

# Working **Together Online**



**By Maureen James & Liz Rykert**

in association with Web Networks

Sue Beckwith  
Austin Free-Net

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**Written by Maureen James & Liz Rykert**  
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Maureen James and Liz Rykert

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When you work online you soon learn that you very rarely do anything by yourself. This was very true for *Working Together Online*. There are many people who helped to shape what we have affectionately come to call “The Book.” As online facilitators our first acknowledgment goes to all the participants in the many spaces we manage for their humour, patience, creativity and feedback over the years.

Next are the folks at Web Networks who have provided ideas, solutions, the technology, and the place where much of our work now happens. It was their commitment to effective use of simple group workspaces for social change that started us on this project. And their ongoing guidance and insight has made it a reality. A special thanks to Tonya Hancherow, Mark Surman, and to the friendly staff who are always there to answer questions and generate solutions.

Thirdly, we want to recognize three people who have been pioneers and mentors in this work: Rory O’Brien, a Web Networks original, Simon Mielniczuk of the Ontario Prevention Clearinghouse and Sam Lanfranco from York University. Way back in 1988, Rory told fairy tales of a magical online community where activists and organizations could come together to change the world, which are now coming true. Simon is a rare combination of techie and community development worker who has shared his vision and his humour (which is considerable) not by explaining things well but by doing them that way. Sam is the thinker behind most of the concepts we have described (in plain language) for you. Early on, Sam saw the value and influence of the social process aspects of online work and to this end has developed frameworks and research which add considerably to our collective understanding of what we mean by “going online.”

Next is the group of experienced facilitators who agreed to join a private conference to assist us in developing relevant material, sharing the kinds of concerns they hear from the people they facilitate online and off. Their input was very helpful to keeping the book focused on the people it is intended to assist.

We would also like to thank two people who read early drafts. Alison Stirling from the Ontario Prevention Clearinghouse is an experienced online facilitator whose input and insight helped us to organize the material in a user-friendly way. Cheryl Lajoie, who is now in the planning stages of bringing a large group of family resource programs online in Metro Toronto, provided the testing ground for us. At the end she remarked how helpful it was to have something she could show others when her own knowledge failed her. Her excitement about the prospect of moving her group online was infectious.

Thanks also go to Rob Ellis, whose eleventh hour artistic inspiration now flits and flutters throughout.

And finally, we apologize to our abandoned families, friends and gardens for our long hibernation getting these words out.

Thank you one and all,

Liz Rykert and Maureen James

## A Note from Web Networks

For ten years, Web Networks has been building online communities and workspaces. We've worked hard to understand what works best, how to engage groups and how to help them to achieve their goals. In studying what has worked and what hasn't, it has become clear that it takes a certain type of group to bring an online workspace to life. All the software and applications in the world won't come to much without people to make them work.

*Working Together Online* is the result of our commitment to making online tools more accessible and more useful to the groups and people that we serve. It puts on paper what we do every day in providing a helping hand to the hundreds of organizations that we have worked with. We hope that it will provide the guidance that so many people are now seeking to make their online venues more effective.

Maureen and Liz were naturals to write this book, as they have been active in bringing so many of the projects that we have been involved in to life. From health promotion to the women's movement, democracy to human rights, both have taken dull grey boxes and turned them into people tools. They are both online inspirations and we thank them for their commitment to their own communities and to Web Networks.

Internet technology is continually changing, but there's one thing that won't change: our mission to make new technologies work for people. As the medium evolves, Web Networks will be there to ensure that the tools are accessible and useful in "real life" situations. Our commitment is to helping you achieve your goals.

*Working Together Online* is another step in assisting people to use the Internet more creatively and effectively in their effort to make the world a better place.

