



INCLIN Leadership & Management Program

Module 6
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E-Conferencing

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E-Conferencing

What is e-conferencing?

An electronic or e-conference is a structured discussion that takes place via a computer-mediated form of communication such as email or the World Wide Web. E-conferences differ from simple, everyday electronic exchanges among individuals in that they are carefully planned, take place within a clear time frame around a specific topic or topics and are generally moderated.

E-conferencing encompasses a two-week dialogue by a small group of invited participants on a single issue or problem to large multi-issue discussions involving several hundred invited and general participants over a number of weeks or several months.

E-conferences are being staged increasingly by many organizations. Recent examples include the Asian Forum for Health Research (see Case Study), the Food and Agriculture Organization's 12-week marathon on aspects of agricultural communication and the International AIDS Economics Network (IAEN) discussion on methods and models of cost-effectiveness analysis for HIV prevention (Kumaranayake & Watts 2000). E-conferences are far less expensive to organize and less expensive to "attend" than face-to-face conferences. They allow for wider national or international participation of key contributors to the discussion. Box 1 presents some of the positive and negative experiences with e-conferencing.

A Bit about the Technology Involved

The focus of this mini-module is on asynchronous e-conferencing in which there is a time lag of minutes, hours or even a day or two between messages or postings. E-conferences can also take place synchronously or "in real time" with a video-stream and audio-feed. Such e-conferences are more expensive and logistically and technically more difficult to organize than asynchronous ones. What's more, they place a fairly large technological burden on participants.

Email and the web can both serve as an e-conference forum. A simple group email address can be created using ordinary email software (such as Microsoft Outlook Express) for a conference involving a small number of invited participants (fewer than 20 persons). For larger conferences, automated list management software (such as Listserv, Listproc or Majordomo) are recommended.

Box 1: Positive and Negative Experiences with e-Conferencing

(Source: Saywell, D. 2002. *Electronic Conferencing and On-line Dialogue for Development Purposes*. d.i.saywell@lboro.ac.uk)

Positive

1. Immediacy (rapid information exchange takes place in a short period of time).
2. Wider access to specialists and participants internationally than may normally be achieved with face-to-face conferences.
3. Shared experience.
4. Relatively low costs compared to normal conferences.
5. Automatic archiving (where possible) makes production of post conference synthesis documents simple.
6. Tangible output available at end of dialogue (linking input to output).
7. Flexibility for participants with regard to contributing to debate.

Negative

1. Time taken to read, digest and respond to contributions.
2. Limited participation from particular target groups (i.e. World Bank) and “end users” (i.e., rural/urban poor).
3. Personalising of particular issues or contributions may reduce the value of the contribution and diminish the value of the forum.
4. Disruption to existing work schedule.

E-conferences can also be hosted on an organization’s website. Participants can post responses directly on the website or send them by email. Such e-conferences generally require more planning and preparation as time and technical expertise must go into designing web pages for the discussion (see Box 2). However, they hold several advantages over large group email conferences in that supporting documents can be made available on the website for participants to download. Messages are archived on the website making it easier for latecomers to the conference to join the discussion in mid-stream.

Tasks in Preparing for a Web Conference

1. Develop conference theme(s).
2. Prepare background summaries of the main issues or a “challenge paper” (see Case Study) with which to launch the discussion(s).
3. Draw up a mailing list of key individuals to be invited to participate in the discussion.
4. If general participation in the conference is desired, prepare conference announcement and disseminate.
5. Prepare and provide reference materials to participants, either by sending by regular mail or email or by providing access to these on a website. If previously published

materials will be made available on the conference website, copyright permissions must be sought from the publishers.

6. Prepare and disseminate a policy governing postings and ground rules for participation in the e-conference (See Appendices 1 and 2 for samples of both).
7. If the conference forum is a website, design web pages and have technical staff execute necessary programming.

Box 2: Sample Timeline for Preparing for an e-Conference

(Source: Kumaranayake, L. Watts, C. 2000. Moderating discussions on the web: Opportunities, challenges and lessons learned. Health Policy and Planning 15(1):117.)

Week	Activity
1	Develop and consult about themes for discussion.
2-3	Identify and collect reference materials for themes in an electronic form; this may mean directly contacting authors.
4-7	Negotiate with publishers regarding copyright and use of the web, and contact others regarding links to relevant websites.
8	Finalize layout for website discussion – e.g., identify how materials go together, major links between pages and links to other websites. Write introductory materials for the discussion introducing resource materials and key texts, and discussion questions.
9-10	Program webpages (for technical staff). Develop a mailing list of potential audience and participants. Individually contact key resource people who may help “seed”/develop the discussion.
11	Announcement of the beginning of discussion to general mailing list, and other relevant electronic conferences.

