide a variety of access points to the community.
- Implement good search tools and good metadata tagging.

3) *The community should be useful.*

For example,

- Content should be brief, concise, and easy to find.
- As mentioned above, include actual case studies / knowledge sharing that reflect community members' experience.

My commentary and interpretation for community design:

The emphasis on the site being practical and efficient combined with the suggestion that content should be contributed by members, really highlights the shortcomings of existing community tools. Often excellent ideas and stories are generated through a discussion, but it becomes quite the task to later wade through the content to find the specific pieces of information.

For example, take the case study idea. If an instructor posts a story about why and how he developed a new grading system, then that post could be tagged with some categories (case, tool, reference, myshelf, etc) and transformed into a valuable resource. Another instructor arrives at the site much later looking for assessment idea, finds the grading tool, uses it, contacts the original developer of the grading tool with some questions about the tool, then contributes a refined tool back to the site. The original resource was generated through a forum discussion, but becomes a reusable resource that can be searched, changed and annotated.

This model leaves the context in which the resource was generated intact, and also makes it available in a new context.

Group 2: Community Environment

1) Design to cater to different levels of engagement

For example:

- experienced designer vs text-based user
- keeners vs apathetic vs hostile
- newsletter
- international flavour (different languages?)
- design for online/offline participation (email, conferencing threads)

2) Metaphors to improve engagement in community

For example:

- cannot be too cutesey
- must have meaning, make sense
- not too culturally oriented - sensitive
- university campus?

3) Make community welcoming

For example:

- email discussions
- meme (shared ideas)
- rich resources, not just links to sites
- resource contributions?
- seed discussions to try to bring people in

4) Validate acceptance of community environment

For example:

- levels of participation
- foster keeners - bring in antagonists/sceptics into discussion
- catch users on first hook
- don't promote on broad scale unless there is demonstrable momentum
(phased release)

My commentary and interpretation for community design

This focus group highlights that we are designing for a broad group in terms of skills, cultural backgrounds, philosophical beliefs, and attitudes. Given

that, we need to consider different elements that will ensure the community environment is inclusive yet appealing to everyone.

The use of site metaphor appears risky. However, metaphors to convey spaces within the community could be helpful, particularly if they are selected by members. The issue of what to name the community remains!

Group 3: Sustaining the Community

1) *Community convener and maintenance person needs to be remunerated.*

2) *Sustaining and project/event funding is required*

For example:

- Sustaining sponsor(s) such as SFU, other universities, Telus, VanCity
- Project/event sponsor(s) such as BCCampus project funds, course fees

3) Community must encourage and be responsive to member ideas and suggestions.

My commentary and interpretation for community design

Each point addresses sustaining the community on a unique level. The community convener has a very visible role – organizing and facilitating events, etc., as well as a less visible role in keeping the community healthy. That role is too complex to easily share with someone else. The maintenance person also obviously has an essential role.

The second point brings to mind the question of timing. Sponsorship dollars are necessary to establish the community as being worthy of sponsorship dollars! We need to develop a “what’s in it for you” list to present to potential sponsors. What are some things this list could include?

The third point, “encourage and be responsive to member ideas and suggestions” is a big one, and we’re in an ideal situation. With so much in-house expertise at eLINC we can be responsive. We need to dream up some ways to encourage ongoing feedback from members. Ideally members should be able to offer these ideas as they come to mind.

Group 4: Research

This group looked at research from two perspectives.

1) *Research that must be done before the community is launched.*

For example:

- Begin with a needs analysis.
- What role or need is out there that this community will fill?
- An examination of how the technology affects the community.

2) *Research once the community is launched and active.*

For example:

- Study the structures and processes relating to 'power' within the community.
- What is required of an individual wanting to gain entrance to the 'community'?
- Once in the community how does that individual gain influence, status and power?

My commentary and interpretation for community design

The 2 perspectives presented by the research group are important and broad. The first description ties in with comments raised during the full group session -- that we need to be using the latest technologies, and be responsive to the changing needs. This “needs” research could (should) also be ongoing research.

The interesting part of community work is that new needs emerge through participation, and sometimes these new needs are identified rather informally. The most useful information can be gathered through participatory and also unobtrusive research methods. For the community environment design, we need to keep in mind the value of having access to the participation data (perhaps ways of tagging messages that are related to design and support needs) and some of the behind-the-scenes activities and patterns of use.

The second perspective, the structures and processes relating to 'power' within the community, is a fascinating topic. One way to look at this is the evolution of roles in the community, from newcomer to gradually taking on new responsibilities, to giving back to the community and becoming involved in sustaining and advancing the community. There are so many factors at play – comfort level, acknowledgement, recognition, identity, power, etc. Gradually members come to understand the culture and become comfortable with the environment (certain actions become internalized).

In planning for research for the SCoPE community there are many questions to be addressed. For example, should we ask members to specify from the beginning their willingness to participate in community research? How can we anticipate and plan for future needs for research in the community?

Session 2

The afternoon session was with the eLINC Technical and Design Team. We discussed community design process, options for tools to support the

community, and lessons learned. This session was an extension of the morning discussions. The following agenda was distributed to guide the discussion:

- 1) Overview of morning session
- 2) Discussion of immediate needs to prepare for pilot
- 3) Discussion: Open Source or Proprietary or both
- 4) Exploration of software choices
- 5) Elements of community life which technology can affect
 - a) Presence and Visibility
 - b) Participation
 - c) Knowledge management
 - d) Membership and Identity
 - e) Evolution
- 6) Next steps in design

Much of the discussion during this session focused on available tools, the pros and cons of building from the ground up, or of customizing existing tools to respond to immediate and emergent community needs.

Several advanced features were identified as necessary to present our community as unique, appealing, and scalable. Also, a recurring theme for the community environment design was to understand needs for newcomers, and that these needs will evolve over time. The group was mindful that members need to be involved in the process and that our design efforts should be focused on the pilot and community launch, with the idea that the community environment will evolve based on participation research and feedback from community members.

It was decided during this session that the community environment would be designed in house, rather than build on existing open source and proprietary software. However, the environment could hook in to existing tools, and the design specifications will reflect recommendations from the research phase.

Literature review

Review of current literature in online community development informed the design of the community. An Endnote database of references was started during this phase (included in bibliography) and continues to be maintained.

Comparative analysis of existing educator communities

An analysis of existing educator communities was conducted in order to address these three questions:

1. What will make our community unique?
2. What can we learn from other communities?
3. How can we build on existing communities and resources?

During this research phase I observed selected communities. These online communities and interest groups have in common that they are of interest to educators, require a subscription, and provide an opportunity for ongoing theme-based discussions. Some communities also organize scheduled group events. Appendix I is an overview of communities by type of platform, target audience, and core activities.

1) What will make our community unique?

Listservs and synchronous events are the most common activities offered in the communities reviewed. Moderated and scheduled asynchronous topic-based discussions (seminars) are surprisingly rare. Of the communities reviewed, the Australian Flexible Learning Community is the only one offering web-based scheduled and moderated asynchronous discussions that are well attended. In other cases where seminars are available, they are not well

supported by the technology. For example, ITFORUM attempts to restrict any casual discussion during the period that a moderated discussion is scheduled. However, so many ITFORUM members are occasional contributors that this protocol is never adhered to, resulting in the need for constant reminders from the list moderator to members that only posts related to the paper being discussed are appropriate.

Management of community knowledge

Knowledge management is an important aspect of community, and this is an area where SCoPE can offer something unique. A well-organized library of seminar summaries and other knowledge objects that result from community activities will both recognize members' contributions and assist in advancing these contributions.

In the planning document, a "writer" was identified as a necessary role. The writer and coordinator could work together to summarize and organize outcomes of community discussions.

Focus on research

A focus on research related to elearning and communities of practice will position SCoPE as a quality environment for learning about and advancing our knowledge of online communities and elearning. Involvement of graduate students in community research, and facilitating discussions about that research, will add a unique dimension to SCoPE.

Experimentation with emergent tools

Another area that does not appear to be a core activity in other communities is experimentation with emergent tools that would be of interest to educators and researchers involved in elearning. Introduction of software prototypes to the elearning community, and an opportunity to participate in the design process through focus groups and various feedback options, would offer a unique service to software developers, as well as opportunity for community members to participate in design.

2) What can we learn from other communities?

Communities that support and encourage members to advance their roles within the community tend to be very vibrant. TappedIn (*Tapped In*, n.d.), for example, offers a help-desk available to new members participating in a chat session for the first time, or interested in setting up an office space. Help-desk staff also offer co-moderator support for members who are new to facilitating discussions.

3) How can we build on existing communities and resources?

As much as possible we want to promote activities in other communities and encourage a mutual exchange of resources. In fact SCoPE could provide a “community watch” service by gathering and publishing information about online events.

An obvious resource exists in eLINC/LIDC expertise and ways to integrate and showcase this talent pool (staff and student work, research, interactive arts

etc) should be explored. In addition, there are a number of resources such as blogs and newsletters maintained by educators and researchers that would add value to SCoPE. Some Canadian examples are:

- Stephen Downes (Downes, n.d.)
- Scott Leslie (Leslie, n.d.)
- George Siemens (Siemens, n.d.)

There is considerable interest in learning objects and the development of repositories to support the exchange of learning objects. A goal for SCoPE may be to provide an opportunity to discuss, and simplify the process of contributing, learning objects. Examples of Canadian projects¹⁰ are:

- Elearning Research and Assessment (*ELERA*, n.d.)
- Edusource (*Edusource*, n.d.)
- Edusplash (*Edusplash*, n.d.)
- BCcampus Learning Object Repository Project (*BCcampus*, n.d.)

A number of journals are available online. A Canadian example is:

- Canadian Journal of Learning and Technology (*CJLT*, n.d.)

Also, there are a number of websites that would support SCoPE's interest in elearning and community research:

- eLearning Reviews (*eLearning Reviews*, n.a.)
Members of this organization review current elearning research publications.
- ALN Research Centre (*ALN*, n.a.)
ALN is a repository of empirical research related to elearning funded by the Sloan Foundation. Membership is free.

¹⁰ At time of undergoing this research these projects were active.

- The Canadian Institute of Distance Education Research (*CIDER*, n.a.)
CIDER is a research arm of the Centre for Distance Education at Athabasca University.

Review of communication and community tools

The process of choosing a suitable platform for the SCoPE community was unexpectedly complex! Our Project Plan provided an overview of the key considerations for technology and access, outlined in chapter 3. However, our preliminary research (Currie & Wallace, 2005) did not yield any existing community platforms that satisfied these most important criteria:

- easy to use
- flexible
- customizable
- good communication tools.

As discussed in earlier, as part of the preliminary research all eLINC staff members were invited to participate in a full day of discussions about SCoPE. Three main topics related to community platforms were discussed among the eLINC technical design team.

1. Immediate needs to prepare for pilot
2. Rationale for choosing open source or proprietary or both
3. Exploration of software choices

Inherent in these topics were preferences around design approaches and the importance of teams and developing a common language. As expected, the technical support staff was the most vocal in this discussion, and they felt that building the software in-house would be the best solution. The basis for this preference was that SCoPE project could benefit from the resources and learning

that had already been invested in the SFU Co-op Learning Community (SFU's Co-operative Education Learning Community). Furthermore, everyone felt that the development of a robust open-source community platform would be a valuable educational contribution.

With the help of eLINC staff, I drafted user requirements in fall 2004. Jason Toal, Experience Designer, in particular, encouraged me to think about the various roles and levels of access and interaction, and to describe typical actions through use case scenarios. The requirements, outlined in Appendix II, are divided into program and user, each focus affording an opportunity to revisit core values and goals, and translating those into look and feel, and functionality.

The user requirements outline basic roles, and several use case scenarios to convey typical user interactions with the community environment. While the scenarios did not present terribly sophisticated interactions, there were several features that did not present themselves in existing platforms. For example, it was important to support the transition from lurker to active participant. At any moment that a visitor to the site feels compelled to contribute to a discussion, there should be a simple process to quickly join/log in, then resume engagement. We felt strongly that members should choose to join SCoPE because they see something of value to them in the community. If potential members are attracted to a topic-based discussion, whether by invitation or incidental, there should be no requirement to undergo administrative tasks like creating user accounts or registering for events before given an opportunity to explore the benefits to them.

The user requirements document also outlines several options for forum participation and subscription to topics of interest. A system that accommodates various levels of participation is important, realizing that a newcomer needs a very basic level of understanding of these options, but a more seasoned community member would be interested in a more advanced level of customization and management.

Overall, the user requirements reflected the recommendations generated through the focus group sessions. At the time, the user requirements document was published in a Wiki we assumed it would continue to expand. However, it was felt that it had enough detail to inform our choices about a community platform. As mentioned earlier, the technical support staff at SFU's eLearning Innovation Centre felt that building the software in-house would be the best solution, especially given that we could benefit from the resources and learning that had already been invested in the SFU Co-op Learning Community (*SFU's Co-operative Education Learning Community*)¹¹. Furthermore, the development of a robust open-source community platform would be a valuable educational contribution. Despite some exciting beginnings in this direction (see Figure 2), the time and resource commitment to software development seemed prohibitive and ultimately the focus turned back to finding an existing platform that would suit our basic criteria. With a continued interest in customization, going with open source software became an important selection criterion.

¹¹ The Co-op Learning Community is built on the open source PostNuke platform. At a presentation at the Nov. 3 2006 BC ETUG Fall Meeting, Stephanie Chu reported that after extensive development and customization it is becoming difficult to remain in sync with software upgrades.

Figure 2 Early mock-up of the community environment prepared by Jason Toal

SCOPE | <user name> | register/login | forum | calendar | Search

general | user-picture | my settings

These items are related

Neighbours
 <user_name #1>
 <user_name #2>
 <user_name #3>
[who else is here?](#)

Groups
 <group_name #1>
 <group_name #2>
 <group_name #3>

Tags
 <tag_name #1>
 <tag_name #2>
 <tag_name #3>

This is the **Profile** for <user name here>



homepage: [www.sfu.ca~toal](#)
 school: [sfu](#)
 role: designer
 country: canada

My tags:

[2002](#) [2003](#) [2004](#) [animal](#) [architecture](#) [art](#) [barcelona](#) [bike](#) [blackandwhite](#) [blue](#) [building](#)
[cameraphone](#) [canada](#) [cat](#) [china](#) [concert](#) [day](#) [dog](#) [europe](#) [fall](#) [family](#) [festival](#)
[flowers](#) [fotolog](#) [fun](#) [garden](#) [graffiti](#) [halloween](#) [sfu](#)

This is the latest activity from [my subscriptions](#)

unsubscribe		1 - 2 of 2
<input type="checkbox"/>	Message: text of message here...	Dec 12
<input type="checkbox"/>	Seminar: Social data mining for elearning.... click for more	Dec 11

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Leave this user a message:

» An **RSS** feed for this page is available at http://scope/rss/<user_name>.

(Toal, n.d.)

The next platform considered was Sakai (*Sakai Project*). As open source software there was potential for customization, and Simon Fraser University had recently become a partner in the Sakai Educational Partners' Program (SEPP). This program was rapidly attracting interest among post secondary institutions, and SCoPE was envisioned as an integrated unit within the community structure that already had an active discussion related to Sakai development. The SEPP project manager agreed to this proposal and a separate SCoPE workspace

within the SEPP project environment was established. However, after experimenting with that arrangement we concluded that the administrative structure was too complex, primarily in the areas of permission levels, registration, and sharing resources and access across worksites required for separate community activities. Expanding to create new seminar discussions could only be achieved by creating additional worksites. This would become problematic for sharing resources across worksites and for providing members easy access to additional worksites. That process proved to be very time-consuming, as well as falling short of serving our needs.

In addition, at that time the Sakai forum tool was not fully developed. In fact, at that time a mailing list was favoured over the forum tool for the Sakai development community. While the model had many advantages, we recognized that the reasons we were considering this platform were more strategic than for how closely the technologies supported our user requirements. The SCoPE workspace remains available for experimentation, much like a separate special interest group.

At this stage we turned to TikiWiki as a possible platform. TikiWiki had recently been selected by LIDC staff for other community projects, such as *Academic Relations* (*Academic Relations*, n.d.), a resource site for faculty¹², and any design and development work could be shared across projects. Aside from being feature-rich and flexible, the structure suited community activities; forums

¹² The *Academic Relations* site began with the goal to provide an online community for faculty, but it remains a resource site, a purpose TikiWiki serves well.

and resources were centrally accessible, and there was potential for a good resource management system.

The discussions about community platform again turned to the resources necessary to prepare for a launch. TikiWiki was by no means an out-of-the-box solution, and with LIDC staff committed to so many community projects, it was clear that the SCoPE launch would be delayed. At that point we returned our original list of options and recommendations for community environment software resulting from our research during Phase 1 of the project (Currie & Wallace, 2005). We had outlined the advantages and disadvantages of building in house, using an out-of-the-box community, or using open source solutions. We had also targeted two open source projects: Sakai and Moodle, yet we had not explored Moodle in any depth.

Moodle stood out as satisfying most of our user requirements. Furthermore, it has a well-established open source community, and is flexible enough to allow members to invent and share new uses. The disadvantage was that it adhered to a fairly rigid course metaphor, and we were concerned that it would also require considerable resources to transform Moodle into a community environment. However, it was clear that it could be our best choice and a proposal was submitted to the eLINC management team.

On June 7, 2005, a full year after the initial project proposal was submitted, we were given the go ahead to develop SCoPE in Moodle. This delay in selecting a community platform seemed like a major setback at the time. Fortunately, Moodle took (literally) 8 minutes to install. I have one of two

administrator accounts, allowing the access privileges necessary to deal with day-to-day operations. Others who have worked on branding and customization have found it to be straightforward, and the site has required very little maintenance by the LIDC technical support staff. So while our search for the appropriate community environment was extensive and drawn out, the flexibility of Moodle and maturity as an open source project meant less time devoted to installation and initial set up. With minimal development resources we have been able to incorporate changes necessary to make SCoPE feel like a community rather than a course space. This is discussed in more detail in chapter 7.

Through this process we certainly learned that it is important to select tools that match your specific community requirements and context. It is also important to be realistic about programming costs to build from scratch, and while there is value in overlapping projects in terms of development, it may not be the most efficient route if each community has specific development needs. Also, if extensive resources are invested in on platform, it becomes even more crucial that an appropriate platform is selected in the first place. And finally, there is no single ideal community platform so it is important to plan for a good foundation to build as new uses and needs emerge.

Engagement in other activities related to community development

During the research phase of the project I engaged in a number of conversations and activities with other people interested in online communities.