Tonya Hancherow  
Web Networks

# **Contents**

## **Welcome to Working Together Online!..... 10**

### **CHAPTER 1**

#### **Getting Your Bearings ..... 14**

**Characteristics of Online Workspaces ..... 17**

##### **Overview of Group Collaboration Tools**

E-mail .....	20
Mailing Lists .....	21
Usenet Newsgroups .....	22
Internet Relay Chat .....	22
Conferences .....	23
Conference Joined to a Mailing List .....	24
Intranets .....	24

### **CHAPTER 2**

#### **Moving Your Group Online**

**What Are You Going to Use Your Workspace For? ..... 30**

**Who's Invited? ..... 31**

**Looking at Your Work Patterns: Offline and Online ..... 33**

**Is Your Group Ready? ..... 35**

Equipment .....	35
Location .....	36
Access Method .....	37
Enthusiasm .....	37
Experience .....	37

**Staging the Transition ..... 38**

**How Working Online May Change the Dynamics in Your Group ..... 41**

**The Workplace That Never Sleeps ..... 42**

### **CHAPTER 3**

#### **Setting Up Your Workspace ..... 48**

**What Your Group Needs to Get Started ..... 48**

Internet Access .....	48
Access to the Workspace .....	48
Setting Up A Conference .....	52
Setting Up A Conference Linked to a Mailing List .....	52
Setting Up A Mailing List .....	53

**Preparing Your Workspace ..... 59**

**Initial Messages ..... 59**

Before Going "Live" .....	62
Staging the Launch of Your Workspace .....	64

## CHAPTER 4

<b>Facilitating Your Group .....</b>	<b>72</b>
Who Makes A Good Online Facilitator? .....	72
Facilitation Roles .....	73
Types of Facilitation .....	77
A Word About Control .....	78
Creating a Learning Culture .....	78
Co-Facilitation: Many Hands Make Light Work .....	78
What Your Mother Never Told You About Facilitation .....	79
The 15-Minute Facilitator .....	80
Daily .....	80
Weekly .....	81
Periodically .....	81
Ongoing.....	82
Top 10 Questions Facilitators Ask .....	83

## CHAPTER 5

<b>Strategies for Working Together .....</b>	<b>90</b>
Dialogue and Listening .....	90
Creating a Safe Environment .....	90
Developing Ground Rules for Your Workspace .....	92
Growing Your Online Workspace .....	95
Maintaining an Active Venue.....	96
Sharing Information and Resources.....	96
Drawing People In .....	98
Developing New Threads .....	99
Summarizing and Synthesizing Postings .....	99
Reading Between The Lines .....	102
Assisting Those Who Are Not Good Online Communicators.....	102
Interpreting the Silence .....	103
Including New People .....	104
Online Mediation .....	105
Helping Your Group Collaborate.....	107
Posting Guidelines .....	108

## CHAPTER 6

<b>From Strategy to Action: Online Group Activities .....</b>	<b>116</b>
Holding Meetings Online .....	117
Case Study: APC Online Meeting .....	121
Drafting Joint Documents .....	124
New Member Orientation .....	129

<b>A Few Final Words of Encouragement.....</b>	<b>131</b>
<b>Appendix A: Managing Access to Your Conferences.....</b>	<b>137</b>
<b>Appendix B: Mailing List/Conference Request Form.....</b>	<b>140</b>
<b>Appendix C: Web Networks .....</b>	<b>148</b>
<b>Appendix D: Association for Progressive Communications.....</b>	<b>152</b>
<b>Appendix E: Glossary of Terms .....</b>	<b>162</b>



**Welcome to  
Working Together  
Online!**

## Welcome to Working Together Online!

We've put together this guide to help groups get the most out of being together in an electronic workspace. As more and more people are using the Internet for their communication tasks, it makes sense to see how we can take the tools that are available and accessible, and use them in ways that will allow us to work collaboratively. Not only does electronic collaboration save money, it allows groups to build a collective foundation of shared information in an open, cooperative and participatory way.

Groups can do just about everything they do face-to-face in an electronic workspace, and often more.