Note: While specific to web-conferencing, many of the activities apply or translate to activities in preparing for an email-list conference.

Role of the e-Moderator

Online conference moderators need to be sufficiently knowledgeable in the subject area under discussion, able to exert authority as a mediator, and also have the capacity to enliven the proceedings. A table of competencies required by e-moderators is presented in Appendix 3.

The role of an e-moderator is much the same as that of a moderator of face-to-face meetings. He or she conducts the electronic discussion by facilitating dialogue. The

moderator does not contribute his or her own views to the dialogue. Responsibilities of the e-moderator are:

1. Communicate the purpose and goals of the e-conference.
2. Welcome participants.
3. Set out the ground rules for the discussion.
4. Build rapport and create an atmosphere that allows various perspectives to be shared.
5. Model good communication principles.
6. Introduce discussion topics.
7. Curb irrelevant discussion.
8. Reorient discussion when it threatens to get off track.
9. Restart the discussion when a topic runs dry.
10. Encourage all participants to take part in the discussion.
11. Draw out reluctant participants.
12. Reign in dominant participants.
13. Resolve conflicts.
14. Ensure that "group think" does not prevent individuals from sharing experiences or voicing ideas that differ from those of the rest of the group.
15. Summarize the discussion at key points and highlight emerging themes and questions.
16. Solve technical problems and respond to individual participants' technical glitches.
17. Draw the dialogue to a close and ensure over the last 2 to 3 days that the participants reach some conclusions and/or make some recommendation.
18. Summarize the results of the conference and share these with participants and interested stakeholders.

The added challenges of online moderating derive from the asynchronous nature of most e-conferences, the lack of visual cues that accompany what participants say and a medium of communication in which it is easy for participants to "lurk" rather than contribute to the discussion. (See Box 3 for suggestions on how to encourage "lurkers" to participate in the discussion.)

Tips for e-Moderators

Salmon (2000:125-126) offers the following advice for moderators of online tutorial groups. Several of the points have been adapted to the context of online conferencing:

1. Post welcoming messages in the conference area before the participants arrive.
2. Provide time for participants to become familiar with the conference topic(s), preferably in advance.
3. Create structures and expectations for the conference.
4. Set clear objectives and clarify expectations for your participants.
5. Provide enough, but not too much intervention (not more than one in four messages from you).

6. Build up your conference through stages of individual welcome and social community building as quickly and effectively as possible, but never leave out these stages.
7. Be flexible, responsive and innovative to conference design and development.
8. Be inclusive of all and value all participants.
9. Be satisfied with one or two key points emerging from the discussion.
10. Find the unifying threads in a discussion, build, weave and re-present ideas constantly (present and be comfortable with conflicting opinions).
11. Accommodate lurkers or browsers, at least for a while as they may have their reasons, but email or phone them with support if they persist in non-participation.
12. Be patient and persistent, especially with novice users.
13. Let participants know if you are going to be offline for a while.
14. Model behaviours and ways of communicating online.
15. Be clear how often you are logging on and what participants can expect from you.
16. Pace the conference realistically.
17. Change inappropriate titles and headings of messages (with email explanation).
18. Move messages in the wrong discussion thread (with email explanation to the contributor).
19. Deal quietly and privately with anyone dominating the discussion – ask them to reflect before responding.
20. Conclude discussions before they peter out – if a discussion item flags, delete it (with an online explanation) and start another.

Box 3: Encouraging “Lurkers” to Participate

In small e-conferences, the e-moderator can make use of many of the same techniques used by facilitators of face-to-face discussions. The most effective of these is to use the responses of others to restate a question and directly prompt the quieter participants to comment or share their experience. Another is to acknowledge comments, if this is not done by other participants. People can feel “frozen out” or not listened to if they don’t receive feedback.

In large e-conferences where participation is open and people can join or depart at anytime, there is likely to be a great deal of lurking or “browsing.” Like walking into any conversation, it can take a while for newcomers to pick up the thread of the discussion and longer still to feel they understand the dynamics of the group, lose a sense of feeling like they are “intruding”, and put aside a fear of saying something that has already been said or otherwise exposes them as newcomers.