Consultation with other community coordinators

I was invited to participate in meetings and behind-the-scenes discussions with members of the Co-op Learning Community team as they prepared for their community launch (*SFU's Co-operative Education Learning Community*, n.d.). The co-op project had undergone an extensive development phase and it was a useful exercise to share resources and ideas and to learn from their experiences. Our meetings were a mutual exchange of ideas and experiences.

A new online educator community was launched fall 2004 through BCcampus (*BCcampus*, n.d.). This community is open to employees in the BC post-secondary education system, and other individuals by request. A meeting with Paul Stacey of BCcampus was arranged to share and compare plans for the BCcampus Ed Tech Community and SCoPE, and to explore ways to bridge our community activities.¹³

Workshops

In the fall, 2004 I joined CPSquare, an online community of practice described as the “town square for connecting leading community practitioners from around the world”¹⁴ (*CPSquare*, n.d.). During September and October I and participated in an 8-week online workshop facilitated by Etienne Wenger, John Smith, and Bronwyn Stuckey. The workshop, Foundations of Communities of Practice, consisted of 32 participants, 12 of whom were returning in the roles of

¹³ BCcampus then launched 2 separate communities, one targeted at BC post secondary educators and the second for vendors and educators from all sectors. We continue to explore ways to work together and bridge community activities.

¹⁴ I was introduced to CPSquare.org by Sus Nyrop, a founding GEN member with an infectious enthusiasm for online communities. Sus, whom I met in person briefly during a TeleLearning•NCE conference, became a friend, mentor, and inspiration.

workshop mentor, network analyzer, or facilitator/coach. The workshop was extremely active and rich with resources, dialogue, and opportunities to learn from experts in the field as well as from people with interesting backgrounds either actively working in online communities or just getting started. Here is an email message sent to my colleague Elizabeth Wallace¹⁵ on September 6, 2004, my first day of the workshop. It captures my enthusiasm and also how I was constantly noticing design elements in the context of my own community design project:

Just started the CPSquare Workshop with Etienne Wenger today. I just want to share one thing that really impressed me. At this site there's a "who's here" feature on the site which individuals can turn off and on. There is also a "send a live message" feature, which is essentially a web-based instant messenger tool. Immediately after I posted my intro message I received a "live message" from one of the volunteer mentors giving me a personal welcome and commenting on my post. Okay, that's really about 5 things that impressed me, but they all add up to a really good way to welcome newcomers.

A particularly memorable and valuable component of the Foundations Workshop for me was a group project. Participants initiated the project topics and groups self-organized according to interests. Naturally I was keen to work on a project related to designing and preparing to host an online community. A group of 5 quickly formed around that theme, and we took a lead from Etienne Wenger to anchor our discussion on the 'design a little practice a lot' rationale. Our group ultimately developed a set of questions intended to encourage consideration of key elements of community design. These questions were framed around design, metaphor, interface, start-up tools, and activities. We then each responded to the

¹⁵ SCoPE Project Manager

questions to create a matrix of design considerations from a variety of contexts.

Table 2 shows the questions we developed, and my responses.

Table 2 Community Design Considerations

Questions	My responses to the matrix
<i>Describe the CoP you are planning for.</i>	eLearning Practitioners (educators, administrators, researchers, developers, students)
<i>What are the boundaries, values and objectives of the community?</i>	To bring together people who share an interest in elearning research and practice, and to offer opportunities for dialogue across disciplines, geographical borders, professions, levels of expertise, and education sectors.
<i>How many members will be able to - and will actually - participate in dialog and activities?</i>	Up to 30 in a single activity
<i>Does the community have a social history and/or a core of members to build on?</i>	There are a couple core groups to build on: 1. Faculty and staff at Simon Fraser University who are currently engaged in similar activities, but not in an online environment. 2) Members of the Global Educators' Network which is no longer active
<i>What technologies will be most effective in serving the communication needs of this community?</i>	To begin with, asynchronous discussions and a resource repository. The resources should be rich... not just links.
<i>Will different levels of member engagement be served by the design and process of the community environment?</i>	Scheduled seminars that are free and open to the public, ongoing discussion spaces for Q&A, project/special interest groups, focus groups, job opportunities,
<i>What will leadership and responsibility structures, training, and incentives look like?</i>	The Project Coordinator will facilitate development and implementation. The Community Coordinator is responsible for the design and day-to-day operations, responding to needs of the community. Individual members will take on leadership tasks. A Writer will prepare summaries, highlights, etc and showcase members' work and discussion outcomes.
<i>What will sponsorship and communication between community and sponsors look like?</i>	To seek sponsorship an outline of benefits to the sponsor will be prepared. This will emphasize the community members and what they have to contribute.
<i>How might metaphors improve engagement in the CoP environment?</i>	We distinguished between site metaphors, and task metaphors in our initial design meeting. The general consensus was that site metaphors can go badly! And that it would not be appropriate for a membership that might be enthusiastic or sceptics. Meaningful task-oriented metaphors will assist with navigation, but must not jeopardize efficiency.

<i>What values and aspects of diversity would you need to consider to arrive at a metaphor(s) acceptable to all?</i>	An international audience is anticipated, so meaningful metaphors will be a challenge. For self-selected groups we attempt to work together to develop metaphors that are meaningful for that group.
<i>List 3 possible themes including community names, spaces, and titles that could be tested.</i>	Centre for Dialogue (a campus building exists with this name) Round Table, JIT (Just in time, for Q&A), Mutual Help (for community/tools help), Brown Bag Session, Development Lab.
<i>How would you validate the acceptance of metaphors?</i>	Involve a group of members in choosing metaphors, and in validating their acceptance. A plan for introducing and validating metaphors will include focus group and issues around metaphors, and other design decisions, will be revisited frequently.
<i>How could you use the communication channels available to members to augment participation?</i>	Options to receive and respond to forum discussion via email, seminar progress updates by email, RSS feeds, event blogs
<i>What options can be provided for people to insure that they get the most possible value from their membership in the community?</i>	Attention to how member contributions are organized and showcased. Some events will be organized as a series to continue to reflect and build on earlier discussion topics.
<i>What is the reasonable amount of time (per day, per week) that prospective members should be asked to spend in active participation?</i>	There will be a variety of activities, and participation expectations will vary. The community activities are organized to accommodate busy lifestyles. Reading along is also acceptable.
<i>What are the minimum and optimum numbers of active participants that will make the community work?</i>	At least 300, which will be a mix of active and occasional participants.

In June 2005, four members of the Learning and Instructional Development Centre received funding to participate in a 4-week Online Communities in Higher Education workshop offered through iCohere (*iCohere*, n.d.). The timing for the workshop was ideal because we had just selected Moodle as a platform and had begun planning for launch. During this workshop we were able to work directly in our prototype environment and envision the design. One project required that we create several personas and write a community newsletter dated one year into the future (Wallace, Severson, Dayes, & Currie, 2005) Figure 3 shows the newsletter portion.

Figure 3 A fictitious newsletter

Education Matters Your SCOPE Community Newsletter June Issue, 2006

In This Issue

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1. Community Reflections Series: It *is* who you know!
2. New Member Profile
3. Upcoming Events
4. Gems from the Tip Meister
5. All About EM

1. Community Reflections Series: It *is* who you know!

Never in her wildest dreams did Taffy Williams think her job search would end the day it started, nor did she think her work would allow her to spend so much time with her family in her home town of Swansea. Taffy reflects on her introduction to SCOPE. "I stumbled upon SCoPE through Stephen Downe's blog, and proceeded to browse some of the past discussions and events. I knew immediately that I was in the right crowd. It just felt right...friendly, open, enthusiastic, people discussing big issues and ideas in education." Taffy created her account and profile, and posted an introductory message in the Gazebo, highlighting her immediate purpose for joining: To find work! "The rest is history" Taffy reflects. "It turned out my desire to find work was shared by hundreds of members. The surge of responses to my post resulted in a new discussion area just to talk about job searching, and how our ideas about jobs and careers are beginning to shift. We found that most people really didn't want jobs, they wanted work."

But how do you go about finding work when most leads are to 9 to 5 jobs in a concrete building? Taffy's interest in this question shaped a business plan for Net Working, a company that offers tools, services, and community support to individuals seeking work that doesn't require relocating and commuting. "The model emphasizes peer-to-peer support and sharing through social networking tools such as weblogs, RSS, de.li.cious, furl, and so on. It's an astounding success! Just like SCoPE, it builds on the idea of members helping members. This is proof -- when it comes to advancing in your profession, it *is* who you know." Taffy conducts weekly tours of Net Working here in SCoPE. Check out the community calendar for details.

2. New Member Profile

Sam Roberts is a graduate student and teaching assistant at Super Duper University. He recently joined the online community in the hopes of finding some quick ideas to improve his teaching this semester, but most of all he is interested in learning from more experienced instructors. Sam jokes, "A million dollars goes to the first person who can summarize all this social constructivist learning theory business in one page! People keep telling me that the answers to my teaching dilemmas will come from a better understanding of learning theory, but I'm having a hard time getting up to speed quickly." Fortunately for Sam, he has already connected with a SCoPE mentor from Fun and Fabulous University. We can be sure there won't be a million dollars exchanged! We all look forward to an update from Sam as he prepares for the next semester.

3. Upcoming Events

insert calendar feed

4. Gems from the Tip Meister

Bernie Hart has volunteered to take on the role of keeping our Monthly Technical Tip column alive. So many members have expressed their appreciation for these tips that give them instant ideas for implementation into their teaching and community life. Bernie muses that of all people, he has become the Tip Meister: "A year ago I was a 2-finger typist, and not a very good one at that! Now people are knocking on my door asking for ideas to engage their students, to manage project work, to prepare for engaging synchronous sessions, you name it." Bernie has developed a passionate interest for advancing elearning practice and research. "I'm just fortunate to have the time to pursue this passion, and help others who share it."

bla bla bla tips tips tips

5. All About EM

Education Matters is a monthly community newsletter. To read past issues or subscribe bla bla bla bla bla bla Please distribute freely bla bla bla bla bla bla bla

This exercise was useful for documenting several things we were hoping to achieve:

- A developmental model for roles within the community.
- Clear value to community members.
- Showcase achievements in the community.
- Mutual exchange of sharing and services.
- Take advantage of emerging technologies.
- Create a warm and welcoming atmosphere.
- Rely on word-of-mouth to promote what we do.

The current SCoPE newsletter: MicroSCoPE is very similar in format to this prototype. As part of the iCohere workshop we also reviewed and analyzed a number of cases. It was useful to review communities as visitors and address some basic questions, such as: How are decisions made in this community? How would you characterize the community's culture? The SCoPE team had demonstrated a variety of prototyping experiences and we were selected to present at a future iCohere workshop so that our experiences could become a case for others to study.

Summary

This chapter documents a very busy year of planning. The activities I engaged in were sometimes repetitive, but involved different stakeholder groups. The early planning and research provided reassurance that we were on the right track. We developed a project plan that followed a traditional model phased approach, the first being research. An advisory committee, typical of university projects, was established to guide our work. While the input from the committee was valuable, the meetings were few and far between, and became more of an opportunity to report on progress and to test our ideas than to seek guidance for next steps. Concerns about the lengthy research and design phases were expressed early on. However, the process of selecting a platform proved to be very involved and one year after drafting the original project plan we still had not launched the community.

CHAPTER 5: WE'RE UP AND RUNNING!

The fuzziness of phased planning

This SCoPE community process began with the goal to fill an obvious void left by the closing of GEN, a popular community which was unable to sustain itself past the end of funding from Canada's TeleLearning Network of Centres of Excellence. With the pilot of the new community approaching, we reflected on the issues that emerged during the community research and design phase. Key areas include selecting appropriate technologies, the pre-launch design process, defining the community purpose (i.e. whether or not to focus on elearning and how much the SFU community is included in the main purpose), and creating a bridge from an inactive community. After a lengthy planning process we were ready to launch.

The phased planning provided an anchor for our work and enabled us to chart progress. However, we found ourselves editing the plan to match the reality of design work. The project plan had undergone several revisions, each with adjustments to the milestones and redefining the notion of a pilot. The revision process also highlighted the overlap of the phases. Even the phases themselves had been renamed and items within the phases shuffled around. For example, the "Marketing and Implementation" phase became "Launch and Development". It was clear that design does not simply occur as a section of a plan! The research phase was very much about design. A pilot allows for evaluation of the

preliminary design, but so does full implementation. We learned that design is constant, and it is also about many things.

This messy notion of the community design is reflected in the vocabulary and metaphors used to describe this process. Some prefer language that suggests communities are grown, nurtured, and cultivated rather than developed, created, or built (Kim, 2000; Stuckey, 2004; Wenger et al., 2002). The separation of the early stages of development (planning and launching) from mature stages of development (growing and sustaining) provides a manageable framework, and situates design as an ongoing process (Wenger et al., 2002). Stuckey (2004) proposes a new framework for developing internet-based communities that, like SCoPE, do not have organizational affiliations¹⁶. She refers to “waves of influence and action” as developers design, implement, and sustain community, and although chronology and developmental stages are still necessary, the waves are interrelated (para. 24).

What is clear from our experiences and from the literature, community work requires ongoing engagement in the design process. As Stuckey advises: “Sustenance of the community begins the day it opens” (Stuckey, 2004, para. 27). Attention to continued observation, reflection, and engagement of members shaping the community is essential. How have we done that?

¹⁶ I mean this in the sense that we are not building a community of practice solely around SFU interests or the interests of other specified institutions.

Figure 4 Excerpt from the first MicroSCoPE newsletter October 17, 2005

1. Welcome Message

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Welcome to SCoPE and the first issue of MicroSCoPE! From the minute SCoPE was up and running on a production server 8 weeks ago, we opened the doors, people wandered in, and together we began testing and designing. The front page of SCoPE displays this message: "We are still organizing the community site, so expect surprises". We plan to change this to "We are *\*always\** organizing the community site, so expect surprises!" A vibrant community is always evolving and responding to needs as they emerge. We are only just beginning to get the word out, but already SCoPE is a direct response to members' feedback generated through participation. We look forward to your future involvement in shaping our community environment and activities!

### **Continued engagement**

Since SCoPE launched in fall, 2005 we have continued to engage in a number of activities to further our understanding of effective strategies for implementing a community.

### **SCoPE discussions about SCoPE**

SCoPE began in fall, 2005 with a "Next Steps" discussion on the development server. (In retrospect it should have been called "First Steps"! ). The purpose of this discussion was to brainstorm initial activities and directions for the community. This 3-week seminar yielded excellent suggestions, many of which continue to be realized. Through a "community interior decorating text chat session" and our forum discussion, we made decisions about the initial site layout and the organization of resources and activities. Also, we identified several seminar topics and activities, and some members even offered to facilitate discussions that early on.

We also held a vote on the name SCoPE for the community, and it was decided once and for all that the name would remain. It was becoming urgent because we needed to establish a domain name. Until that point there had been many internal discussions about a name for the community. A wiki page was set up to solicit ideas, as shown in figure 5.

**Figure 5 Brainstorming names for the community**



This Next Steps seminar proved to be a very effective way to begin shaping the community environment and decide on topics for discussion.

Following this discussion we moved to a production server.

Ongoing discussions about the community are encouraged in the “SCoPE Suggestion Box”, and as mentioned throughout this report, this has provided a good opportunity for feedback and ideas for improving our community experiences. Also, feedback and suggestions often more naturally belong within the context of other activities.

## **Vancouver rendezvous**

In October 2005 SCoPE and CPSquare (*CPSquare*, n.d.) worked together to organize a gathering of community enthusiasts<sup>17</sup> to coincide with the eLearn conference<sup>18</sup> in Vancouver. We created a “Vancouver Rendezvous: Before and After” forum in the Community Enthusiasts Special Interest Group in SCoPE to address the logistics of the event and to formulate a plan that would make the afternoon interesting and engaging for everyone. Participants were invited to bring a case, preferably as a one-page handout, and a particular issue or developmental questions (SCoPE handout, Appendix III). Others who were not involved in a community project or who were more interested in just listening were also warmly invited. The case could be loosely framed to include community purpose, what we are doing, what we would like to do, what we have done. John Smith, the rendezvous meeting facilitator, proposed the following format:

### **Format:**

- Quick introductions by everyone: 5 minutes
- Case presentation 10 minutes
- Following each case presentation participants are restricted to clarifying questions only. No suggestions or feedback are permitted at this point
- The case presenter then poses a question to the group. The question is either predetermined, or formulated as a result of the clarifying question
- The group then provides suggestions related to the question

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<sup>17</sup> Community Enthusiasts is the name of the SCoPE Special Interest Group (SIG) for individuals interested in learning about cultivating and sustaining online communities. Paul Stacey, a SIG member, suggested the name for the group which was originally called Community Coordinators.

<sup>18</sup> An Association for the Advancement of Computing in Education conference

Twenty people participated in the event, ranging from individuals who declared they had just learned about CoPs to others who had considerable experience working with and facilitating online communities of practice.

The discussion following the SCoPE presentation focused on ways to sustain an open and free community. The main suggestions generated through the discussion were:

- Find ways to engage senior level administrators to participate in community activities.
- Ensure there is a core group of SFU members involved while continuing to present SCoPE as an international community.
- Collect stories that will defend and advance the community.
- Find ways to measure the influence of the community on individuals and groups (i.e. at other institutions).
- Remind everyone of the values of community.

Following the rendezvous, participants shared notes<sup>19</sup>, posted photos on flickr.com, and continued to exchange ideas in the Community Enthusiasts special interest group in SCoPE.

### **Summer 2006 Brainstorming session**

On July 26, LIDC staff members were once again invited to join in a focus group discussion about SCoPE. This afternoon session was structured as a full group brainstorming session, followed by a strategy planning session by a pre-identified sub-group. 13 people participated: 8 at the Burnaby campus, 4 by

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<sup>19</sup> There was an agreement that specific details of cases would not be shared online.

speaker phone from the Surrey campus, and one member submitted ideas in advance. Participants had the option of expressing their ideas orally or through the SCoPE text chat which was projected on the screen in the main meeting room. All LIDC staff were encouraged to submit their ideas through email after the session was over. The rules of brainstorming were not followed rigidly; both questions and discussion were permitted.

The suggestions generated through the session were later framed into categories.

**Audience**

This was mostly an affirmation that we understood who are audience is. However, the need to engage SFU members was once again raised.

**Activities**

Suggestions for activities included: 1) discipline-based CoPs (using the SIG format), 2) offer SCoPE as a venue for groups currently using listserv technologies that could benefit from resource sharing and other features to support collaboration, 3) coordinate an “experts network” for peer support, 4) try out different formats such as synchronous and asynchronous combinations, and 5) increase research activities.

**Promotion and liaisons**

Items in this category were reminders that we are focused on teaching and learning in general and not on elearning, Also, participants expressed a need to think about new ways to distribute information about SCoPE, such as blogs, brochures, new faculty packages, and promotional packages for conferences.