Here are just a few examples:

- A board of directors can have between-meeting discussions and develop meeting agendas
- A group of women's centres across Canada working for change in legislation concerning violence against women shares information and develops a national lobby campaign
- In advance of a major international meeting on information technology and global development, concerned individuals and experts from around the world discuss key issues and collaborate on strategies to be presented at the face-to-face conference
- Organizations in a province-wide program to improve child health post local updates, newsletters and share action plans
- A coalition of organizations concerned about fair trade organizes the logistics for a national conference
- An international peace organization, with offices around the world plans a boycott of a multinational corporation involved in the arms trade
- A fundraising working group for an environmental research organization shares leads, tactics and develops funding proposals together.

Working together online means you can:

- ✖ save money on conference calls, faxing, and travel
- ✖ easily share documents and information
- ✖ involve more people than face-to-face meetings allow
- ✖ keep an ongoing centrally accessible archive of your group's work
- ✖ involve people when it's convenient for them
- ✖ have a place to collaborate between meetings
- ✖ build and strengthen your community

Think about your group and the work you do together. Then, start thinking about the many ways you can do your work together online. This book is intended to turn those communication and collaboration ideas into reality.

## **Who this book is for...**

This book will be useful to anyone thinking about working with a group electronically. It's especially geared to the people who will be facilitating the work of the group: getting them to move online, and making the workspace productive. You may be the only one in your group that thinks that working electronically is a good idea. You can use this book to help you make your case.

We assume that you already have a basic familiarity with using e-mail and the World Wide Web. (If not, look them up in the Glossary, and you're already half-way there!)

Our background is in working with non-profit organizations and the social change community in Canada, and that is who we're speaking to here. And the examples we present are from that context. We focus on using simple, accessible tools that anyone in our community can get their hands on. Our intent is to share the strategies, successes and lessons learned of online collaboration as far as possible to facilitate the community building work of ever more organizations and movements. Of course, the skills and ideas presented here are adaptable to any country, issue area and online group collaboration context.

## **What's in here...**

You'll find everything you need to move your group from face-to-face meetings and conference calls to online collaboration. We combine the principles of electronic workspaces and online collaboration with hands-on, step-by-step how-to's. We've filled each section with relevant concepts, questions you need to consider, tried and true suggestions, and lots and lots of examples of how to apply these techniques in real-life online situations. The examples are an integral part of the learning, so we urge you to read and use them. (Of course, names have been changed where necessary to protect the innocent!)

We know that every group is unique, and each group's move to working online will be different. We have experience working with hundreds of groups and individuals going through this process, and are familiar with the many stages and situations you may face. There is no one right answer for each facilitator or each group. What we have done is identify patterns and signals to watch for. We offer tools to help guide you in your response, and some strategies that have worked for us — and warn you about a few that haven't, to help you make your own way.

## **How to use this book...**

*Working Together Online* is arranged as follows:

- Chapter 1 - Getting Your Bearings
- Chapter 2 - Moving Your Group Online
- Chpater 3 - Setting Up Your Workspace
- Chapter 4 - Facilitating Your Group
- Chapter 5 - Strategies for Working Together
- Chapter 6 - From Strategy to Action: Online Group Activities

**WELCOME**

How you use this book depends on where you're at:

- If you're brand new to the idea of working together online, we suggest you start at the beginning and work your way through. Each chapter builds on the one before it, and guides you through every step of the process for getting your group online.
- If your group is already online, you may find the practical information and suggestions for working together in Chapters 4, 5 and 6 are the best place to start.