Often with such e-conferences, people “attend” with the intent of listening only. Because they can do so pretty much anonymously, they must be drawn into the discussion through general strategies to facilitate broad participation. The most important of these is creating an atmosphere in which participants will feel comfortable in taking part in the discussion. The moderator can do this by discouraging dominant participants by “interrupting” much as one would in a face-to-face discussion and asking others to comment. Such individuals can be politely asked to continue their discussion in private. Combatant responses should never be tolerated by the moderator.

Participants need to feel comfortable not only with the dynamics of the group but with the technology involved. With large e-conferences where people are coming and going, organizers should provide a “test area” or “arrivals area “ where people can try out their e-conferencing skills. With smaller groups, it is a good idea to engage participants in a little “warm-up” banter prior to the conference so that all have an opportunity to practice using the technology.

Remember, one advantage that asynchronous e-conferencing holds over face-to-face discussions that take place in real-time, is that it is possible for the moderator to communicate privately with individuals, “out of the ear-shot of the group”, to give them the encouragement or technical support needed to participate more fully in the discussion.

Responsibilities of e-Conference Participants

Participants in an e-conference are expected to:

1. Read the preliminary information and supporting documentation provided by the moderator(s).
2. Agree to follow netiquette (general rules for any communication on the Internet) and specific ground rules set up by the moderator(s) for the e-conference.
3. Be respectful of other participants' perspectives and experience.
4. Contribute to the discussion in a positive and substantive manner.
5. Keep the discussion on track.

Tips for Participants

The following advice is culled from *The Electronic Forum Handbook: Study Circles in Cyberspace* by Kleiber, Holt and Swenson (2002). The handbook can be found on the website of the Civic Practices Network (<http://www.cpn.org/tools/manuals/Networking/studycircles.html>) (See Recommended Readings.)

1. Speak up, but don't monopolize the conversation.
2. Address your remarks to the group not to the moderator.
3. Compose concise messages.
4. Limit each message to one idea.
5. Use descriptive subject headings that allow tracking of different discussion threads.
6. Consider whether the message should go to an individual rather than the group.
7. Remember that humour and a pleasant manner can go far in making your points.

Lessons from the Frontline

Saywell (2002) describes the following lessons for e-conference organizers:

1. Plan ways of managing and using the information obtained during the conference before it begins. Provide clear guidelines to participants which outline the specific format in which contributions during set phases should be made (this greatly reduces the time spent in editing outputs from the conference, such as synthesis documents, after the conference ends).
2. Ideally, electronic conferences should strike a balance between information exchange (such as provision of descriptive case study material) and discussion of

key themes (which requires more analytical input). There may be a tendency for information exchange to dominate since it is relatively straightforward to provide. Hence, adequate time and encouragement must be given to abstracting lessons during the conference.

3. Problems associated with unsubstantiated claims (i.e., where participants make statements without adequate referencing or justification) should, in part, be dealt with through peer review during the conference itself. They can also be reduced through guidance provided in the “protocol” document. In moderated conferences, the chairperson may screen out such messages.
4. It may take up to 48 hours for a message to be received in some parts of the world. Email connections in some countries are few and frequently interrupted. This has implications for the length of conference sessions, and may lead to messages being posted which are not relevant to that session.
5. Participants need to be convinced that there is a clear incentive for them to participate in the event. Given the growing problem associated with “information overload”, it is important to demonstrate that tangible benefits (for example, a quality output document) will be produced from the conference.
6. Production and dissemination of the synthesis report from the conference may be neglected, or difficult to achieve once the conference ends. Proper allocation of time, budget and personnel resources to its production during the planning of the conference needs to be emphasized.
7. Use of email may be expensive in some countries with poor telecommunications infrastructure. It should be remembered that some participants will not enjoy institutional support for these costs and may pay on a personal basis for incoming mail. Local nodal points may be set up to relay the conferences.



References:

Kleiber, P.B., Holt, M.E., Swenson, J.D. 2002. *The Electronic Forum Handbook: Study Circles in Cyberspace*. Available:

<http://www.cpn.org/tools/manuals/Networking/studycircles.html> [Accessed 25 June 2003]

Kumaranayake, L. Watts, C. 2000. Moderating discussions on the web: Opportunities, challenges and lessons learned. *Health Policy and Planning* 15(1):117.

Salmon, G. 2000. *E-moderating: The Key to Teaching and Learning Online*. London, UK: Kogan Page.