**Sharing and managing resources**

This was identified as an important development piece. A resource management solution would be a big contribution to the field of community of practice development and research, and to the moodle.org open source

community. Also, an in-house project within LIDC to compile teaching and learning resources could be organized through SCoPE.

### **Sustaining SCoPE financially**

Items in this category tied in very closely with promotion and liaison. The first step is to become established, then various options can be explored. The challenge with institutional support is that projects considered essential services are given priority.

Following the brainstorming session the sub-group debriefed and formulated an action plan. It was clear that membership was growing steadily, there was evidence through members' praise, willingness to volunteer, and interest in advancing SCoPE that the community was maturing. The action plan focused primarily on sustaining SCoPE financially, and identifying research opportunities that were worth pursuing. Aside from funding issues, it was felt that SCoPE development was on track.

Focus group sessions with members of the Learning and Instructional Development Centre have been very productive. These engagements are important for sustaining interest and keeping everyone up-to-date within the institution. As a web-based community with an active international participation, it is easy for local connections to weaken.

### **Online Facilitation Workshop**

In January, 2006 I enrolled in the Online Facilitation Workshop offered through Full Circle Associates (*Full Circle Associates*). My introductory message to the community posted on January 30, 2006 summarizes my reasons for and excitement about taking the workshop:

I feel so fortunate to be here! I've been planning to take this workshop, and working toward making it happen. I had one snag left to work out -- a time conflict with a conference; I would be travelling and flat out busy during one of the workshop weeks. Then...fate. The conference was cancelled! So here I am! Yay! And bonus — I see familiar faces.

I decided I should choose a photo with a little Canadian content. You see people wandering the Rocky Mountains in these tilley hats. Not exactly fashion - forward, but functional. Very Canadian.

I work from home in a little bit of paradise in British Columbia -- a tiny community called Lac le Jeune. I work at odd hours so I can get outside during the daylight hours. These days it's mostly to x-country ski and to kick sled with my 3-legged Sheltie.

My favourite work is coordinating a relatively new online educator community called SCoPE <http://scope.lidc.sfu.ca>. The main activity in SCoPE is scheduled and moderated seminar discussions. I hope this workshop will help me in my role as community coordinator, and also to help me to prepare upcoming seminar facilitators.

What brings a smile to my face? Okay, something you should know about me. I am an absurdly happy person, so I'm always smiling and laughing. It might be the mountain air, excellent friends, no broken bones, and Purdy's english toffee. What makes me cranky? Too much chair time all at once.

There were 33 participants from a variety of backgrounds and countries and through this workshop some lasting relationships developed, some which carry on in SCoPE and other venues<sup>20</sup>. It was a very active workshop organized around themes for discussions, practice groups, personal (but open to other participants) learning logs, and a cybrary of resources. For one activity I chose a design exercise to review collaborative book project that was just starting up at the BCcampus eLearning Marketplace and Expo Online Community (*BCcampus eLearning Marketplace and Expo Online Community*). SCoPE offered a public

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<sup>20</sup> Past participants are invited back to future workshops as mentors. At time of writing I am a mentor in a workshop which focuses on facilitators and Web 2.0 technologies.

space for publishing information about the project<sup>21</sup> to invite interest from prospective writers. We also offered SCoPE as an optional venue for forming chapter groups, discussing progress, and sharing drafts. For this activity I used the Online Community Builder's Purpose Checklist (White, n.d.). The questions in this checklist prompt for exact details on how you plan to organize your community project and how to engage members. Some of the issues with the collaborative book project identified at the time were choice of tools for specific tasks, and lack of transparency in the planning process. Much of the communication was occurring through private email, and live Elluminate sessions. For these modes of communication to be effective in a collaborative project involving a large number of people, there should be summaries available for the benefit of members who are engaged more on the periphery. Also, a project space where milestones and progress can be held in common view is essential. This was a valuable exercise for understanding the complexity of collaborative projects in an online community of practice.

### **Ongoing participation and community pulse checks**

The organized activities described above are a useful way to engage interested parties in focused discussions that generate concrete recommendations. It is interesting to note that to date we have not conducted surveys, which may seem like an obvious method of soliciting feedback from SCoPE members. However, Kim cautions that "people are notoriously

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<sup>21</sup> BCcampus Expo, while open to the public to create accounts, does not offer an option to publish information in a non password-protected area.

inaccurate at self-reporting” (Kim, 2000). She suggests listening to conversational feedback and relying on behavioural feedback such as page hits, time spent on the site, and statistics.

The logging and observations Kim refers to can only be done by paying close attention to the day-to-day activity on the site. This is time-consuming, but without a doubt the most fruitful method of understanding ongoing needs.

Successful community building is a constant balancing act between the efforts of management (that's you) to plan, organize and run the space, and the ideas, suggestions and needs of your members. To manage this co-evolution, you'll need to keep your finger on the community pulse -- and you'll do this by creating and maintaining feedback loops between members and management. These loops will keep you in touch with what your members are saying and doing, and give you the information you need to evolve and update your features and platform. (Kim, 2000)

I realize now after nearly two years have passed since launching the community, that maintaining a journal of these pulse checks would have been a very valuable practice. So much of what I do as community coordinator is difficult to explain; it's simply a matter of noticing things. But how do I explain the process I use as I sift through hundreds of forum posts and email messages each month? What causes me to pay attention to certain clues buried in posts that there may be user interface issues? Why would I choose to review a certain user's activity report to understand patterns of interaction? That is a project for the future, but here I can offer some examples.

Table 3 shows a selection of annotations I have publicly made using *Marginalia* (*Marginalia Web Annotation*). (*Marginalia* is discussed further in chapter 7). Occasionally, there are indicators within the context of seminar

discussions that people are having difficulties interacting with the SCoPE site. Some of these indicators are more subtle than others. In some cases participants may not be aware of a feature available to them, and the solution is to draw attention to it. For example, questions posted to forums about formatting text, navigation, and managing forum subscriptions have become topics in the “Tips to improve your SCoPE experience” section in the MicroSCoPE, a newsletter to advise members of current and upcoming activities in and around the community. In other cases, suggestions may lead to changes to the site. Other examples in Table 3 are comments I have flagged for follow up, such as request to continue a discussion past a seminar end date. There are also expressions of appreciation, and indicators that our format is indeed working. Marginalia as a tool has obvious benefits for someone in my role who is needs to be mindful of the development needs of the community (Kim, 2000; Wenger et al., 2002).

**Table 3 Marginalia Annotations by Community Coordinator**

| <b>Seminar Discussion Thread</b>                | <b>Selection of text from forum post</b>                                                                                                                                                                                         | <b>My annotations</b>                                                       |
|-------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------|
| Re: Accessibility and Course Management Systems | <i>I hope that through this online seminar that we can also continue to keep an archive of user testing/tips (wiki?) that we have tried at our own institutions so that this can be shared around.</i>                           | request for continuing past seminar                                         |
| Re: Blog programs                               | <i>if you find how to change the formatting on this forum to plain text</i>                                                                                                                                                      | add tip to next newsletter -- can change this setting in profile            |
| Debriefing Potpourri . . .                      | <i>I cannot find it now (!@#\$\$%^#\$\$% Moodle), but in</i>                                                                                                                                                                     | search in Moodle difficult?                                                 |
|                                                 | <i>with Marginalia (which I have come to love.) We have freedom to start new threads. This leads to wild west at times. But it is MUCH better than being locked down as in another Moodle interaction area I am a member of.</i> | kudos to marginalia and appreciation of being able to start new discussions |

| Seminar Discussion Thread                                     | Selection of text from forum post                                                                                                                                                                                                                                                                                                                                                                                                                                     | My annotations                                                                                                                                                                 |
|---------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                                                               | <i>But Christie's post talks about Momentum and Trust , Cathy and Sarah about community .Â It it's real community, it will be there next month for another episode. From Re: Debriefing our Informal Learning discussion here in SCoPE by cathybray on Thursday, 1 June 2006 8:54:00 a.m.: surfing around the campfire discussions on informal learning</i>                                                                                                           | exemplary use of smart copy for moderating. Use in SCoPE tips for moderators!                                                                                                  |
| Re: Debriefing our Informal Learning discussion here in SCoPE | <i>Maybe my settings were off, but I couldn't easily tell new stuff from the old. Navigation was frustrating .</i>                                                                                                                                                                                                                                                                                                                                                    | old and new posts, mulitple discussions, features/settings for occasional visitors to the site (different from newbies!)                                                       |
| Re: Debriefing our Informal Learning discussion here in SCoPE | <i>Looking back, I would like to have pulled those ideas into a new thread so that that conversation would have stood alone as a focus.</i>                                                                                                                                                                                                                                                                                                                           | Ability for all participants to split a discussion? Or at least knowing it's a possibility to ask for it to be split                                                           |
| Re: Debriefing our Informal Learning discussion here in SCoPE | <i>So - I'm glad to have joined. Better late than never</i>                                                                                                                                                                                                                                                                                                                                                                                                           | Format of welcoming newcomers at any time                                                                                                                                      |
| Re: Debriefing our Informal Learning discussion here in SCoPE | <i>Threads that may have life left in them Seminar. Get some proposals for the four-fifteen possibilities, have a quick vote, ressurect some of them with a pair of hosts for each (just let Sylvia do all the mega-host stuff) and see what happens.</i>                                                                                                                                                                                                             | Interesting idea. In many ways we do this -- new topics emerge from discussions. Voting...something to think about. Would we really have that many people willing to moderate? |
| Re: Debriefing our Informal Learning discussion here in SCoPE | <i>Perhaps just adding a question/box/choice at the end of this reply screen that I am using might help: "Would you like to add this to the existing thread or start a new thread?"</i>                                                                                                                                                                                                                                                                               | prompt for mindful participation. Nice idea!                                                                                                                                   |
|                                                               | <i>As others have said, perhaps looking at the way the threads were tracked, responded to, grouped, etc. would have made it easier to follow the discussion. Sometimes people changed the topic headings in a thread (including me) without starting a new thread. Would it help that if an extension heading was added to the parent thread, the thread would continue but if the parent heading changed a new thread would automatically begin? (or something?)</i> | thread issue Moving topics, reorganizing, protocol                                                                                                                             |

| Seminar Discussion Thread                                         | Selection of text from forum post                                                                                                                                                                                                                                            | My annotations                                                                                                 |
|-------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------|
| Re: Debriefing our Informal Learning discussion here in SCoPE     | <i>I would like to add my suggestion of searching threads by key words (or maybe we can &amp; I just didn't know?) I've been going back to the home page and clicking from there. David's notes have helped (really appreciated that, David!!!).</i>                         | search not obvious                                                                                             |
| Examples and Resources                                            | <i>I didn't notice a wiki set up yet for this forum</i>                                                                                                                                                                                                                      | assumption there will be a wiki for every forum                                                                |
| Re: getting things started                                        | <i>On a different note, I wish there was some way to move this thread to "Current Challenges". That may not be an accessibility issue, but it's a usability issue. What would be really nice would be the ability to cross tag topics and replies within multiple areas.</i> | Note feedback on forum usability. This is similar to requests to create topic clusters from Virtual-U research |
| Re: getting things started                                        | <i>There's so much good information being exchanged...it's awesome.</i>                                                                                                                                                                                                      | evidence of value                                                                                              |
| Re: Hi from Yorkshire UK and differences between forums and blogs | <i>Perhaps one use of a wiki would be to delegate the task of collating, summarising and reporting on the major themes and issues that emerge,</i>                                                                                                                           | suggestion for use of existing tools                                                                           |
| Re: Knowing Knowledge - Foundation/Purpose Questions              | <i>[As a little aside, shouldn't a cut and paste bring with it the reference due to the wonders of Marginalia?]</i>                                                                                                                                                          | follow up with Geof.                                                                                           |
| Re: Knowing Knowledge - Foundation/Purpose Questions              | <i>Been lurking asynchronously, but my activation threshold has been reached and I have to jump in with some desultory comments.</i>                                                                                                                                         | Power of the periphery                                                                                         |
| Re: Mentorship                                                    | <i>As you will read from my posts, our focus in this forum is the Scholarship of Teaching and Learning, particularly in Higher Education, and if there are any developments in that field in your province, it would be good to hear about it.</i>                           | trying to redirect focus, disregard for new directions                                                         |
| mindmapping marginalia etc                                        | <i>I think it would be useful to have a section on scope itemising such tools and their uses, and maybe a time/forum could be provided for people to suggest and discuss them.</i>                                                                                           | idea for kaieidoscope? Or is this a SIG. Hmmm.                                                                 |
| Re: mindmapping marginalia etc                                    | <i>especially the idea of a forum, as that could be running all the time</i>                                                                                                                                                                                                 | follow up to see best way to provide this ongoing sharing                                                      |
| Re: Online Facilitation - the current landscape                   | <i>See why I am promoting and proposing the development of www.yebo.org ??? Pax, Azania</i>                                                                                                                                                                                  | Is this spam? Check                                                                                            |

| Seminar Discussion Thread                                                                               | Selection of text from forum post                                                                                                                                                    | My annotations                                                                                                                                                                                                                                  |
|---------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                                                                                                         |                                                                                                                                                                                      |                                                                                                                                                                                                                                                 |
| : Online Facilitation - the next 10 years (where do we go from here?)                                   |                                                                                                                                                                                      |                                                                                                                                                                                                                                                 |
| Re: Live chat breadcrumbs - transparent facilitation                                                    | <i>I find it quite hard working through all the threads to find the nuggats! But may be that is my lack of skill</i>                                                                 | Managing resources. A wiki seems like the best solution for this. It can be updated by everyone, but perhaps each seminar should have a person assigned to maintaining, reminding participants when they contribute to add it to the wiki, etc. |
| Reflecting on the technical stuff and turning it into a wish list                                       | <i>What amazes me is that this is the first time since we launched SCoPE that we've heard a few gripes about features and interface!</i>                                             | Experience level of users in this seminar -- not novice users, but more advanced. So far SCoPE has worked quite well for novice users.                                                                                                          |
|                                                                                                         | <i>I miss some features I've seen in other tools where you can view ALL posts in a forum by date, subject heading, author, etc, and view full messages or just subject headings.</i> | RSS will bring in all messages chronologically, but is limited to the last 50 I believe                                                                                                                                                         |
| Storytelling around informal campfire                                                                   | <i>Forgive me for starting yet a new fresh campfire forum as I would not really know where in the structured Moodle environment to share my pleasant story</i>                       | note Moodle forum issue. The reply/new discussion problem again.                                                                                                                                                                                |
| Re: The Vital Value of Blogging in Higher Education Teaching.                                           | <i>Canadian blogging conference Northern Voice next week in Vancouver</i>                                                                                                            | Possibility for f2f rendezvous!                                                                                                                                                                                                                 |
| Re: Welcome . . .                                                                                       | <i>I couldn't resist coming aboard as I was receiving your posts to my mailbox you were all making such valuable and valid comments, Ive decided to join in.</i>                     | pros of "subscribe initially"                                                                                                                                                                                                                   |
| Re: What happens when things really do change? Rethinking the design of an online facilitation workshop | <i>n ongoing discussin about this, perhaps here in SCoPE or elsewhere.</i>                                                                                                           | A SIG? or maybe a discussion in Community Enthusiasts                                                                                                                                                                                           |
| Why Bother? - Selling the Benefits                                                                      | <i>Somewhere someone, not being able to easily find the who/where of that</i>                                                                                                        | Example of member not using search /annotation/ subscribe to manage participation? Notice frequently starts new discussion thread.                                                                                                              |

Log files are another way to discover trends and possible issues with the community environment design. At the beginning of a new seminar I usually do random checks on members that have logged into SCoPE but not contributed. From the log files I can see if they subscribe or unsubscribe to the forum, select RSS, check the facilitator's profile, and so on. If I notice a member logging in to unsubscribe at the beginning of each seminar, I might email that person to outline some other options for managing interactions with the site, such as switching to forum digests.

Equally as important as what is observed within the community is what hasn't occurred. Feenberg and Bakardjieva (2004) refer to the virtues of community: loyalty, respect, self-control, fairness, civility, sincerity, truthfulness, and tolerance, and question how realistic it is to "expect these virtues to manifest themselves in cyberspace" (p.5). The SCoPE environment certainly lends itself to possible misuse. However, in two years there have been no instances of inappropriate behaviour – no instances of spam, flaming, domination, or even posts that are off-topic. In fact, despite the advice repeated in most guidelines for developing online community, we have yet to create community guidelines that outline a process for dealing with inappropriate behaviour. Such guidelines should be created through discussions with members. However, we would need to invent possible instances of inappropriate behaviour to get a conversation started.

Other noteworthy examples are that there have only been 3 requests for passwords, 2 requests for assistance in creating an account, and 1 request to

have an account deleted. And most astonishing, despite the fact that SCoPE's seminar discussions are open to the public, the number of active participants in each seminar seems to adjust itself. There has never been a need to introduce a registration system to cap the numbers of participants.

## **Summary**

This chapter provides an overview of progress since launching the community in fall, 2005 and activities that have enhanced our understanding of what contributes to a successful community and how to monitor needs and anticipate next steps. The next chapter is a snapshot on evolution – where we are now and how are we doing.

## CHAPTER 6: SNAPSHOT OF EVOLUTION

### Who are we?

In less than two years SCoPE membership has grown to 1,080 representing 43 countries (table 4). The account creation form only requires name, email address, and demographic information. Fields to enter additional information about place and nature of work is optional<sup>22</sup> so we are lacking comprehensive profiles of our membership. Members have declared themselves as educators in K-12 and post-secondary, corporate trainers, graduate students, teaching and learning support staff in a variety of contexts, researchers, and curriculum developers. The need to collect more comprehensive information about our members is an example of where a survey would be valuable.