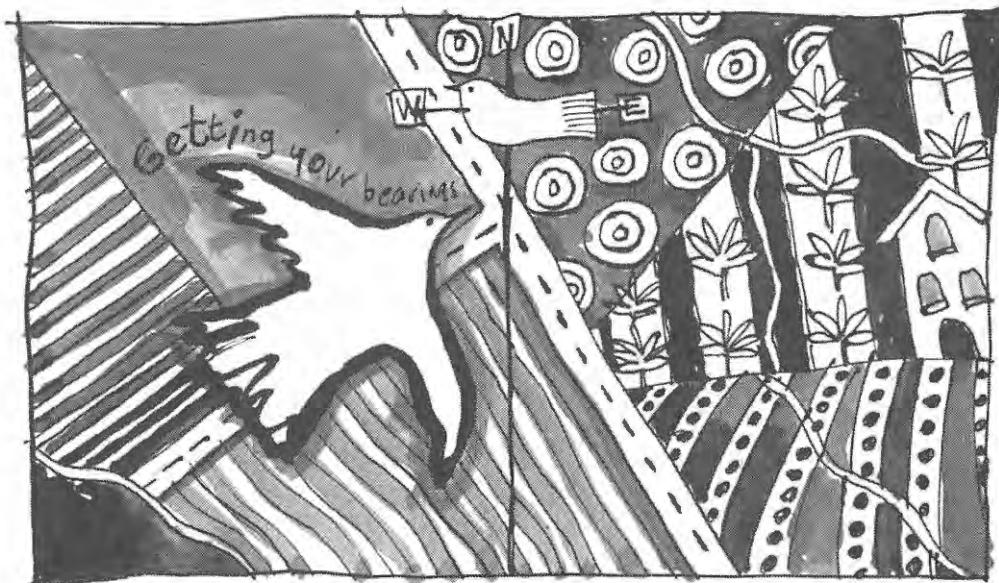
How you can best use this guide will also become more clear as you begin to plan your move. The very first place to start is with what you already know: your strategies for working with your group. You'll be pleasantly surprised at how readily these will translate to your new workspace, often with only small adjustments to accommodate the unique qualities found in online communities.



The online world of group collaboration is a place where everyone learns — not just about the content of what they are discussing, but also about how to relate to each other electronically and how to use that online work in everyday activities. Your goal is to shape the space to meet your needs.



# Getting Your Bearings



Chapter 1



# Getting Your Bearings

If you've never used an electronic workspace with a group, you've come to the right place.

In this chapter, we present:

- ❖ the concept of online facilitation
- ❖ characteristics of online workspaces: to help you get a feel for the unique qualities of your new environment
- ❖ an overview of online group collaboration tools: we look at the pros and cons of a range of networking tools

When you're done with Chapter 1, you'll have a clear frame of reference from which to plan your group's move online.



Chapter 1

**GETTING  
YOUR  
BEARINGS**

**Successful and productive online workspaces result from careful attention to the social processes of the group you're working with.**

## Getting Your Bearings

This chapter introduces the concepts we'll be using throughout this book: the tools, terms and characteristics of working together online. This is your opportunity to get your bearings and grasp the context within which the ideas of online facilitation and working together are presented.

Successful and productive online workspaces result from careful attention to the social processes of the group you're working with. Through a complex set of relationships a group comes together to pursue a common goal. How the group structures itself, gathers information, makes decisions and then communicates its actions to its membership reflect an underlying set of characteristics about the how the group works. In a large group of people you will notice a different dynamic than in a small group. The setting can influence how members of a group relate to one another as well. These group dynamics and their effects constitute social process.

## A First Word About Facilitation

The process of getting your group together and collaborating online is one that requires stewardship, commitment and patience. This may come from a single individual, or you may choose to share tasks across a team of people. The person who coordinates getting the group online may not be the same one who takes on the role of seeing that the online workspace functions optimally. You may be a group where everyone already has a sense of what needs to be done or you may be new to each other and needing to establish relationships.

We have identified a function called "facilitation" and a role called "facilitator" which are outlined in detail in Chapter 4. The thing to note at this point is that facilitation is critical to your group's success in working together online. When we refer to "the facilitator," we mean someone who provides leadership in the group to get things going and keep them going. As you read this section, think about your group, how it works together now, and how it might go about moving online. Later, you can consult Chapter 4 for ideas on filling this role with the right person or people for your group.