Saywell, D. 2002. *Electronic Conferencing and On-line Dialogue for Development Purposes*. d.i.saywell@lboro.ac.uk



Recommended Readings:

Salmon, G. 2000. *E-moderating: The Key to Teaching and Learning Online*. London, UK: Kogan Page.

This comprehensive text is a “must-read” for online distance learning professionals. Of particular interest is Salmon’s 5-step model of computer-mediated communication (CMC) in education and training. Yet, anyone looking to become a more effective moderator of online dialogue will find the book highly useful. Nearly half of the text is devoted to practical resources for e-moderators on everything from choosing software to recruiting and training moderators, to boosting participation.

Kleiber, P.B., Holt, M.E., Swenson, J.D. 2002. *The Electronic Forum Handbook: Study Circles in Cyberspace*. Available: <http://www.cpn.org/tools/manuals/Networking/studycircles.html> [Accessed: 25 June 2003]

This handbook results from the authors’ experience in making the leap from moderating traditional face-to-face forums and study circles to experimenting with an electronic version. The handbook can be found on the website of the Civic Practices Network (see URL above). Of particular note are the tips for moderators and participants and the section on “lessons learned.” Readers may also wish to check out the Appendices. These contain a note on the difference between dialogue and debate, a well-written guide to good netiquette, a list of emoticons, a moderator’s technical checklist, sample ground rules for communicating online, and some thoughts on evaluating your experience.

The Moderators Home Page. Available: <http://www.emoderators.com/moderators.shtml> [Accessed: 25 June 2003]

Maintained by Mauri Collins and Zane L. Berge of Berge Collins Associates, the website offers a set of resources for “moderators and moderators-to-be of online discussions in both academic and non-academic settings.” Visitors can link to full-text articles and other resources on the following topics: computer-mediated communication, netiquette, starting and managing email-based discussion lists, CMC and the online classroom (K-12), dissertations and theses online, sample editorial policies, computer conferencing for professional development, computer conferencing using lists, moderation/facilitation, scholarly discussion groups and teaching online.

Case Study: Asian Forum for Health Research

In February 2000, an Asian Forum for Health Research was held in Manila, the Philippines. Its goal was to promote dialogue and build consensus on:

- (1) a new equity-oriented paradigm for health research for development,
- (2) methods for building a dynamic and collaborative architecture to more effectively link the nations and region of Asia with global stakeholders in health research, and
- (3) action required for more effective health research.

An innovative approach was taken to the consultative process that led up to the event. An electronic dialogue was co-ordinated five months prior to the Forum by the College of Public Health, Chulalongkorn University in Bangkok (with support from the World Health Organisation Southeast Asia Regional Office (WHO SEARO) and the Western Pacific Regional Office (WPRO), INCLEN South-east Asia, ENHR country focal points and the Federation for Social Sciences Network).

The dialogue, in which 350 participants from more than 20 countries eventually took part, was organized around the “challenge dialogue process” developed by Professor Don Simpson of the Innovation Expedition.

The lynch pin of the challenge dialogue process is a brief challenge paper (2-4 pages in length) which is created by the moderator(s) and sent to the participants in advance of the dialogue. This challenge paper is not a detailed report. Rather, it spells out the following:

- What the challenge is
- Why it is important to engage in dialogue
- What the dialogue is expected to achieve
- How the dialogue will unfold (process and timelines)
- The ideas the dialogue will explore

The moderator then develops several questions based on the key issues identified in the challenge paper. The questions are used to initiate the dialogue.

A second defining characteristic of the challenge dialogue process is the use of mentors to assist in facilitating the dialogue. The mentors are typically recognized experts or opinion leaders. Their role is to help stimulate discussion by sharing their experience and perspective.

The challenge dialogue process was successful in identifying a number of themes and ideas that were used as entry points for discussion at the February Forum in Manila. The electronic dialogue has since evolved into the Asian Voice and serves as a vehicle to keep the region’s people abreast of developments.

Readers interested in the results of the Forum discussions can find these in a paper by Sitthi-Amorn, Pongpanich, Somrongthong, and Likitkirirat and Likitkirarat. It is entitled “The Asian Voice in building equity in health for development – from the Asian Forum for Health Research, Manila, February 2000” and is published in *Health Policy and Planning* (17(2):213-217).