**Table 4 Members by Country June 9, 2007**

|           |     |              |    |
|-----------|-----|--------------|----|
| Argentina | 6   | Malaysia     | 1  |
| Austria   | 1   | Netherlands  | 6  |
| Australia | 65  | New Zealand  | 15 |
| Belgium   | 2   | Nigeria      | 1  |
| Brazil    | 9   | Philippines  | 2  |
| Canada    | 662 | Poland       | 1  |
| China     | 2   | Puerto Rico  | 1  |
| Columbia  | 8   | Portugal     | 2  |
| Germany   | 4   | South Africa | 6  |
| Denmark   | 2   | Spain        | 6  |
| Ethiopia  | 1   | Sri Lanka    | 2  |
| France    | 2   | Sweden       | 3  |

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<sup>22</sup> This is intentional so that creating an account is a quick process and does not detract from the activity the visitor was engaged in at the moment s/he decided to become a member.

|           |   |             |     |
|-----------|---|-------------|-----|
| Greece    | 2 | Switzerland | 1   |
| Hong Kong | 4 | Thailand    | 1   |
| Ireland   | 1 | Turkey      | 1   |
| Israel    | 2 | Taiwan      | 2   |
| India     | 4 | Ukraine     | 1   |
| Iran      | 1 | UK          | 44  |
| Iceland   | 6 | US          | 166 |
| Italy     | 2 | UAE         | 1   |
| Japan     | 1 | Wales       | 2   |
| Moldova   | 1 |             |     |

As mentioned previously, these numbers only represents those who have elected to create an account on the SCoPE site. The number of participants involved in the periphery is difficult to calculate. Guest views<sup>23</sup> have exceeded 100,000 on the SCoPE main page, indicating interest in SCoPE activity by non-members. Other indicators of interest include blog posts and discussions outside of the SCoPE. For example figure 6, a sampling of blog activity where authors link to SCoPE, demonstrates the international interest, as well as appreciation for what SCoPE has to offer. Blogging activity also captures an interesting view on seminar meta-discussions; contributors are extending their reflections to their own blogs and inviting further commentary. Individuals also choose to read SCoPE discussions using an RSS Reader. Given that SCoPE is an open access environment, and new technologies such RSS enable access in different ways, it is impossible to compare growth and popularity to the earlier GEN community which required that an account be created to enter the site.

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<sup>23</sup> Visitors to the site are automatically logged in as guests when entering group spaces. Therefore, main page logs indicate visitors who have done more than view the main page. Some guest views represent existing members who have not logged in.

Figure 6 Google blog search



## What are we accomplishing

As of June 22, 2007 there have been over 3,700 forum posts to SCoPE discussions. This is a relatively high volume compared to other online communities reviewed in the phase 1 research. For example, the BCcampus EdTech Community (*BCCampus EdTech Community*, n.d.) shows 581 posts since fall 2004, and LearningTimes (*Learning Times*, n.d.) which has been in

existence since 2002, has 15,372 members, and a proportionately small number of discussion posts at 2,400<sup>24</sup>. These comparisons are not meant to imply competition in any way, but are mentioned here to illustrate that the activity level SCoPE is relatively high. It should be noted too that both BCcampus EdTech Online community and LearningTimes offer many synchronous events and a private mailing list option, so there are other activities that these members are engaging in.

## **Measuring up against the 7 Principles for Cultivating Communities of Practice**

Most people involved in online communities are familiar with the following 7 Principles for Cultivating Communities of Practice and how this framework is useful for guiding community design decisions.

1. Design for evolution.
2. Open a dialogue between inside and outside perspectives.
3. Invite different levels of participation.
4. Develop both public and private community spaces.
5. Focus on value.
6. Combine familiarity and excitement.
7. Create a rhythm for the community.

(Wenger et al., 2002)

This section follows this set of principles to reveal the thinking behind the design of SCoPE and how it measures up. This elaboration demonstrates how factors other than user requirements can influence decisions about the selection

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<sup>24</sup> This is information that is available to all community members. More detailed participation data is only available to site administrators.

of technologies and how "communities and technologies shape each other" (Wenger et al., 2005, para. 2). Selected examples illustrate how members contribute to shaping the community and to reinforcing design decisions.

### **1) Design for evolution**

"The key to designing for evolution is to combine design elements in a way that catalyzes community development" (Wenger et al., 2002, p. 53). The initial preparation of the SCoPE site was intentionally minimal in order to facilitate opportunities for the members to shape the environment. As mentioned in chapter 5, the community was launched with a scheduled discussion called "SCoPE: Next Steps". At that stage there were no content or graphics on the site, and even the name SCoPE was tentative.

Where are we in the evolution of an online community? Our immediate goal was to attract members who are interested in education research and practice, and to connect with individuals who are interested in sharing their knowledge and expertise by moderating scheduled seminar discussions. We have certainly achieved that, and there is a strong commitment to continue with moderated seminar discussions as the core activity in SCoPE. Seminar discussions offer something unique and fresh topics build anticipation from one month to the next.

To date we have organized 18 seminars on a variety of topics (see table 5). In most cases the topics have been proposed by members. In all cases members have volunteered their time to facilitate the seminars, some investing

considerable effort in planning, consulting on facilitations strategies, and in preparing summaries. SCoPE has clearly evolved into a culture that values the mutual exchange of ideas, resources, and time; in two years 28 members have volunteered to facilitate seminar discussions.

**Table 5 Summary of Seminars**

| <b>Seminar</b>                                                     | <b>Dates</b>                   | <b>Posts</b> |
|--------------------------------------------------------------------|--------------------------------|--------------|
| Personal Learning Environments                                     | June 4-24, 2007                | 130          |
| Supporting and Advancing Online Dialogue                           | May 7-27, 2007                 | 85           |
| Serious Games and Virtual Worlds                                   | April 4-24, 2007               | 216          |
| Learning the Art of Online Facilitation                            | March 1-21, 2007               | 249          |
| Blogging to Enhance Learning Experiences                           | February 12-25, 2007           | 452          |
| Knowing Knowledge                                                  | January 10 - 30, 2007          | 74           |
| Accessibility of eLearning:                                        | December 4 - 17, 2006          | 193          |
| The Use of Open Source and Free Software in Education              | November 6-26, 2006            | 130          |
| The Educational Value of Podcasting                                | October 4-22, 2006             | 95           |
| Informal Learning                                                  | May 15 - June 4, 2006          | 340          |
| Designing and Sustaining Virtual Communities for Teachers          | June 15-July 7, 2006           | 19           |
| Enhancing and Extending the Classroom through Learning Communities | April 24-May 10, 2006          | 70           |
| Talking the Walk: Narratives of OLC                                | March 22-April 02, 2006        | 75           |
| The Role of Online Communities in Developing the SoTL              | February 17 - March 5, 2006    | 38           |
| Panda Walks Into a Bar                                             | January 17-February 5, 2006    | 46           |
| WebCT & Blackboard Merger                                          | November 21-December 4, 2005   | 63           |
| The Dance of the Instructional Designer                            | October 31 - November 20, 2005 | 104          |
| Next Steps                                                         | August 8 - September 2, 2005   | 68           |

Special Interest Groups (SIG). SIGs are where most of the activity takes place outside of the seminar discussions area. They are formed in response to suggestions from community members and have been introduced gradually. Some of these groups are for focused projects, and may come to an end when the project is finished. For example special areas have been set up to accompany face-to-face conferences and workshops for the duration of the event. Other SIGs are intended to support ongoing dialogue and resource sharing based on interest. Table 6 shows SIGs, events, and special projects.

**Table 6 Special Interest Groups, Events, and Projects**

|                                                       |                                                                                                                                                                                                   |
|-------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Blogging to Enhance Learning Experiences Book Project |                                                                                                                                                                                                   |
| <i>public</i>                                         | During the February 2007 seminar discussion on blogging we decided an obvious next step would be to write a book together. This SIG is our workspace for the book project.                        |
| Teaching and Learning Readers' Group                  |                                                                                                                                                                                                   |
| <i>public</i>                                         | Members of this SIG select books related to teaching and learning to read and discuss as a group                                                                                                  |
| Accessibility of eLearning                            |                                                                                                                                                                                                   |
| <i>public</i>                                         | Special Interest Group (SIG), moderated by members of the Adaptech team, for individuals interested in the use of computer, information, and adaptive technologies by students with disabilities. |
| Faculty of Education Field Programs                   |                                                                                                                                                                                                   |
| <i>private</i>                                        | Online meeting place for teachers and mentors in Field Programs, SFU - Faculty of Education                                                                                                       |
| Community Enthusiasts                                 |                                                                                                                                                                                                   |
| <i>public</i>                                         | This is a gathering place for community coordinators, hosts, cultivating and sustaining online communities to share resources, experiences and opportunities.                                     |
| Simon Fraser University                               |                                                                                                                                                                                                   |
| <i>public</i>                                         | This Special Interest Group provides the opportunity for SFU faculty and staff to explore topics of particular interest to our university.                                                        |
| TechOne Redesign                                      |                                                                                                                                                                                                   |

|                                                                         |                                                                                                                                                                                                                                                                                                                                                                                                                              |
|-------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                                                                         | This is a working space for curriculum developers in SFU's TechOne Program.                                                                                                                                                                                                                                                                                                                                                  |
| University/College/Institute Professional Development (UCIPD) Committee |                                                                                                                                                                                                                                                                                                                                                                                                                              |
| <i>private</i>                                                          | The UCIPD SIG is a working and thinking space for members of British Columbia's University/College/Institute Professional Development group. UCIPD is a loosely knit community of professionals who are involved in educational development in British Columbia. Many people have worked very hard to maintain the network. This site is offered as a vehicle for building closer ties and facilitating the growth of UCIPD. |
| Symposium on Innovative Teaching                                        |                                                                                                                                                                                                                                                                                                                                                                                                                              |
| <i>public</i>                                                           | The Symposium on Innovative Teaching is held each year at Simon Fraser University in May. The theme for 2006 was Dialogue in Teaching and Learning: An Educational Framework for Linking Coursework and Community. After the conference we continued to explore the challenges and rewards associated with dialogue-based learning as an innovative practice in pedagogy.                                                    |
| Collaborative Online Book Project: Teaching and Learning Online         |                                                                                                                                                                                                                                                                                                                                                                                                                              |
| <i>public</i>                                                           | This is a book project coordinated through the BCcampus eLearning Marketplace and Expo Online Community. This book is a practical guide for faculty with an emphasis on demonstrating exciting opportunities offered by new technologies and outlining step-by-step how you can use the Internet to improve the educational quality of your teaching.                                                                        |
| UBC Okanagan 2nd Annual Learning Conference Open Knowledges Exchange    |                                                                                                                                                                                                                                                                                                                                                                                                                              |
| <i>public</i>                                                           | Participants from the UBC Okanagan 2nd Annual Learning Conference and others were invited to join this forum on open knowledges exchange.                                                                                                                                                                                                                                                                                    |
| TechOne Open Course                                                     |                                                                                                                                                                                                                                                                                                                                                                                                                              |
| <i>private</i>                                                          | This is an open area for members of the TechOne program to experiment and discuss program redesign.                                                                                                                                                                                                                                                                                                                          |
| SCoPE Research                                                          |                                                                                                                                                                                                                                                                                                                                                                                                                              |
| <i>private</i>                                                          | This is a private space to organize SCoPE community research activities                                                                                                                                                                                                                                                                                                                                                      |
| Queensland University of Technology - Teaching Projects                 |                                                                                                                                                                                                                                                                                                                                                                                                                              |
| <i>public</i>                                                           | This is a special interest group for faculty members at Queensland University of Technology who are exploring the possibilities of online communities of practice for advancing their work.                                                                                                                                                                                                                                  |
| TeleSCoPE                                                               |                                                                                                                                                                                                                                                                                                                                                                                                                              |
| <i>private</i>                                                          | This is where selected members plan and discuss site administration, configuration, customization, upgrades, and all those other topics that fall under the technical side of things.                                                                                                                                                                                                                                        |

Early on we identified an interest in pursuing and supporting research activities related to online communities. Members have been actively brainstorming ideas and seeking funding opportunities for research and development. For example, an action research project designed to advance SCoPE and to contribute to research on communities of practice in higher education is in progress. Also, SCoPE is offered as a venue for researchers interested in studying online communities. Research activities catalyze community development and there is a mutual benefit between the community and the researcher. These initiatives are raising new questions related to virtual ethnography (Feenberg & Bakardjieva, 2001; Hine, 2000) and how we should prepare for future research projects.

## **2) Open a dialogue between inside and outside perspectives**

“Good community design requires an understanding of the community’s potential to develop and steward knowledge, but it often takes an outside perspective to help members see the possibilities” (Wenger et al., 2002, p.54). I am fortunate to have had many opportunities to engage in conversations about SCoPE through participation in workshops, meetings, conferences, and other communities. As described in chapters 4 and 5, much of this dialogue has been focused specifically on SCoPE, as well as online community design in general. Also, as an active member in other online communities and events I am always exposed to new ideas to bring back to SCoPE.

Occasions to show and describe SCoPE at conferences and respond to questions from people who have had no exposure to the community (and in some cases to any community) act as a heuristic for rethinking design. For example, I was recently asked what I have found is the best time to schedule seminar discussions given that members are from so many different time zones. It dawned on me that nowhere on the site does it mention that the seminar discussions are asynchronous.

### **3) Inviting different levels of participation**

This principle addresses participation on many levels: providing different ways to participate, allowing different levels of commitment based on time and interest, and encouraging members to take on new roles in the community (Wenger et al., 2002).

Participation in SCoPE is flexible and inclusive. In the public seminars, members may choose to participate by reading along rather than activity contributing to the discussion. There is no formal registration process for events, and once the session begins there is no obligation to participate on a regular basis, or to even continue.

Each topic invites both experts and novices to contribute. For example, a seminar discussion held in May, 2006 on informal learning attracted participation from a recent book author on the topic. In that same seminar other participants were wondering what the term “informal learning” means. This open format can lead to a fruitful discussion. “Experts” who are completely immersed in a topic are

asked to explain their work to people who may be unfamiliar with the basic concepts, resulting in opportunities to examine and rethink their ideas.

In addition, the community environment is intuitive for newcomers. At time of writing there had been no requests for assistance to carry out basic functions such as posting to forums and updating profiles and preferences. There has been only a handful of requests for help logging in. At the same time, a more seasoned community member may take advantage of the more advanced features to customize and manage their participation.

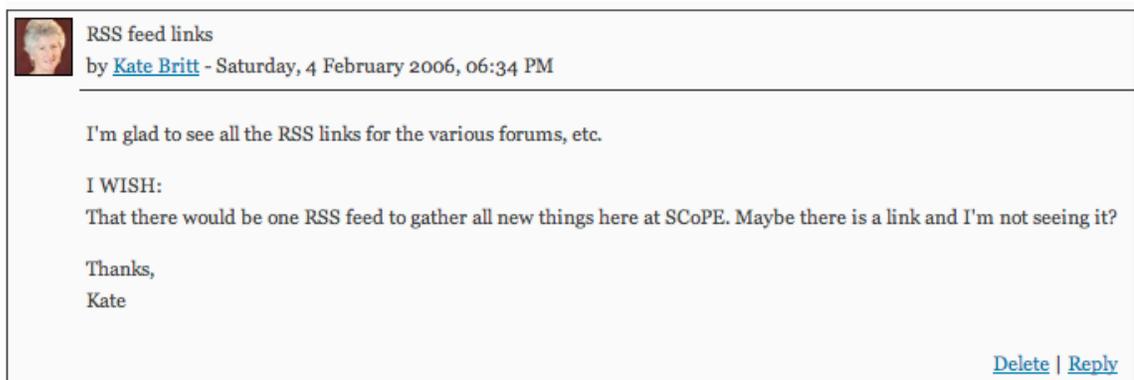
There are various options for reading member contributions to the community such as RSS feeds from each forum, and the option to subscribe to individual forums by email. These options fully support and encourage lurking behaviour, which allows individuals an opportunity to become acculturated and ease in gradually if that suits them. There are “unspoken rules in every long-standing community, and ...if you don’t spend some time just reading posts, observing how members of the community interact, you run the risk of barging in like a bull in a china shop” (Sandra & Spayde, 2001, p.167). This open format accommodates busy professionals, and members choose to join a discussion when they feel compelled and have the time. Obviously, not all seminar topics are going to appeal to everyone, but many members choose to read along to keep one ear on the discussion. As Wenger et al point out “successful communities build a fire in the centre of the community that will draw people to its heat” (Wenger et al., 2002, p.58). The scheduled seminar discussions are clearly

the “heat” in SCoPE. There have been many cases where members have entered a discussion declaring that they could no longer resist the temptation:

- “Been lurking asynchronously, but my activation threshold has been reached and I have to jump in with some desultory comments.” Corrie Bergeron - January 26 2007
- “ I've been following this conversation in RSS but you've wormed me out of the woodwork!” Linda Hartley - June 21 2007

Currently there is only an option to subscribe to RSS feeds from individual forum discussions. Figure 7 is a suggestion for a site-wide feed posted to the community Suggestion Box, an idea that would provide a convenient and effective method for inviting different levels of participation. Also, RSS calendar tools would allow for broad sharing of events among members and across communities.

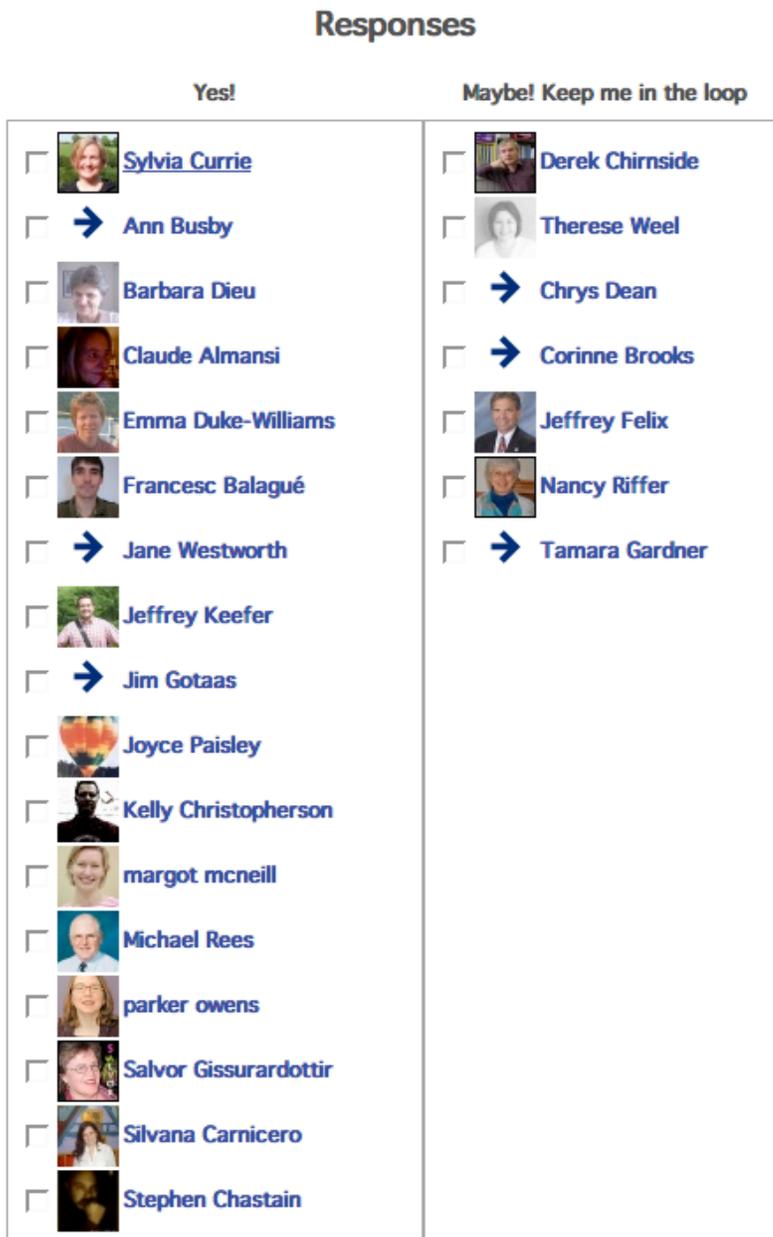
**Figure 7 A wish posted to the SCoPE suggestion box**



During scheduled discussions there have been requests to continue the dialogue past the seminar end date. One member suggested that all scheduled discussions remain open for afterthoughts, a format which we immediately adopted. In addition to moving the forum to a separate section called “Past

Seminar Discussions” I added to this title “...but always open. Afterthoughts encouraged!” Even though there is typically very little activity after the scheduled end date, members know there are more options. Perhaps that is the main purpose; it’s not that members will take advantage of the feature but they like knowing that they can if they choose. As mentioned earlier, in some cases special interest groups are formed to provide an opportunity for ongoing conversation or projects. Figure 8 shows a poll to determine interest in a book project following the “Blogging to Enhance Learning Experiences” seminar. This book project is now underway using Wikispaces.com. Introducing focused projects and new ways to interact add variety and sustain interest.