## What Does Online Facilitation Look Like?

It's easiest to begin with what you already know. Consider facilitation in another medium: a face-to-face meeting. Imagine that a diverse group of organizational representatives and interested individuals have come together to discuss their analysis, opinions and recommendations for action on issues of broad community impact. Some know each other, but many do not. You are the meeting chair, with a stated and at least tacitly supported responsibility for:

- creating a forum for discussion
- ensuring broad participation
- promoting constructive debate

**We take what you already know about facilitation and apply it to group process in the online world.**

- when possible, moving shared ideas into action
- when not possible, acknowledging differences without debilitating the group
- and the many other responsibilities which engage your skills with people, with group dynamics, and with mobilization.

What does your experience and skill tell you to do?

Now before you do it, add the following considerations:

- you are unable to visually read the non-participants for cues
- you will not have the dynamic of synchronous (real-time) repartee and response
- you may not know nor ever have met any of the people in the group
- people in the group will come and go during the meeting, as they wish.

This book is intended to help you take what you already know about facilitation in the face-to-face world, and apply it to group process in the online world.

How your group transforms the way you work together to include online workspaces is based partly on how you choose to design your online spaces, and on the characteristics of online venues themselves. Understanding the inherent properties of online venues and the impact they can have on your group will assist you in making the transition with your group, and lend insight to how things happen online.

## Characteristics of Online Workspaces

If this is the first time you are planning to use an electronic workspace with a group of people, it's hard to imagine what it might be like. Like any new situation, it helps to know more about what an online workspace consists of and the properties that make it unique. We offer a canoe analogy to help you get a feel for your new environment. (Don't worry, we don't expect you to use a canoe, just to think about one!)

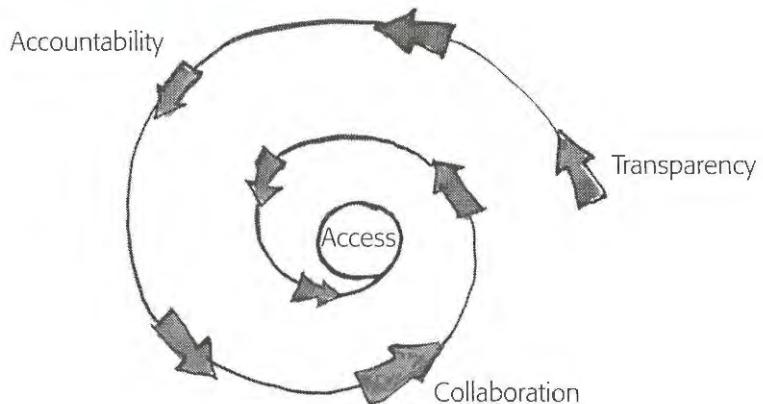
Consider a canoe by its characteristics. It is a small watertight designed for use in both deep and shallow waters. A canoe is easily transported over land, balanced to be carried by one person and depends on the skill of its paddler to take direction to avoid capsizing. What are the natural characteristics of a canoe? It is light, responsive, portable, vulnerable in bad weather and potentially tippy for some. The canoe affords certain freedoms at the hands of those who understand its inherent qualities. You would first assess a body of water, then decide how best to work with it before getting into your canoe. Like a canoe, your online workspace has inherent qualities that offer a certain momentum. Learning to place your work strategically online to take advantage of the social process forces your group requires understanding the characteristics of online workspaces and how they can affect a group of people working together.

Chapter 1  
**GETTING  
YOUR  
BEARINGS**

Your workspace can strengthen the individuals in your group and the overall group at the same time.

### Transparent

The open nature of online venues introduces a new transparency which can be wonderful in creating a place where all share the power within the group. Your online workspace instantly becomes a written record of how your group works, how decisions are made, and who is doing what. This generates paths of accountability between group members. Being able to hold each other accountable simply by working together in an open space enables groups to trust each other, build balanced relationships, and engage in more joint work. The presence or absence of contributions by participants demonstrates who is doing the work, how it is getting done, and how the group is working together. Your group's transparency can even go beyond the bounds of those working directly together to include observers such as a board of directors, funders, management, the public, and others, by giving these people access to your workspace.