Appendix 1: Sample e-Conference Posting Policy

1. All messages must relate to the conference topic(s). The conference organizers interpret this rather broadly, but messages that are clearly off-topic will not be tolerated.
2. Advertisements are not appropriate. However, a simple statement that offers a way to follow up for more information on a service or product is tolerated if it accompanies a substantive message discussing a subject appropriate to the list. Announcements of conferences, workshops and new publications appropriate to the conference topic are allowed.
3. Virus warnings (not bug reports) are strongly discouraged, and ONLY official advisories are acceptable. In addition, before forwarding any virus information you may wish to check Internet Hoaxes and Virus Hoaxes for hoax information and how to spot hoaxes.
4. Personal attacks such as name-calling and personal insults will not be tolerated. Comments that are intended only to enrage the recipient rather than contribute to thoughtful discussion are prohibited.
5. All postings must be free of copyright restrictions that limit distribution. For example, posting a significant amount of copyrighted work verbatim requires the permission of the copyright holder. To verify that such permission was obtained, all postings of this nature must include a statement that this is the case.

Appendix 2: Sample Ground Rules for e-Conference Participation

(Adapted from: Kleiber, P.B., Holt, M.E., Swenson, J.D. 2002. The Electronic Forum Handbook: Study Circles in Cyberspace. Available: <http://www.cpn.org/tools/manuals/Networking/studycircles.html> [Accessed: 25 June 2003])

1. Keep messages short and to the point. (One screen, one message).
2. Be informed. Read the background and supporting documents provided by the moderator(s).
3. Stick to the question at hand.
4. Listen with respect, respond with conviction.
5. Practice good netiquette.
6. In particular, avoid flaming. (Flaming is reacting impulsively without reflecting on how your message might come across to those who will read it.)
7. Use descriptive subject lines. This alerts readers to the topic in general and your point specifically.
8. Take one-on-one “conversations” outside the conference space. Use personal email to communicate directly with someone you would like to have a lengthier discussion with about a particular issue.
9. Feel free to send the moderator(s) private email if you have a problem or concern.

Appendix 3: E-moderator Online Competencies

(Source: Salmon, G. 2000. *E-moderating: The Key to Teaching and Learning Online* London, UK: Kogan Page. Page 40.)

Quality/ Characteristic	1. Confident	2. Constructive	3. Developmental	4. Facilitating	5. Knowledge sharing	6. Creative
Understanding of online process	Confident in providing a focus for conferences, intervening, judging participants' interest, experimenting with different approaches, being a role model.	Able to build online trust & purpose; to know who should be online and what they should be doing	Ability to develop and enable others, act as catalyst, foster discussion, summarize, restate, challenge, monitor understanding and misunderstanding, take feedback	Know when to control groups, when to let go, how to bring in non-participants, know how to pace discussion and use time online.	Able to explore ideas, develop arguments, promote valuable threads, close off unproductive threads, choose when to archive, build a learning community	Able to use a range of CMC conference approaches from structured activities, free wheeling discussions and to evaluate and judge success of conference.
Technical skills	Confident in operational understanding of software in use as a user; reasonable keyboard skills; good access	Able to appreciate the basic structures of CMC and the WWW and Internet's potential for learning	Know how to use special features of software for e-moderators, e.g., controlling, archiving	Able to use special features of software to explore learners' use, e.g., message history	Able to create links between CMC and other features of learning programmes	Able to use software facilities to create or manipulate conference and to generate an online learning environment
Online communication skills	Confident in being courteous, polite, and respectful in online (written) communication	Able to write concise, energizing, personable online messages	Able to engage with people online (not the machine or the software)	Able to interact through e-mail and conferencing and achieve interaction between others.	Able to value diversity with cultural sensitivity	Able to communicate comfortably without visual cues.
Content expertise	Confident in having knowledge and experience to share, and willing and able to add own contributions	Able to encourage sound contributions from others	Able to trigger debates by posing intriguing questions	Carry authority by awarding marks fairly to students for the CMC participation and contributions	Know about valuable resources (e.g., on the WWW) and refer participants to them	Able to enliven conferences through use of multimedia and electronic resources
Personal Characteristics	Confident in being determined and motivated as an e-moderator	Able to establish an online identity as e-moderator	Able to adapt to new teaching contexts, methods, audiences & roles	Show sensitivity to online relationships and communication	Show a positive attitude, commitment and enthusiasm for online learning	Know how to create useful, relevant online learning communities

Note: While the competencies delineated by Salmon are specific to e-moderating in the context of distance education and online teaching, many apply equally to electronic conferencing in general.