Figure 8 Poll to determine interest in writing a book together



An interesting dilemma we faced early on in the community was how to serve the needs of the SFU community (as outlined in our project goals), yet at the same time present SCoPE as an inclusive community -- extending community activities and invitations for participation to an international

audience<sup>25</sup>. We made a conscious effort to portray SCoPE as community hosted by SFU, but not hosted for SFU. SCoPE's tagline "*an open, online community for people like you*" is intended to present an open invitation for anyone who is interested. Calendar events and discussions of interest only to the SFU community are posted in a separate SIG. As of May 30, 2007 19% of the membership is from SFU (as indicated by email address) and further work is needed to create awareness about SCoPE among SFU faculty and staff.

Communication trends among education professionals point to more use of blogs and social networking software. Spontaneous thoughts, questions, observations, opinions, and announcements are posted to personal blogs or in response to other blog postings rather than in a single community venue (White, 2006). SCoPE members are also active in other communities. This cross-pollination of published ideas and dialogue presents both interesting opportunities and challenges for fostering different levels of participation. Experimentation with available social networking platforms such as EduSpaces.org, Facebook.com, and ning.com has provided new insights into how we can engage members in different levels of participation. Casual conversation and providing new ways to connect by interests and experiences help to build more and stronger relationships.

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<sup>25</sup> I raised this question in the SCoPE: Next Steps seminar at community launch. My favourite response was from Cindy Xin, translating from Chinese: "Walk with both legs"

#### **4) Developing both public and private spaces**

Wenger et al caution against focusing too much on public events. A community coordinator needs to engage in “informal “back channel” discussions (Wenger et al., 2002). “The key to designing community spaces is to orchestrate activities in both public and private spaces that use the strength of individual relationships to enrich events and use events to strengthen individual relationships” (p.59).

SCoPE is a combination of public and private spaces. Scheduled Seminar Discussions, the Community Library, and KaleidoSCoPE are all public. In addition, selected project groups and special interest groups are public and members are free to join and unenrol as they please. The private spaces include:

- Special interest groups with a closed membership, such as the University/College/Institute Professional Development (UCIPD) Committee
- TeleSCoPE, where discussions related to site upgrades and customization take place
- Metaforums, where seminar facilitators talk about their experiences
- Faculty CoPs, such as the Faculty of Health Sciences
- Practicing teachers enrolled in the Teaching and Learning in an Information Technology Environment (TLITE) diploma program at Simon Fraser University
- One-to-one messaging

As new ideas and requests for separate groups emerge, the issue of creating private space is always revisited. While there are obvious reasons for restricting access to certain groups, such as TeleSCoPE where server security could be in jeopardy with public access to discussions, there are many examples

where discussions could be far richer if there were opportunities for broader input. Here is an example:

The seminar discussion format has provided opportunities for advancement of roles within the community – from participant to facilitator. As community coordinator, I provide behind-the-scenes support for the volunteer moderators to help with planning, and to discuss progress and offer suggestions. We have also begun a tradition of debriefing seminars. Facilitators are asked if they would like to spend some time reflecting on the seminar, and if so who they would like to include in the process. A private “metaforum” is set up for this purpose. These debriefing sessions have turned into very rich dialogue that will help to inform future SCoPE activities, and in many ways it's a disadvantage that they aren't shared openly. In fact, one debrief developed into a discussion about how to go about conducting debriefs, and naturally this would have been a good topic for all members to engage in.

During a seminar discussion in May and June, 2006, the facilitators made a behind-the-scenes decision to start a new “public debrief” thread in the seminar. The outcome was mixed: One member felt that this action essentially killed the discussion. Another member who had not yet participated felt compelled to comment on her observations, so in her case the debrief became her entry into the community discussion.

On the other hand, a private space affords more candid discussions. Members feel safe in a private discussion space. I often engage in email correspondence with members on topics that could easily be shared in the

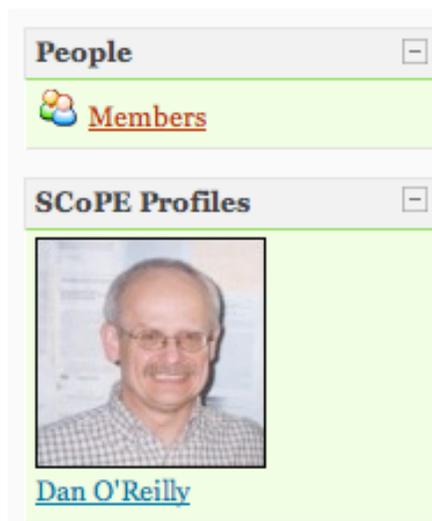
community. It is difficult to find a good balance, but to be sure some private space is desirable. It is important to constantly question the value of keeping a discussion private, and the risks of inviting wider participation. As community coordinator, I see my role as bringing relevant feedback and ideas forward to advance the community while maintaining confidentiality of the private discussions that members choose to have.

### **5) Focusing on value**

“Rather than attempting to determine their expected value in advance, communities need to create events, activities, and relationships that help their potential value merge and enable them to discover new ways to harvest it” (Wenger et al., 2002, p.60).

SCoPE exists to bring together individuals who share an interest in educational research and practice. The purpose of bringing them together is to interact, and to share and construct resources related to practice. The community site, then, is about people and relationships first, and this is figured somewhat into the site design. The main page features random member profiles (shown in figure 9), access to the full list of members, and information about who is online, or has been online recently. Also, some members choose to provide detailed information about themselves in their member profiles.

**Figure 9 Random member profile**



In the initial design of SCoPE, every effort was made to provide several opportunities to communicate and to share resources in different contexts. For example any resource file type can be attached to forum posts during a seminar discussion or in an open-ended forum such as “Your News” in the Community Library. There are several archived resources that accompany forum discussions, such as transcripts from text chats, conference calls, recorded webcasts and webinars, and support documents provided to anchor the discussion.

Through SCoPE discussions a number of “outcome” resources (shown in table 7) have been created. These include wikis to gather key points alongside a seminar discussion and final summaries in other formats. In some cases seminar summaries are posted directly in the forum. Also, there are several archived resources that accompany forum discussions, such as transcripts from text chats, conference calls, recorded webcasts/webinars, support documents, and resources contributed as attachments and links as part of the discussions.

**Table 7 Outcome Resources Generated through Community Discussions**

| <b>Format</b>   | <b>Resource Title</b>                                                                                                          |
|-----------------|--------------------------------------------------------------------------------------------------------------------------------|
| <b>Wikis</b>    | Personal Learning Environments                                                                                                 |
|                 | Supporting and Advancing Online Dialogue                                                                                       |
|                 | Serious Games and Virtual Worlds Resource Collection                                                                           |
|                 | Learning the Art of Online Facilitation                                                                                        |
|                 | Blogging to Enhance Learning Experiences: Examples and Resources                                                               |
|                 | \$200 or Less List: Free and Inexpensive Adaptive Software                                                                     |
|                 | Open Source and Free Software in Education                                                                                     |
|                 | Online Learner Collaboration Annotated Bibliography                                                                            |
|                 | Our Collection of Podcasting Resources                                                                                         |
|                 | Scholarship of Teaching and Learning Annotated Bibliography                                                                    |
|                 | Story Telling Projects                                                                                                         |
|                 | Informal Learning Resources                                                                                                    |
|                 | Key Elements of Good Stand-Up Comedy...er I mean Webcasts                                                                      |
|                 | The Dance of the Instructional Designer: Our Greatest Insights                                                                 |
| <b>PDF</b>      | Serious Games and Virtual Worlds                                                                                               |
| <b>Mindmaps</b> | The Value of Serious Games and Virtual Worlds                                                                                  |
|                 | Learning the Art of Online Facilitation                                                                                        |
|                 | Blogging to Enhance Learning Experiences                                                                                       |
| <b>Books</b>    | Blogging to Enhance Learning Experiences (Collaborative wiki book in progress)                                                 |
|                 | Narratives of Online Learner Collaboration (used in a chapter in a book project organized through BCcampus Online Communities) |

A few repositories<sup>26</sup> were introduced to see how they would be used, such as a start on a collection of webcasts in the community library. From the beginning we were mindful that our service to the community should be to provide opportunities and to model how resources can be added and created rather than decide which resources would be of interest to members. As stated by John Smith, technologist and coach at CPSquare.org, “Resources does not a community make”.<sup>27</sup>

However, for the resources we produce and share in the community to be of value to members, we need to find ways to provide efficient methods of

<sup>26</sup> In Moodle a “repository” can be created using the Glossary or Database tools which allow for all users to contribute entries.

<sup>27</sup> From my personal notes taken during the CPSquare.org Foundations Workshop

organizing and retrieving them. This is becoming an urgent issue in SCoPE. Also, our initial ideas that members would be willing to take extra steps to add content to a repository, and to share ideas, information about events and newsworthy items on an ongoing basis were off the mark. As mentioned, increasingly individuals are relying on blogs and RSS to keep up-to-date and to share and discuss current issues. Likewise, sharing and annotating Internet resources is easily accomplished through social bookmarking.

It seems each time we visit the need to organize communal resources, we see new possibilities that are more efficient and very different from traditional file folder metaphors or containers for gathering resources into one place. Figure 10 shows what I refer to as the collection of bad decisions – a space we originally referred to as the “community library” where members were expected to share their resources. Resource collections that are maintained outside of SCoPE and tagged for specific purposes and topics would obviously be more useful than a general Del.icio.us Bookmarks tag called SCoPE, or special place to upload links to podcasts and webcasts. Note that the forum in the library for members to post ideas about how to organize that space has never used, which is a clear indicator that there is little interest or need to maintain a community library of external resources.

Figure 10 The collection of bad decisions, captured April 4, 2007

The screenshot shows the PERISCOPE website interface. At the top is the PERISCOPE logo in blue. Below it is a message: "This space is getting a major overhaul! Things will look out of place for awhile. 😊". Underneath are four menu items with icons: "Your News", "Organizing our Community Library", "Podcasts", and "Webcasts and Streamed Media".

The main content area is divided into three numbered sections, each with a title and a list of links:

- 1 Finding Conferences and Other Events**
  - Education Technology and other Education Conferences
  - Conference Alerts - Receive email updates of conferences that match your interests
  - Conference Listings from CIDER
  - T.H.E. Conference calendar
- 2 Our Del.icio.us Bookmarks**

Add the tags "elearning" and "elinc" to del.icio.us bookmarks you would like to share in SCoPE

Click for "SCoPE Community Bookmarks". By Feed Digest
- 3 Search, Review, and Discuss Scholarly Literature**
  - Google Scholar: Search for Scholarly Literature
  - Acatopia: Ask Questions About Books You Are Reading
  - shelfari: A personal and social bookshelf
  - RSS feeds to track the latest articles from journals
  - Open Access Journals in the Field of Education

Many seminar topics emerge from current events, such as the 2006 WebCT-Blackboard merger, or from discussions in the community. The request for a seminar on “Supporting and Advancing Online Dialogue” emerged during an earlier seminar on instructional design. Likewise the idea for the “Personal Learning Environments” seminar came about during the seminar “The Use of

Open Source and Free Software in Education”. Other seminars coincided with and supported other scheduled events, such as Simon Fraser University’s Symposium on Innovative Teaching and selected webinars. A seminar called “Talking the Walk: Narratives of Online Learner Collaboration” served the purpose of collecting stories related to personal experiences with online collaboration, some of which will be published in a book – a writing project taking place in the BCcampus eLearning and Marketplace Expo community. The seminar topics, then, are directly connected with the lives of the members, rather than through an administrative process of selecting topics that might be of interest to members.

Perhaps the clearest indicator that SCoPE is providing value to its members is seen through expressions of appreciation and willingness to return, such as this one: “SCoPE is such an amazing learning environment. See you on the 4<sup>th</sup>!” (Ian McLeod, 2 April 2007)

## **6) Combining familiarity with excitement**

Successful communities combine familiar routines with “enough interesting and varied events to keep new ideas and new people cycling into the community” (Wenger et al., 2002, p.61). As mentioned, the core activity for SCoPE is scheduled seminars facilitated by members of the community. Topics for the seminars emerge through participation, and from the backgrounds and interests of our members. These seminars establish a routine, but with new topics each month there is always something new and fresh to build expectations.

SCoPE activities are often organized in collaboration with other communities and events. For example the snapshot of front page community (figure 11) highlights University of Manitoba's Future of Education online conference. As a mutual exchange of services and appreciation, I designed and maintained the Moodle environment for the conference. A seminar on the Educational Value of Podcasting was scheduled in tandem with other community events to form a "Podcasting Camp", a theme initiated by the BCcampus Online Communities. BCcampus and SCoPE also worked together to launch SCoPE's Professional Reading Group Series, combining Elluminate sessions hosted by the BCcampus EdTech Community and asynchronous discussions hosted by SCoPE. A companion online discussion area was created to continue to the dialogue begun at Simon Fraser University's 8<sup>th</sup> Annual Symposium on Innovative Teaching. In 2006 SCoPE was the organizing sponsor for the 2<sup>nd</sup> Annual Knowtips.ca conference, responsible for recruiting and supporting presenters at a separate venue altogether. Members and potential members presented at the online conference on the following topics:

- Technologies for Communities, with Etienne Wenger, Nancy White, and John Smith
- Collaborative eLearning: Feedback and Assessment, with Janet Salmons
- Open Networked Learning, with Leigh Blackall
- Games and Sims, with Rod Corbett
- Social Software: Going Beyond LMS Systems for eLearning, with Terry Anderson
- Facilitating Deepened Online Learning, with Sarah Haavind and Marsha West
- Memorization, with Bruno Vernier

- Training Practitioners Online to be Online Practitioners, with Kate Anthony
- The Attic, with Shula Klinger

Collaboration with these other communities both brings in new interest to SCoPE, and provides variety to our members.

**Figure 11 Snapshot of the main page highlights section June 4, 2007**

**SCoPE brings together individuals who share an interest in education, research and practice.**

- Our current seminar is **Personal Learning Environments** June 4-24 with **Derek Chirnside** and **Derek Wenmoth**
- The **Future of Education** online conference runs June 4-8, 2007
- The **Supporting and Advancing Online Dialogue** seminar facilitated by **Cindy Xin** is winding down.
- Welcome all newcomers from the **Society for Teaching and Learning in Higher Education!** You and everyone else are invited to participate in the Knowledges Exchange forum in **KaleidoSCoPE**.
- SCoPE is the recipient of the **BC 2007 Innovation Award in Educational Technology** 😊
- Thank you to **Jonathan Nodrick**, interactive designer, for our beautiful SCoPE community theme and graphics collection!
- Join the Blogging to Enhance Learning Experiences **book project**
- Welcome all members of SFU's Teaching and Learning Readers' Group. Your follow-up discussions will take place in your **new SIG**.
- We're busy planning our upcoming seminars. Check **Scheduled Seminar Discussions** for topics and dates.
- Please keep making **suggestions** !



SCoPE offers an ideal venue for showcasing new education technology software and for beta testing. By using a familiar environment (Moodle) for organizing our activities we can integrate and experiment with other technologies that support our work as a community, or that we may use in our teaching and

learning practices. For example, during the last 18 months SCoPE members have been using Marginalia Web Annotation (Xin & Glass, 2005). Marginalia provides a means for members to collect and revisit notes while participating in SCoPE discussions. It is also a valuable research tool, and is especially useful for moderators to flag and follow up on key contributions and emerging themes in a discussion. Use of new tools such as Marginalia provides valuable feedback to developers and also attracts new members. We continue to integrate and hook into tools that will help to improve our SCoPE experience and teaching practices. Maintaining a home base that is familiar helps to manage this experimentation.

## **7) Creating a rhythm**

“If the beat is too fast...people stop participating because they are overwhelmed. When the beat is too slow, the community feels sluggish” (Wenger et al., 2002, p.62). The core activity for SCoPE is scheduled, topic-based seminars moderated by volunteers in the community. So far we have scheduled one seminar per month, usually 3 weeks in length, and have avoided overlap in the schedule. A regular format helps to build anticipation each month, encourages members to revisit the community, and also invites participation from new members who are interested in the topic.

All seminar discussions take place in one group<sup>28</sup> space on the SCoPE site. By organizing the discussions this way, members are able to easily enrol and unenrol from the seminar group. In addition, if they have their preferences

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<sup>28</sup> In Moodle we have changed the course label to “group”. A group is a gathering place based on topic and format.

set to receive forum posts by email, each new seminar discussion is pushed to their email inboxes until such time they choose to unsubscribe. This has proven to be an effective means to promote a seminar and build interest. If it were left to members to decide to participate based on a short description, or take an extra step to register, there would likely be fewer active participants each month. However, this method can take some people by surprise! Here Derek Chirside enters the discussion scratching his head about how he got there. Interestingly, Derek goes on to be one of the most active discussants in the seminar.

“Well, I'm not exactly sure how I ended up in this discussion, but I am here. Did someone subscribe me?? Who is here? Is there a list? has someone got a plan for my life??” (Chirside, 2006).

MicroSCoPE (*MicroSCoPE newsletter*, n.d.), a monthly update on community and member activities, is distributed through the site announcements forum. This newsletter includes upcoming events, a recap on past events, and information about SCoPE members' activities and achievements such as conference presentations and awards. Any questions about the community tools that affect participation are noted, and replies are included in MicroSCoPE. Following each MicroSCoPE issue, there is an increase in activity on the site. However, inasmuch as a monthly newsletter contributes to a community rhythm, a SCoPE community blog would provide more timely updates. A blog does not reach the same audience as a community newsletter, so we are investigating ways to produce and manage both.