This diagram emphasizes the cycle of transparency, which supports and increases group collaboration and accountability.

### Empowering and Capacity-Building

Online group workspaces are useful when the people in them start to work together. The record of dialogue and discussion, information sharing and decision-making becomes a living history of what you have done together. Because each participant can access the space, some of the traditional barriers to participation are removed. When each person takes responsibility for keeping the group informed and for participating in discussion, they are balancing their individual autonomy to act with the connectedness of being part of a group. When everyone has the same responsibility to participate and contribute online, you are able to tap into the knowledge and skills of your whole group. Your workspace can strengthen the individuals in your group and the overall group at the same time.

### Chapter 1

## GETTING YOUR BEARINGS

### Transforms the Middle

Online workspaces tend to affect the distribution of power within a group. The information-sharing function of the traditional "coordinator" role is replaced by the workspace itself. There is no longer a middle person controlling the flow or content of information within the group. This characteristic of removing the middle is referred

to as “disintermediation.” Coordinators shift to adding value in new ways. When coordinators move online their role in relationship to the group’s work can evolve: for example, they may have more time to research issues in detail and then post this to the group or they may assume a facilitation role in the online space. The addition of online venues also tends to flatten the hierarchy of relationships within the group, resulting in greater interdependence between group members.

### **Interdependent and Interconnected**

Online workspaces also tend to flatten hierarchies and increase interdependence between group members. Your workspace holds the potential to build connections not only within your group, but also beyond your group, because it is part of a larger online community.

This interconnectedness feeds our ability to strike healthy interdependent relationships between ourselves as individuals, and as groups committed to a common issue. As relationships move toward interdependence they support a healthy tension which serves to hold people together and becomes the source of creative actions. The potential for productive cooperation increases exponentially once you are equally respectful of each other’s talents and equally dependent (or interdependent) on each other’s contributions. The tendency for any one person to exercise undue power with the group is minimized.

### **Synchronous/Asynchronous**

Synchronous communication means you and the people you are communicating with must be together at the same time. Conference calls and face-to-face meetings are examples of synchronous or “real-time” communication. Traditional facilitation tools such as agendas and time-keeping are designed for the synchronous environment. Online workspaces are asynchronous environments, which means people can be online in different places and at different times. Removing the traditional restrictions of time and place respects individual differences about where to work, and allows each person to be in control of when they work. Your group needs to be aware of the variations in how each person paces their work. Some people respond daily. Others may take a day or two. Your group will develop its own unique rhythm online, which you’ll all need to learn.



### **From Technical To Social Facilitation**

When people first started using the Internet, interaction was limited mainly to private e-mail exchanges. Discussion groups tended to be either question and answer areas, or bulletin boards for news and announcements on a particular topic. Originally, the role of the facilitator was to assume technical responsibility for the orderly operating of these discussions: watching for and dealing with error messages, and making sure people could access the discussion areas, for example.

Now, more people are moving online to work together, and it has become increasingly important to focus facilitation skills on the animation of social process. Understanding how people relate to one another and work together in an electronic workspace has become the primary function of the online facilitator. Technical

**Intercon-  
nectedness  
feeds our  
ability to  
strike healthy  
interdependent  
relationships  
between  
ourselves as  
individuals,  
and as groups  
committed to  
a common  
issue.**

Chapter 1

**GETTING  
YOUR  
BEARINGS**

**We introduce  
the full range  
of group  
networking  
tools here,  
and look at  
the pros and  
cons of each.**

assistance can be acquired on an as-needed basis, and as collaboration tools continue to improve, the need for technical know-how is not nearly as important. This shift in emphasis should put you at ease as you venture forth as a facilitator in the emerging online workspaces.