## **Summary**

This chapter captures our progress in attracting members and in shaping our community to suit their needs. Aligning SCoPE's evolution against the 7 principles for cultivating communities of practice (Wenger et al., 2002) provides an interesting framework for both patting yourself on the back and also for identifying areas that require further attention. The next chapter looks at progress with SCoPE's technical development.

## **CHAPTER 7: SQUEAKS AND TWEAKS**

During the research phase of SCoPE development it became apparent that there were no ideal community platforms. Moodle was selected because it satisfied many of the user requirements we had outlined: It is open source with a well-established development community, and is flexible enough to allow members to invent and share new uses. Moodle has proven to be a suitable platform for community activities. However, Moodle is designed to be used as a course management system, and work was (and still is) needed to transform this into a community platform. Further work was also needed to create a look and feel that is inviting and unique.

As a follow up to the action plan developed during the July 26 brainstorming and strategic planning session, I drafted a Technical Development Plan (Currie, 2006) which, based on participation in SCoPE for one year, outlined the main areas of technical development that would bring us closer to an attractive and robust community platform. It was stressed in the document that all development work should involve community members in testing and making decisions about future enhancements. This chapter outlines the sections of that Technical Development Plan with commentary on progress.

## **Site customization**

### **Themes and graphics**

Moodle provides several options for “themes” with various combinations of fonts, colour schemes, and icons. It is possible to use one theme as a starting point to create a new local theme for the site. In addition, there is a setting to allow users to choose a session theme.

Community members have been engaged in discussion regarding a SCoPE logo. This dialogue combined with a community poll to vote for favourite designs has provided some useful guidance for a graphic artist. To date clip art has been used to add context to different areas within SCoPE. A set of images to support a community theme and the selected groups unique to SCoPE would contribute to a consistent and meaningful look and feel.

### **Recommendations:**

- Develop a SCoPE theme, or possibly a selection of themes for users to choose from
- Provide an option for PDA as a session theme (i.e. an option to choose this them during a given session using a handheld computer)
- Ensure all themes satisfy web accessibility standards
- Design a selection of 3 logos and host a final poll
- Incorporate the favourite logo(s) into the themes (mentioned above)
- Develop images that convey that the community is about people and dialogue
- Develop a selection of images suitable for the special interest groups and activities we support.

## **Update and commentary**

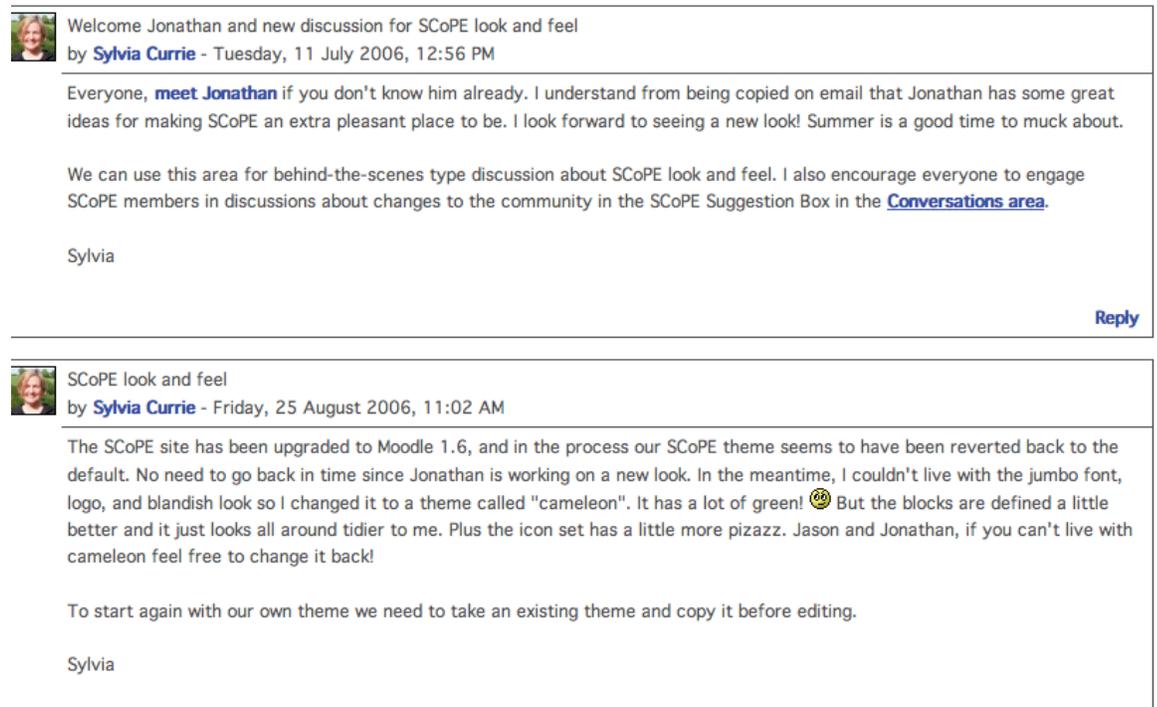
For the first year or more SCoPE used a theme available as part of the Moodle installation, and we also experimented with different colour schemes and font choices. Beginning with the community launch SCoPE members were involved in discussions about logos. Several ideas about colour schemes and logos were posted in the SCoPE suggestion box, including an opportunity to vote on logo choices.

However, much of the discussions around themes occurred in the private TeleSCoPE space and via email. By early spring 2006 we had undergone many changes and conversations about the look of the site, and through the process of updating the themes we experienced several usability problems. I received private email from members asking for assistance on issues such as disappearing login links, and poor colour contrasts that affected navigation. But generally members were very tolerant of site changes and were ready and willing to experiment and offer advice, and we certainly learned a lot in the process! So although the ongoing customization work was somewhat tedious and at times nerve racking, it was also exciting and helped to present SCoPE as community-oriented, a place without the usual hang-ups about looking glossy and professional.

The delay in creating the theme work was mostly related to workload issues, and in July 2006 LIDC managers committed funds to working on the look and feel of SCoPE. Jonathan Nodrick, an interactive designer in LIDC was assigned to the project. There was a further delay as SFU went through some

institutional branding changes and there was uncertainty about whether or not SCoPE would have to adhere to those guidelines requiring a very standardized use of images and layout across SFU departments. It was a relief to eventually learn that we were free to create our own branding and image for SCoPE. Our interest was to attract international and widespread participation in the community and a layer of SFU branding would have clearly made it difficult to achieve that goal. Figure 12 shows a couple of my posts to TeleSCoPE<sup>29</sup> as we were transitioning to a new theme.

**Figure 12 TeleSCoPE forum posts about customization**



The image shows two forum posts from Sylvia Currie. The first post, dated Tuesday, 11 July 2006, 12:56 PM, is titled "Welcome Jonathan and new discussion for SCoPE look and feel". The text of the post says: "Everyone, [meet Jonathan](#) if you don't know him already. I understand from being copied on email that Jonathan has some great ideas for making SCoPE an extra pleasant place to be. I look forward to seeing a new look! Summer is a good time to muck about. We can use this area for behind-the-scenes type discussion about SCoPE look and feel. I also encourage everyone to engage SCoPE members in discussions about changes to the community in the SCoPE Suggestion Box in the [Conversations area](#)." The post is signed "Sylvia" and has a "Reply" button at the bottom right. The second post, dated Friday, 25 August 2006, 11:02 AM, is titled "SCoPE look and feel". The text says: "The SCoPE site has been upgraded to Moodle 1.6, and in the process our SCoPE theme seems to have been reverted back to the default. No need to go back in time since Jonathan is working on a new look. In the meantime, I couldn't live with the jumbo font, logo, and blandish look so I changed it to a theme called "cameleon". It has a lot of green! 😊 But the blocks are defined a little better and it just looks all around tidier to me. Plus the icon set has a little more pizazz. Jason and Jonathan, if you can't live with cameleon feel free to change it back! To start again with our own theme we need to take an existing theme and copy it before editing." The post is signed "Sylvia".

Through ongoing consultation, mostly using TeleSCoPE and email, but also through face-to-face meetings, Jonathan has provided SCoPE with a look

<sup>29</sup> TeleSCoPE is a private space for discussing installations, upgrades, customization and anything not suitable for a public audience, mainly because of security issues.

that continues to receive a lot of praise. The conflict with this approach, of course, is that the community was not as involved in the process. However, the earlier feedback did help to inform the new look of SCoPE and everyone appears to be pleased with the outcome.

**Figure 13 Logo collection finalized March 2007**



### **Language pack**

A Moodle language pack is essentially all the language used to describe actions and resources within the environment (i.e. labels, error messages, help files, menus, etc.) Much of the terminology and phrasing in Moodle refers to courses, students, instructors, and other words consistent with a course management system.

### **Recommendations:**

- Continue to edit the existing language pack to reflect community activities and members
- Contribute a completed “community” language pack back to the Moodle.org community (Note: Ideally international community members will offer to translate a community pack to other languages.)

### **Update and commentary**

The flexible language pack in SCoPE has proven to be a very powerful feature. My administrator account provides access to the tables to edit the language pack, eliminating any need for special requests for access to the server.<sup>30</sup> The obvious changes to the Moodle language pack included replacing any terminology that reflects formal learning activities. For example, courses, students, and teachers have been changed to groups, members, and moderators respectively. Figure 14 shows some before and after changes to the language pack to incorporate some of these changes.

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<sup>30</sup> I should add here that I am very grateful to the LIDC technical support staff for trusting me with the access I need to complete changes to the SCoPE site. It allows me to immediately incorporate changes as the needs and idea emerge through participation.

**Figure 14 A sample of changes to SCoPE's language pack**

|                       |                                                                                                            |                                                                                                                                                                                                                          |
|-----------------------|------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| courseapprovedsubject | Your course has been approved!                                                                             | Your SCoPE group has been approved!<br>Your course has been approved!                                                                                                                                                    |
| courseavailable       | This course is available to students                                                                       | This SCoPE group is available to members<br>This course is available to students                                                                                                                                         |
| courseavailablenot    | This course is not available to students                                                                   | This SCoPE group is not available to members<br>This course is not available to students                                                                                                                                 |
| coursebackup          | Course backup                                                                                              | Course backup                                                                                                                                                                                                            |
| coursecategories      | Course categories                                                                                          | Course categories                                                                                                                                                                                                        |
| coursecategory        | Course category                                                                                            | Course category                                                                                                                                                                                                          |
| coursecreators        | Course creators                                                                                            | Course creators                                                                                                                                                                                                          |
| coursefiles           | Course files                                                                                               | Course files                                                                                                                                                                                                             |
| courseformats         | Course formats                                                                                             | Course formats                                                                                                                                                                                                           |
| coursegrades          | Course grades                                                                                              | Course grades                                                                                                                                                                                                            |
| coursehidden          | This course is currently unavailable to students                                                           | This SCoPE group is currently unavailable to members<br>This course is currently unavailable to students                                                                                                                 |
| courseimportnotought  | You don't seem to be an editing teacher in any other courses, there are no courses for you to import from. | You don't seem to be an editing moderator in any other groups; there are no groups for you to import from.<br>You don't seem to be an editing teacher in any other courses, there are no courses for you to import from. |
| courseinfo            | Course info                                                                                                | SCoPE Group info<br>Course info                                                                                                                                                                                          |
| coursemessage         | Message course users                                                                                       | Message group participants<br>Message course users                                                                                                                                                                       |
| coursenotaccessible   | This course does not allow public access                                                                   | This SCoPE group does not allow public access. Check with the group moderator.<br>This course does not allow public access                                                                                               |
| courseoverview        | Course overview                                                                                            | SCoPE group overview<br>Course overview                                                                                                                                                                                  |

An additional advantage of a flexible language pack is to be able to incorporate changes based on questions and feedback from members. “The Frequently Asked Questions list can be a great way to help users do what they’re trying to do. But be warned: If you keep getting the same questions, you may want to look for ways to insert help text where users need it, before they go looking for the FAQ” (Powazek, 2001, p.93). Rather than create an elaborate FAQ, that information can be embedded right in the help files and feedback messages users receive as a result of their actions. For example, figure 15 shows the how the confirmation message generated after created a user account contains specific information about the site and who to contact if users encounter difficulty. This figure also shows how I expanded the descriptions of the various

email options, which in the original version had caused confusions for some members.

**Figure 15 Changes to SCoPE language pack**

|                          |                                                                                                                                                                                                                                                                                         |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
|--------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| emailconfirmationsubject | \$a: account confirmation                                                                                                                                                                                                                                                               | \$a: account confirmation                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| emailconfirmsent         | <p>&lt;p&gt;An email should have been sent to your address at &lt;b&gt;\$a&lt;/b&gt;&lt;/p&gt;</p> <p>&lt;p&gt;It contains easy instructions to complete your registration.&lt;/p&gt;</p> <p>&lt;p&gt;If you continue to have difficulty, contact the site administrator.&lt;/p&gt;</p> | <p>&lt;p&gt;An email should have been sent to your address at &lt;b&gt;\$a&lt;/b&gt;&lt;/p&gt;</p> <p>&lt;p&gt;It contains easy instructions to complete your SCoPE registration.&lt;/p&gt;</p> <p>&lt;p&gt;If you have difficulty, contact the SCoPE Coordinator, Sylvia Currie scurrie@sfu.ca.&lt;/p&gt;</p> <p>&lt;p&gt;An email should have been sent to your address at &lt;b&gt;\$a&lt;/b&gt;&lt;/p&gt;</p> <p>&lt;p&gt;It contains easy instructions to complete your registration.&lt;/p&gt;</p> <p>&lt;p&gt;If you continue to have difficulty, contact the site administrator.&lt;/p&gt;</p> |
| emaildigest              | Email digest type                                                                                                                                                                                                                                                                       | Email digest type                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| emaildigestcomplete      | Complete (daily email with full posts)                                                                                                                                                                                                                                                  | Complete (daily email with full posts)                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| emaildigeststf           | No digest (single email per forum post)                                                                                                                                                                                                                                                 | No digest (single email per forum post)                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
| emaildigestsubjects      | Subjects (daily email with subjects only)                                                                                                                                                                                                                                               | <p>No digest (single email per forum post)</p> <p>Subjects (daily email with subjects only) Tip: This is a good setting during vacations!</p> <p>Subjects (daily email with subjects only)</p>                                                                                                                                                                                                                                                                                                                                                                                                         |
| emaildisable             | This email address is disabled                                                                                                                                                                                                                                                          | <p>This email address is disabled. You will not receive email from the SCoPE site.</p> <p>This email address is disabled</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| emaildisableclick        | Click here to disable all email from being sent to this address                                                                                                                                                                                                                         | <p>Click here to disable all email from being sent to this address. This will override your forum subscriptions.</p> <p>Click here to disable all email from being sent to this address</p>                                                                                                                                                                                                                                                                                                                                                                                                            |
| emaildisplay             | Email display                                                                                                                                                                                                                                                                           | Email display                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
| emaildisplaycourse       | Allow only other course members to see my email address                                                                                                                                                                                                                                 | Allow only other SCoPE group members to see my email address                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |

The second recommendation regarding language packs – to contribute a completed “community” language pack back to the Moodle.org community – has not been addressed. Enhancing Moodle’s potential to support online communities through a revised language pack would be an excellent contribution to the Moodle community and to others interested in starting their own communities. However, as it is now, we have perhaps gone too far down the language pack revision path to follow through on this recommendation. So many

of the revisions we have made pertain to SCoPE and the particular needs of our members.

## **Integration of Tools to Enhance SCoPE**

SCoPE offers an ideal venue for showcasing new tools and for beta testing. Experimentation with tools to enhance learning communities will provide valuable feedback to developers, help to showcase their work, and will also attract new members to SCoPE. There are many tools developed at SFU, and internationally, from which SCoPE members would benefit. For example, SCoPE members have used Marginalia Web Annotation (*Marginalia Web Annotation*), designed/supported by Geof Glass, Cindy Xin, and Andrew Feenberg. Marginalia provides a means for members to collect and revisit notes while participating in SCoPE discussions. It is also a valuable research tool, and particularly useful for moderators. We have also explored ELGG Learning Landscape open source software (*Elgg*, n.d.), regarding the integration of these social software tools into the SCoPE Moodle platform.

### **Recommendations:**

- Continue to involve members in testing Marginalia and providing feedback
- Invite participation from education software developers to showcase and discuss their products through SCoPE
- Continue to explore opportunities for addressing members' needs and enhancing SCoPE through integration of 3rd party software.

## **Update and commentary**

Marginalia has been in use since November, 2005. To date we have not embarked on a formal process for gathering feedback from users. Marginalia has been “discovered” by some members, but mostly there is active use after the tool is pointed out in a post to a seminar discussion. Questions about the interface and some annotations posted while experimenting indicate that the user interface needs to be more intuitive. To date, moderators seem to have benefited most from the tool, adding annotations about noteworthy contributions to discussions, and items that may require follow-up. Marginalia is also useful for adding extra information about a forum post in a non-intrusive way. For example, an individual may add a minor correction to a post that is no longer editable, or simply a comment or question that lets others know what comes to mind while reading (Xin & Glass, 2005).

In my role as community coordinator, I have used Marginalia to track comments and questions that:

- serve as alerts to usability issues
- suggest inventive uses of tools and strategies
- remind me of items requiring follow up, and
- offer ideas for enhancing the community.

Table 3 in chapter 5 shows some examples of my annotations made for this purpose.

The second recommendation in this section, invite participation from education software developers to showcase and discuss their products through SCoPE, continues to be addressed. For example, during the Serious Games and

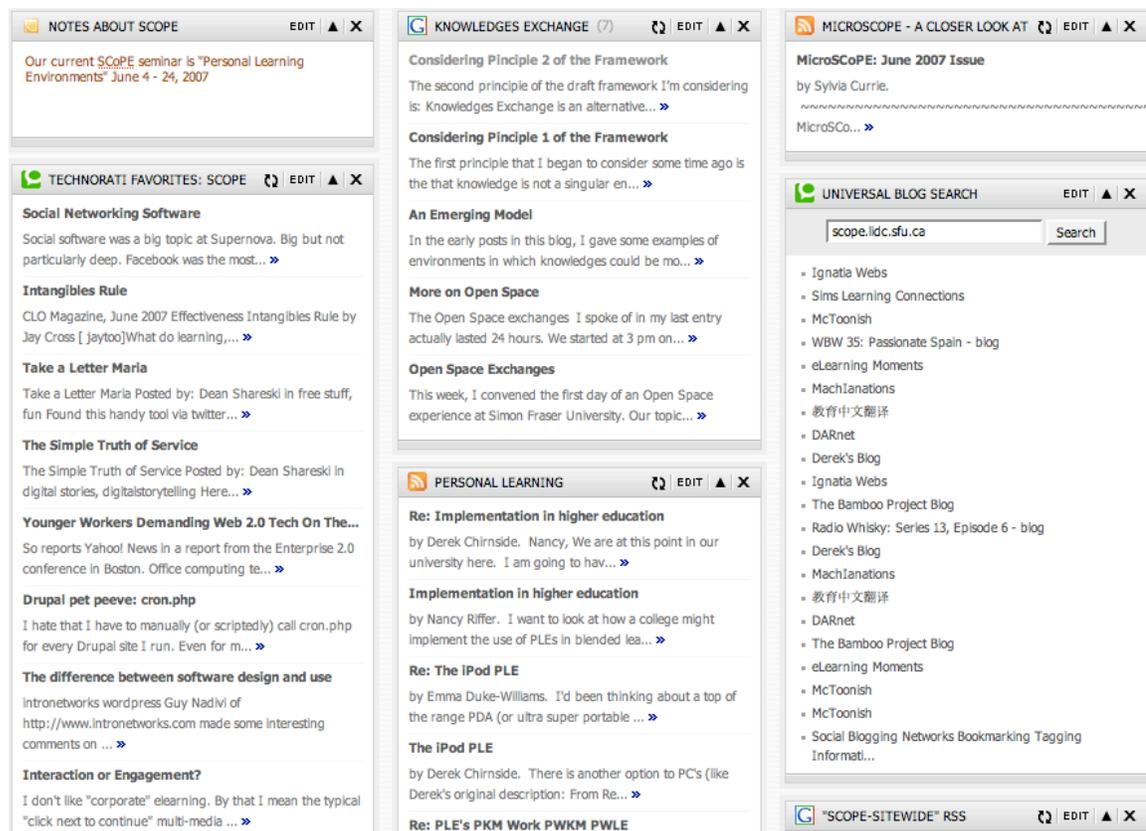
Virtual Worlds seminar participants were offered a 30-day free license to explore *Industry Player* (*Industry Player*, n.d.), a business simulation game. Also, during that seminar participants were invited for a tour of CTCUni , Cornell University's Active Worlds Universe (*Cornell Theory Center*, n.d.). Some of the opportunities for SCoPE members to engage in testing and feedback have come about informally. Other planning is more formal, such as seminars devoted to specific educational tools under development as a means to solicit user feedback.

The final recommendation in the section on the integration of tools to enhance SCoPE, to continue to explore opportunities for addressing members' needs and enhancing SCoPE through integration of 3rd party software, is proving to be an interesting area with the recent proliferation of Web 2.0 tools. These technologies provide *individuals* with increased flexibility in how they choose to interact and view content (White, 2006) but there can also be *community* preferences. For example, figure 17 later in this chapter shows an aggregation of SCoPE members' blogs displayed in the community.

A new request from facilitators is to integrate personal blogging activity with a discussion. For example, Elizabeth Wallace is developing ideas around what she refers to a new paradigm in education: Knowledges Exchange (Wallace, n.d.). In her blog she is theory building and in the discussion forum people are invited to explore ideas further. A similar format is being used for Vivian Neal who is maintaining a travel log while visiting Teaching and Learning Centres at various universities in the UK, and facilitating a seminar on the topic. These offer new opportunities for exploration and experimentation to find the best

approaches to suit these emergent needs. One tool that has offered interesting potential is Pageflake.com which provides an easy interface for viewing current SCoPE-related activities and announcements. For example figure 16 shows an aggregation of the MicroSCoPE newsletter, SCoPE Bloggers, Blogs that mention SCoPE, a notice board and a site-wide RSS feed.

**Figure 16 SCoPE Pageflake**



## Resource Management

There are many types of resources that are made available to supplement community events and activities, as well as those contributed by participants while engaging in these activities. All online communities face issues with resource management. Maintaining a community library can be very labour

intensive and the library is usually incomplete. A major enhancement to SCoPE would be to develop a plan and system for creating and organizing these resources so they can be easily retrieved and the context in which they are generated maintained. Existing solutions should be explored; for example the integration of Dataface<sup>31</sup> may provide resource management solutions for SCoPE.

### **Recommendations:**

- Develop a taxonomy of resource types
- Research existing tools to support resource management

### **Update and commentary**

Resource management continues to be an issue and little progress has been made with respect to these recommendations. A benefit of Moodle over other course management and community platforms is that each resource (forum post, attachment, uploaded file, etc.) has a distinct and manageable URL. It is clear from our experiences with the community library that a repository model is not desirable. Members should be able to assist with the community preferences for organizing resources, as well as manage their individual preferences (White, 2006).

### **Community Communication**

The SCoPE Moodle platform offers several options for members to keep up-to-date on community activities:

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<sup>31</sup> Dataface was developed by Steve Hannah at Simon Fraser University (<http://fas.sfu.ca/dataface>)

- Forum subscriptions in message or digest format,
- RSS feeds from forums, a site calendar, and
- Seamless access to public discussions and resources.

However, there are some areas where communication could be enhanced.

### **RSS feeds: calendar and forums**

The SCoPE site calendar contains SCoPE events as well as other online events of interest to members. In addition, group calendars include events of interest to that particular group, both face-to-face and online. Currently only the site administrator can create site events, and only group moderators can create group events. We also have RSS feeds from other calendars coming into SCoPE. For example LIDC events are fed into the SFU Special Interest Group area. However, these events are not in any way integrated with the SCoPE calendar.

Currently individual RSS feeds are available from each discussion forum in SCoPE. This is convenient for members who wish to be selective in the topics they subscribe to. However, there is currently no single RSS feed for all forums.

### **Recommendations:**

- Investigate options for RSS calendars in SCoPE calendar so that all members can contribute events, and we can include information from other calendars using similar technologies.
- Implement a single RSS feed option for all SCoPE forums
- Investigate possibility of including a calendar options in this feed.

## **Update and commentary**

I have monitored Moodle.org for progress on calendar component development and plans for a single Moodle site RSS feed. Some development work has focused on import/export features which do not address our needs. However, this is convenient for managing calendar events on a personal calendar. Also, the sharing feature of Google calendar has been highlighted as a possible solution. However, with Moodle's recent enhancements that allows greater flexibility in managing how users interact it's now possible to adjust what each "role" can do in a particular activity. For example, all members ("students" in Moodle language) could be given access to edit the site-wide calendar. This feature, combined with an RSS option could address our needs better than shared calendars because members might be more mindful that the entries into the community calendar would be of interest to SCoPE members. Furthermore, we could continue to take advantage of the calendar integration with other Moodle tools.

Obviously for use as a course management system, and even as a community site with some password protected areas, developing a single feed feature is more complex than aggregating all existing RSS feeds across the site. In the interim, I have manually subscribed to all public forums and aggregated them using Google Reader. This is an example of personal preferences that can be shared to benefit the community, as mentioned above in the discussion on Web 2.0 software. Subscribing to the forum RSS feeds was already part of my

routine. By organizing them into public and private categories and making a new RSS feed public, other community members benefit.

### **Monthly newsletter**

A newsletter of SCoPE highlights and activities is posted as a forum message each month. Regular updates serve as reminders to SCoPE members about what is happening in the community. Members can choose to subscribe to the newsletter by email. Formatting can become an issue when there is more than one method of reading the newsletter, so a very simple layout is currently being used. Also, there are occasions when an item is excluded from the newsletter because it precedes the publication date. A more efficient method of keeping SCoPE members up-to-date would be a weblog (or series of regular updates) from which a monthly newsletter can be compiled and generated. Members could then receive the updates/newsletter via RSS, email, or read them on the SCoPE site.

### **Recommendation:**

- Explore options for generating a monthly newsletter

### **Update and commentary**

The original newsletter format remains, and adequately serves the purpose until a better solution is found. One barrier to creating a blog for the purpose of generating a newsletter is the indecision over whether it should be a separate community blog or should SCoPE be a separate category on a personal blog.

## **Member blogs**

A Member Blogs collection was launched at the initiative of one SCoPE member. They are available through the Moodle Glossary tool. While anyone can subscribe to these blogs in their own readers, it would be useful to aggregate blogs of all SCoPE members as a way to learn more about ongoing activities, opinions, and achievements of our membership. Blogs could potentially become the primary means for ongoing conversations among members. The most recent version of Moodle includes a blog module which would be useful for members who are looking for a quick way to begin blogging.

### **Recommendation:**

- Explore possibilities/develop a method for aggregating blogs of SCoPE members

### **Update and commentary**

Figure 17 shows an aggregation of SCoPE members' blogs displaying in the community. This increases awareness of what SCoPE members are thinking and talking about, and blogging activity may in fact replace our original idea to organize a special forum for open-ended, ongoing conversations.

Figure 17 SCoPE members' blogs



## Summary

This chapter provides an overview of progress on our technology development needs after 21 months in operation. Obviously since preparing the initial Technology Development Plan several more recommendations are emerging, and in some cases new ideas come about as new technologies

become available and new possibilities are envisioned. This is an ongoing exercise that requires thinking about how communities and technologies shape each other (Wenger et al., 2005).

## CHAPTER 8: REFLECTIONS

Reflecting on the design of SCoPE has been a very valuable process. In my role as coordinator, one day simply slips into the next as I busily go about the housekeeping and moderating tasks that have become very internalized – much like riding a bike. Patricia Collins (2003) examined the “composite” roles of public online discussion group moderators, noting that over the years the role has expanded to include many more tasks such as editing, marketing, administrator, filtering, and even firefighting. She also notes the challenge of coming to understand what moderators do:

What cannot be intuitively grasped is the ongoing construction of a conversational reality from what is transpiring on the screen—the conversations and discussions they are engaged in, the technical and administrative matters they are attending to, and the general sense of connection and friendship they feel with the invisible others who make up their personal communication networks (p.25).

For a number of reasons, these daily tasks I perform and the skills and intuitions about fostering community growth need to be made explicit. My colleagues at Simon Fraser University remind me that so much of the “why” of what I do is mysterious, and just as perplexing is the “how do I know” part. Articulating what motivates me is easy, but I fumble when asked about the qualities of a community coordinator that contribute to a productive and welcoming community environment. In the future I need to make an effort to make my actions more visible, and also to question these actions and become

clearer in my own mind how I go about my work. Otherwise, how can the work we have done with SCoPE assist future community coordinators? And indeed, how can my leadership role be transitioned and distributed to other community members as SCoPE continues to evolve and expand?

So what are these qualities? Obviously this is an area that requires deep, ongoing reflection as well as a change in practice in how I externalize this thinking. Some immediate hunches about my contribution to advancing the SCoPE community fall into these 5 categories: style, effort, presence, domain knowledge, and technical knowledge.

1. Style refers to my openness and the way I present myself to others.

This is reflected in the tone of my communication, and also my genuine inquisitiveness and enthusiasm. The communication style I strive for will hopefully serve as a model for others — informal, unpretentious, inclusive, clear, and respectful. I have become aware of my own style by noticing how people respond to me, and by monitoring how careful wording can have a positive impact in online discussions.<sup>32</sup>

2. Effort encompasses more than the time committed to the role of community coordinator. It can be revealed in other ways, such as the thoroughness of a forum post. This post might include links to earlier contributions, evidence that I have researched and

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<sup>32</sup> I wish to personally acknowledge Sarah Haavind for modelling effective communication in Global Educators' Network and SCoPE discussions, and for providing me with invaluable feedback over the years.

understood the questions or issues, and attention to clear language and composition. My willingness to provide whatever support is needed for members to assume new roles, such as seminar discussion facilitator, or special interest group moderator, is appreciated and acknowledged. Personal notes to welcome individuals to a seminar discussion, or taking extra steps to learn more about the membership also fall under this “effort” category.

3. Presence is apparent in several ways and gives the impression of a well-tended community. If I am not actively participating in a seminar discussion, I may still be visible through the community’s online members list, private email, Skype, Google chat, Facebook, and so on. My responsiveness to members’ questions and needs of the community demonstrate that I am present and available.
4. Domain knowledge is important for organizing community activities and for helping to advance discussions. The educational theory background and practical knowledge and experience that I bring to my community coordinator role is helpful for anticipating interest level in discussion topics, as well as for supporting volunteer facilitators and making connections to related resources, discussions, projects. While being able to relate to the questions and issues raised in a discussion makes it a richer experience, it is not necessary for a community coordinator to be a leading expert.

5. Technical knowledge is essential for responding to members' questions and for understanding how to improve their experiences in the community. This is perhaps a skill set that I take for granted the most because it has been so embedded in my work for many years.

How will I make my work more visible? Many people have asked me why I don't blog about my community coordinator experiences, and although I've never had a clear reason, it does seem like it would be a difficult routine to establish. However, after writing this report I am appreciating the value of journaling, and even more so of blogging, which can become a public journal. I suppose I do have a journaling practice, but it is embedded in so many different places – email correspondence, forum posts in SCoPE and elsewhere, workshop communication, hand-written field notes, reports, personal and SCoPE calendar, scribbles in margins, and so on. Thankfully I have kept these sources but after going through the process of searching and organizing these scattered “entries”, I realize I cannot continue to work this way! The blogging begins!

The experience of writing a document that is intended for print has also caused me to think about the potential for organizing this report in a wiki. It could continue to expand and would provide a useful community history. I felt constrained by this linear format of writing, and realize how accustomed I have become to the convenience of hyperlinking.

An obvious challenge for online communities is selecting appropriate technologies. This report outlined the decision process for selecting a “platform”,

a place to house the community with the understanding that we would possibly integrate other technologies and even branch out into other venues. At this stage of development, with the increased interest in social software and other so-called web 2.0 technologies, it feels as though we're on the verge of an intense period of experimentation. For example, SCoPE members are gathering in a Facebook group and are enjoying the pure social aspect of these connections, and also beginning to initiate discussions related to education. Blogs are increasingly becoming useful to not only promote SCoPE but also to reflect and expand on discussions taking place in SCoPE forums. Recent projects such as the Blogging to Enhance Learning Experiences taking place in WikiSpaces is another example of an extension of community activities using web 2.0 technologies. Recently there has also been an intense interest in exploring virtual worlds, such as Second Life.

Along with this increase in exploration of technologies there may be a shift in my role as "technology steward" resulting in more distributed responsibility for organizing SCoPE activities. White (2006) explores the possibilities of emergent technologies such as blogs and related tools to "engender and support community" (p.1). A shift in how we currently monitor and support community activities will occur as we discover new options for self and group-managed sharing and collaboration.

Designing an online community requires an enormous amount of collaboration and dialogue. It cannot be done in isolation, and ideally it is not viewed as a pre-launch activity. The variety of structured design activities I have

engaged in has provided a breadth of knowledge about online community design. The informal engagements – the day-to-day conversations and observations have provided the depth.

In the case of SCoPE, a community hosted by a large university, there were several layers of administration and roles to consider. Much of this detail, especially as it relates to sustaining the community financially, wasn't even touched on in this report. However, questions and discussions related to organizational changes and finances can impact on progress and design in many ways. For example, introducing fee-based membership or activities would have a considerable impact on design work. Also, preparing applications for funding can be very time-consuming and take away from daily attentiveness to the community.

Finally, I have a closing comment for others interested in assuming a community coordinator role: The job can require as much time as you allow! There is no limit to the amount of time and effort you can invest. There is no end to the list of ways to try to advance the community. It's the most exciting work I've ever been involved in.

## **APPENDICES**

## Appendix I: Overview of Educator Communities

| Community                                                                                                                                                                                                                                                                                                                                                                                                                                  | Environment                                            | Target                                                           | Core Activities                                                                                                                                                                              |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------|------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p>TappedIn<br/>&lt;<a href="http://tappedin.org">http://tappedin.org</a>&gt;</p> <ul style="list-style-type: none"> <li>- Began in 1997 with funding from the National Science Foundation to provide a venue for teachers to talk about their practice.</li> <li>- Topics are broad, but do include elearning and use of technology in education.</li> <li>- Membership is free to practicing teachers. Requests are screened.</li> </ul> | <p>T12 is a MOO-based environment developed by SRI</p> | <p>K-12<br/>Some international membership but primarily U.S.</p> | <ul style="list-style-type: none"> <li>- Facilitated, scheduled synchronous text chat discussions</li> <li>- Member-led discussions using personal office space</li> </ul>                   |
| <p>DEOS-L<br/>The Distance Education Online Symposium<br/>&lt;<a href="http://www.ed.psu.edu/acsde/deos/DEOS-L/deosl.asp">http://www.ed.psu.edu/acsde/deos/DEOS-L/deosl.asp</a>&gt;</p> <ul style="list-style-type: none"> <li>- Membership is free and self-managed</li> </ul>                                                                                                                                                            | <p>Listserv</p>                                        | <p>Post-secondary<br/>International</p>                          | <ul style="list-style-type: none"> <li>- Ongoing open discussion</li> <li>- professional networking</li> <li>- announcements, requests for assistance</li> </ul>                             |
| <p>IFETS<br/>International Forum of Educational Technology &amp; Society<br/>&lt;<a href="http://ifets.ieee.org/">http://ifets.ieee.org/</a>&gt;</p> <ul style="list-style-type: none"> <li>- Began in 1998</li> <li>- Membership is free and self-managed</li> </ul>                                                                                                                                                                      | <p>Listserv</p>                                        | <p>Educators, all levels &amp; Developers</p>                    | <ul style="list-style-type: none"> <li>- Informal and ongoing discussions</li> <li>- Occasional formal discussions based on a scholarly paper (proposed, scheduled and moderated)</li> </ul> |

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|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------|-----------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p>ITForum<br/>Instructional Technology Forum<br/>&lt;<a href="http://it.coe.uga.edu/itforum/">http://it.coe.uga.edu/itforum/</a>&gt;</p> <ul style="list-style-type: none"> <li>- Founded in 1994</li> <li>- sponsored by the Department of Instructional Technology at The University of Georgia.</li> <li>- Membership is free and self-managed</li> </ul> | <p>Listserv</p>    | <p>Primarily post-secondary faculty and corporate trainers</p>                                            | <ul style="list-style-type: none"> <li>- Informal and ongoing discussions</li> <li>- Occasional formal discussions based on a scholarly paper (proposed, scheduled and moderated)</li> </ul>       |
| <p>WWWDev<br/>World Wide Web Courseware Developers Listserv<br/>&lt;<a href="http://www.unb.ca/wwwdev/">http://www.unb.ca/wwwdev/</a>&gt;</p> <ul style="list-style-type: none"> <li>- Began in 1995</li> <li>- Maintained by the University of New Brunswick</li> <li>- Membership is free</li> <li>- Discussions tend to be technical</li> </ul>            | <p>Listserv</p>    | <p>Post secondary</p>                                                                                     | <ul style="list-style-type: none"> <li>- Ongoing informal discussions, mostly Q &amp; A</li> <li>- Initiated, and continue to organize, NAWEB, an annual f2f conference</li> </ul>                 |
| <p>CPSquare<br/>&lt;<a href="http://cpsquare.org">http://cpsquare.org</a>&gt;</p> <ul style="list-style-type: none"> <li>- Community of practice for people interested in communities of practice.</li> <li>- Membership is fee-based.</li> </ul>                                                                                                             | <p>WebCrossing</p> | <p>Anybody interested in cultivating Communities of Practice for any purpose (corporate or education)</p> | <ul style="list-style-type: none"> <li>- Foundations of CoP Workshop</li> <li>- Theme-based project work groups</li> <li>- Synchronous sessions featuring researchers' work in progress</li> </ul> |

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|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------|------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p>Sloan consortium<br/>&lt;<a href="http://www.sloan-c.org/">http://www.sloan-c.org/</a>&gt;</p> <ul style="list-style-type: none"> <li>- Fee-based membership for access to selected activities and resources</li> <li>- Free subscription to the listserv and access to several resources, such as the Sloan-C View newsletter, and the Journal of Asynchronous Learning Networks</li> <li>- Sloan discussions tend to be non-technical, and often deal with administration and policy issues.</li> </ul> | <p>Website, and Listserv</p> | <p>Post secondary</p>                    | <ul style="list-style-type: none"> <li>- The listserv is for ongoing open discussion, professional networking, announcements, requests for assistance.</li> </ul>                                                          |
| <p>Knowplace<br/>&lt;<a href="http://knowplace.ca">http://knowplace.ca</a>&gt;</p> <ul style="list-style-type: none"> <li>- Began in 2001</li> <li>- Membership is free, although most activities are fee-based</li> <li>- Knowplace coordinators are active in open source development, and several courses are related to open source.</li> <li>- One goal of Knowplace is to engage practicum students and graduates of the certificate programs in coordinating and facilitating events.</li> </ul>      | <p>Moodle site</p>           | <p>Educators &amp; career counselors</p> | <ul style="list-style-type: none"> <li>- Online courses and certificate programs related to teaching and designing online</li> <li>- The first annual "Knowtips" online conference will be held February, 2005.</li> </ul> |

|                                                                                                                                                                                                                                                                                                                                                                                                      |                                                       |                                             |                                                                                                                                                                                                    |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------|---------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p>Cognisource<br/>&lt;<a href="http://cognisource.ca">http://cognisource.ca</a>&gt;</p> <ul style="list-style-type: none"> <li>- An knowledge community developed as part of the Interactive Knowledge dissemination (IKD) Project of the eduSource Canada Program.</li> <li>- Hasn't been active since 2003.</li> <li>- Edusource is a Canadian network of learning object repositories</li> </ul> | <p>Plone site with integrated communication tools</p> | <p>Developers, post secondary educators</p> | <ul style="list-style-type: none"> <li>- Ongoing discussions</li> </ul>                                                                                                                            |
| <p>Learnscope: Australian Flexible Learning Community<br/>&lt;<a href="http://www.learnscope.nta.gov.au/">http://www.learnscope.nta.gov.au/</a>&gt;</p> <ul style="list-style-type: none"> <li>- Free membership</li> </ul>                                                                                                                                                                          | <p>Appears to be developed in-house</p>               |                                             | <ul style="list-style-type: none"> <li>- Combination of scheduled, moderated asynchronous discussions and ongoing discussions</li> </ul>                                                           |
| <p>LearningTimes<br/><a href="http://learningtimes.org">http://learningtimes.org</a></p> <ul style="list-style-type: none"> <li>- LearningTimes is a community within Learningtimes.net, a company which provides community tools and services.</li> <li>- Membership is free and self-managed</li> </ul>                                                                                            | <p>Ramius Community Zero</p>                          |                                             | <ul style="list-style-type: none"> <li>- Webcasts with some follow-up discussions</li> <li>- "Live on location" conference support</li> </ul>                                                      |
| <p>FacultyDevelopment<br/><a href="http://facultydevelopment.ca">http://facultydevelopment.ca</a></p> <ul style="list-style-type: none"> <li>- Partnership among 3M Teaching Fellows, the Society for Teaching and Learning in Higher Education (STLHE), Educational Development Centres (EDC), and McGraw-Hill Ryerson.</li> <li>- The community forum does appear to be active</li> </ul>          |                                                       | <p>Post secondary</p>                       | <ul style="list-style-type: none"> <li>- The community is intended as a way to share, use, and discuss PD learning resources</li> <li>- Ask an expert requests</li> <li>- General forum</li> </ul> |

|                                                                                                                                                                                                                                                                                                                                                                                                         |                                                   |                                                    |                                                                                                                                                                                   |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------|----------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p>BCcampus EdTech Community<br/>&lt;<a href="http://community.bccampus.ca">http://community.bccampus.ca</a>&gt;</p> <ul style="list-style-type: none"> <li>- Membership restricted to faculty and staff in the BC education system. Others can join by request.</li> <li>- Has become the new venue for members of the “EdTech Users’ Group”, replacing a listserv</li> <li>- Began in 2004</li> </ul> | <p>Ramius Community Zero</p>                      | <p>BC post secondary</p>                           | <ul style="list-style-type: none"> <li>- Webcasts facilitated by members</li> <li>- ongoing question &amp; answer discussion</li> </ul>                                           |
| <p>Innovate<br/>&lt;<a href="http://www.innovateonline.info/">http://www.innovateonline.info/</a>&gt;</p> <ul style="list-style-type: none"> <li>- A free online peer-reviewed Journal which allows public commentary on each article, and email feedback to author(s).</li> <li>- Innovate evolved from an earlier journal “Technology Source” which had a similar format.</li> </ul>                  | <p>UliveandLearn supports the webcasts</p>        | <p>Educators &amp; administrators, all levels.</p> | <ul style="list-style-type: none"> <li>- Webcasts are organized for each author, but a separate login to Uliveandlearn is required</li> </ul>                                     |
| <p>Global Educators’ Network<br/>&lt;<a href="http://globaleducators.net">http://globaleducators.net</a>&gt;</p> <ul style="list-style-type: none"> <li>- Membership is free and self-managed</li> <li>- No longer active</li> <li>- Archives of past discussions available to the public</li> </ul>                                                                                                    | <p>Virtual-U</p>                                  | <p>Educators &amp; administrators</p>              | <ul style="list-style-type: none"> <li>- Scheduled asynchronous seminars</li> <li>- moderated by volunteers</li> </ul>                                                            |
| <p>WebCT<br/>&lt;<a href="http://www.webct.com/ask_drc/">http://www.webct.com/ask_drc/</a>&gt;</p> <ul style="list-style-type: none"> <li>- Membership is free and self-managed</li> <li>- Maintained to support users of WebCT</li> </ul>                                                                                                                                                              | <p>A Bulletin Board (surprisingly, not WebCT)</p> | <p>All WebCT users</p>                             | <ul style="list-style-type: none"> <li>- Ask Dr. C are searchable (not browsable) ongoing Q&amp;A with paid experts</li> <li>- Fee-based online workshops also offered</li> </ul> |

## Appendix II: User Requirements

Prepared by Sylvia Currie  
Last updated February 21, 2005

### 1. Program requirements

#### 1.1 Goals

---

The goal of SCOPE is to bring together individuals who share an interest in elearning research and practice, and to offer opportunities for dialogue across disciplines, geographical borders, professions, levels of expertise, and education sectors.

#### 1.2 Core Values

---

SCOPE is committed to:

- Inviting and supporting all interested individuals to participate in community activities
- Providing opportunities to use emergent technologies to support community activities
- Responding to the needs of members
- Connecting content to community discussions in order to establish rich resources

Site Personality:

- People and their activities should predominate over news and information
- Site should invite some wandering rather than just efficient searching
- No generic people images! ☺

#### 1.3 Scope

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- The community environment will evolve based on participation and feedback from the membership
- Careful not to “over-design” before launch
- The community environment is scaleable, restricted only by server size.

#### 1.4 Creative Considerations

---

- Emphasis on establishing presence and identity, co-constructing and managing knowledge objects, and optimizing tools for asynchronous communication
- Options for customizing interface
- Images should be contributed by members, or by the SFU community (i.e. students from the School of Interactive Arts)
- Adaptable
- Easy to use immediately

### 1.5 Roles

---

- eLINC: [fill in names and how each will be involved]
- Elizabeth Wallace:
- Sylvia Currie: user requirements,
- Advisory Committee: review and feedback on community environment design

Future Administration:

- Sylvia Currie: community environment maintenance & research, first contact for member support
- ELINC Technical Support Staff: ongoing technical support

## 2. User requirements

### 2.1 User types

---

Visitor:

- International
- Possible limited internet access
- Variable skill sets

Access types: Access to read calendar events, public discussions.

Member:

- Same as visitor

Access types: Access to participate in all public activities, to create/edit profiles, calendar events, documents, to view other members' profiles, and to customize environment.

Member with enhanced access:

- Same as visitor

Access types: Same as member as well as access to additional fee-based activities and tools.

Moderator/Researcher

- Same as member
- Could be new community member

Access types: Same as member but with enhanced access to moderator and research tools for selected activities

Administrator:

- Community Coordinator
- Project Coordinator
- Site administrators
- HelpDesk

Access types: Full access to view, create and edit inside the community environment.

Community Partner:

- Also a member

Access types: Same as member but with access to Partner administration tools to edit partner profile information and monitor referral logs.

## *2.2 Use case scenarios*

---

The SCOPE Community Environment will consist of the following elements:

### *2.2.1. Registration: become a member*

*User: Visitor*

Visitor 1 clicks on “register” link. She completes almost all fields in a form then submits it. The form reappears with the email address field, a required field, highlighted. She completes this fields and resubmits. A confirmation message appears with options of what to do next, such as create profile, enter current discussion/event, etc. An email message arrives in Visitor 1’s mailbox with log in information, a link to confirm registration, and a welcome note from the community coordinator.

### *2.2.2. Subscription: Subscribe to selected activities*

*User: Member*

Member 1 reads in the community update newsletter that a free seminar has been scheduled on the possibilities of social data mining for elearning. She clicks the subscribe link in the newsletter and her default browser opens a page listing

the data mining seminar activity. Member 1 types her email address and password to subscribe to that activity. A page confirming her action appears, with a list of further options, such as a link to view a list of all current and upcoming activities to which she has subscribed, or may choose to subscribe.

2.2.3 Forum: Topic-specific moderated discussion areas, mix of scheduled and open-ended format.

*User: Visitor*

Visitor 1 peruses the community environment and notices in a current forum one post from Member 1 asking for suggestions on resources for authentic assessment strategies. Visitor 1 has a full bibliography she is willing to share, so clicks the reply button. This takes her to a login page, but since she is not a community member she clicks on the new member option. This takes Visitor 1 to a form which requires basic information (name, email address...tbd). After submitting the form, a confirmation page appears, with a link to the page she last viewed (forum message). She composes a message, includes a link/quote to the original author's question "Does anyone have any suggestions on good resources for authentic assessment strategies?" and attaches her bibliography file.

*User: Member*

Member 1 logs into the community environment and sees a number 2 beside the current forum on assessment strategies indicating that there are 2 new messages. She clicks on the forum title and sees subject headings of the two messages she has not yet opened. Her current setting are to view messages by date. She switches that setting to view by association. Now the 2 new message headings appear clusters by topic. She clicks on one message subject headings to read the message. Member 1 decides to revisit the message later and clicks on the bookmark icon. A small annotation window appears and Member 1 adds a note, then saves it. She then clicks on the main cluster node in which the 2nd message appears. The full text of all messages in the cluster appears. She scrolls down see the new message. She sees that it is a message from a new member, and that a bibliography has been attached. The extension on the attachment is .txt so she knows it will open in her browser window. Member 1 is curious about the new member, so clicks on her name to view her profile. There is very little information there, so Member 1 leaves a live message to welcome the new member, and to offer assistance in uploading a profile image, or in getting oriented to the community. Member 1 then returns to the forum post by the new member by clicking on the link in her history path. She clicks the reply button and begins to compose a message. She is interrupted by a phone call, so clicks the draft button.

*User: Moderator*

Moderator 1 is preparing for an upcoming forum. He enters the forum editing environment and lists keywords as suggestions for members to use when posting to the forum.

Moderator 2 is composing a message which requires weaving contributions from several members. She selects the frames view to facilitate the process of composing while viewing forum messages.

*User: Administrator*

#### 2.2.4 Who's Here: See who is currently online

*User: Member*

Member 1 logs into the SCOPE community environment. She only has a few minutes to check into the latest seminar discussion so upon log in clicks beside her name in the "Who's here" area to make herself invisible. She is grateful that she has 60 seconds to perform this action at times when she does not wish to be visible to other community members.

*User: Administrator*

Administrator clicks on "Who's here" to see an expanded list of features for site activity

#### 2.2.5 Live Message: Send a message to member who is listed as online.

*User: Member*

Member 1 sees that Member 2 is online. M1 posts a message to M2 "I really liked your description of the ideal online instructor in yesterday's Webinar". M2 observes the cue that he has received a live message, and responds "Thanks! I'm just summarizing it now and will post it to the follow-up discussion. Hope to see you there!"

A week later Member 2 decides to follow up with Member 1 who has not contributed to the follow-up discussion. Member 2 searches his private live message directory to find the message posted by Member 1, and hits reply to send another quick note. Member 1, who is not currently online, sees upon login that a new message has arrived. Member 1 decides to set her preferences to be notified by email when a live message is sent.

*User: Administrator*

#### 2.2.6 Profile

*User: Member*

Member 1 clicks on her name to view her profile. She adds her new homepage URL to the profile and uploads a photo then clicks the save button.

*User: Moderator/Researcher*

Researcher 1 is tracking the participation of Members 1 and 2. She goes to the profile of Member 1 views all activities Member 1 has participated in, and the roles Member 1 has held in each activity. Researcher 1 then copies the URL to receive all Member 1 community posts as an RSS feed. She then repeats the process for Member 2.

### 2.2.7 Joint Authoring

*User: Member*

Member 1 participates in a working group to write a set of principles for integrating games in online courses. He opens the Wiki that Member 2 has created, adds a paragraph and uses the editor to adjust formatting, and saves the Wiki. Member 1 opens the Wiki and selects the history tab to view who made recent changes to the document.

2.2.8 Library: members access community resources which are available for viewing, downloading, and editing.

*User: Member*

Member 1 attaches a document to a forum post. This attachment is then accessed by others through the forum or Library.

Member 2 remembers the document she wishes to retrieve was shared in a forum, but cannot recall which one or by whom. She enters the word “brainstorm” but this yields a long list of results. She narrows down search by selecting “by forum” as the method the document was contributed, and “attachment” as document type. This results in a more manageable list and quickly finds the title of the document she was looking for. She notices that there are 3 versions so expands the view to see a history of document changes. She selects the most recent, and is delighted to see that the document now contains a new section on using text-based chat for brainstorming. She downloads the document, which includes a summary of authors, editing dates, and URL.

2.2.9 *Newsletter*: A monthly publication that features members and their contributions to the community, current and upcoming events, and summaries of past events.

Member 1 had set her preferences to receive the newsletter by email when she first created her SCOPE account. She now prefers to subscribe to the newsletter. In addition, Member 1 uses <http://del.icio.us> to publish her live bookmarks as RSS feeds so others can access her feeds, which helps to distribute the SCOPE newsletter to potential members.

Coordinator 1 uses a forum template to compose the newsletter. This template compiles upcoming event dates and descriptions from the calendar and summaries from past activities within a specific date range. The Coordinator adds additional information, saves the newsletter as a draft, then invites Member 2 and Administrator 2 to review and edit the newsletter. The Coordinator then posts the newsletter.

#### 2.2.10 *Announcements*: announcements of interest to community members

After participating in the “Blogging & RSS for Educators” workshop, and learning from other SCOPE members about Firefox Live Bookmarks, Member 1 decides to disable the option to receive announcements by email, and instead subscribes to the announcement forum RSS feed, and also to share her bookmarks.

#### 2.2.11 *Surveys*: method for members to vote/give their opinion

Administrator 1 creates a poll to receive feedback from members and visitors about variations on the colour schemes for the community environment. She attaches 3 images to display with the question choices. She selects the option to display results to the public, and specifies a time period for the poll to be displayed.

Visitor 1 notices the public poll on the main page. He reviews the colour scheme options and selects one choice. He then views the results of the poll to date and sees his choice is the most popular.

#### 2.2.12 *Community Profiles*: list of members registered in a specific activity

Moderator 1 is preparing for an upcoming seminar. He enters the discussion forum and clicks on the community profile link to see who has subscribed to the discussion to date.

#### 2.2.13 *Rotating Showcase*:

##### *User: Visitor*

Visitor 1 sees a feature item on the main page showcasing a contribution by a community member. She clicks on the feature link and views the feature item. She then returns to the main page and sees that a different feature item is showcased.

## **Appendix III: Case outline presented at the Vancouver Rendezvous**

Prepared by Sylvia Currie  
October, 2005

### **SCoPE <http://scope.lidc.sfu.ca>**

Project Coordinator: Liz Wallace [ewallace@sfu.ca](mailto:ewallace@sfu.ca)

Community Coordinator: Sylvia Currie [scurrie@sfu.ca](mailto:scurrie@sfu.ca)

Purpose is to simply bring together individuals who share an interest in education research and practice.

#### Background

2004 – Educational Support and Innovation Unit (ESI) at Simon Fraser University expressed interest in reinventing the Global Educators' Network, an online educator community which was discontinued when funding from TeleLearning Network of Centres of Excellence ended.

#### Early planning – Research & Design

- Sylvia participated in 8-week online CPSquare.org Foundations Workshop during the early phases of community planning. HIGHLY RECOMMENDED!
- Facilitated a consultation process using focus groups of ESI staff, and formed an advisory committee
- Study of a wide range of communities platforms, and other communities with a similar purpose

#### How are we proceeding?

- Membership is free and open to everyone.
- Scheduled, facilitated, topic-based seminar discussions. Ideas for topics emerge through participation in the community
- Identify and build on SFU interests and expertise
- Invite requests for Special Interest Groups to form public (encouraged) or private communication and workspaces
- Invite students, researchers, and curriculum and software designers and developers to use SCoPE for sharing and advancing their work
- Encourage the use of SCoPE for research on online communities
- Involve members in discussions about how to proceed

#### Decisions along the way (some surprisingly difficult)

- What do we call ourselves?
- Choice of community platform

## Tensions

- Sustain an open and free community
- Manage resources and outcomes
- Serve both the SFU community and an international audience
- Support movement between communities
- Understand our own research needs – what should we keep track of?  
What agreements do we need with our members?

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