Drawing on your experiences in the other spaces you work in can be very useful. Just as Alice learned to see the world differently in Through the Looking Glass, an online facilitator must learn the qualities of the electronic community, which will spark a need to modify or interpret existing tools and skills. There are still more aspects of electronic workspaces, but for our purposes we will stop here. It will take some time, and some trial and error, to harness the power of your venue to accomplish your work. You are on a path of discovering the landscape. To help guide you, throughout the book we present numerous examples that demonstrate these online characteristics in action.

@ @ @

## Overview of Group Collaboration Tools

There are many different tools a group can use to work together online. Many of the newer tools require top of the line computers and modems. We know that non-profit organizations and activists usually work with limited resources so we have chosen to focus this guide on widely accessible, tried and true collaboration tools: mailing lists and conferences. For perspective, we introduce the full range of group networking tools here, and look at the pros and cons of each.

### E-mail

Private e-mail is the simplest way to communicate on the Internet. Each person with an Internet account has a unique electronic address. By accessing the Internet with this address, you can send an e-mail message to any other Internet address in the world. You can also send messages to several recipients at the same time. Most e-mail programs allow you to set up "nicknames," which are lists of people you regularly send messages to. E-mail messages are of limited utility for group work because you have to remember to include each person's address on every message every time, which is a chore, especially as members in the group come and go. Also, it's up to each individual to keep track of and organize the discussion in their own mailboxes, which makes structured dialogue more challenging.

Chapter 1

**GETTING  
YOUR  
BEARINGS**

<b>Pros</b>	<b>Cons</b>
<ul style="list-style-type: none"> <li>• easy to learn</li> <li>• great for one-to-one collaboration</li> <li>• accessible to anyone with an Internet account</li> <li>• low-tech</li> </ul>	<ul style="list-style-type: none"> <li>• relies on the individual to maintain the e-mail list</li> <li>• not easy to handle a group that changes over time</li> <li>• limited capability for dealing with large groups</li> <li>• disorganized</li> <li>• no centralized archiving mechanisms</li> </ul>

**There are different types of mailing list software, the most commonly used being: Majordomo, Listproc and Listserv.**

### Mailing Lists

A mailing list is an automatic message-sending program that stores a list of the e-mail addresses of all the people interested in a particular discussion. Participants “subscribe” to the list. If they decide they no longer want to receive messages from the list, they can “unsubscribe.” Each discussion has its own e-mail address (e.g., act-cuts-ont-l@list.web.net). Each time a message is posted to the list address, everyone on the mailing list receives it. To make mailing lists work as a group collaboration tool, it’s best to set up a WWW archive of the discussion so the group can have a centrally accessible record of postings. (This means every posting to the list would be copied to a home page for long-term storage. You can make the home page accessible to just your group, or the general public.) There are different types of mailing list software, the most commonly used being: Majordomo, Listproc and Listserv. Which you have access to depends on your Internet service provider.

<b>Pros</b>	<b>Cons</b>
<ul style="list-style-type: none"> <li>• accessible to anyone with an Internet account</li> <li>• low-tech</li> </ul>	<ul style="list-style-type: none"> <li>• requires learning a few commands to interact with the list; people sometimes have trouble subscribing and unsubscribing</li> <li>• active mailing lists can become overwhelming very quickly causing information overload</li> <li>• it’s hard to maintain discussion focus on high-volume lists</li> <li>• the archive tools built-in to mailing list software produce “log” files that are large and hard to navigate; not all service providers offer WWW archiving and those that do usually charge to set it up, and to make it private (if necessary)</li> </ul>

Chapter 1

**GETTING  
YOUR  
BEARINGS**

**There are tens of thousands of Usenet Newsgroups on a wide variety of topics.**

### **Usenet Newsgroups**

These are public information-sharing and discussion areas that all of the millions of people on the Internet have access to. There are tens of thousands of them on a wide variety of topics. Which ones you have access to depends on which ones your Internet service provider carries, but you usually have access to thousands more than you'd ever need.

#### **Pros**

- you choose when you want to participate in or read a newsgroup (in contrast to e-mail which comes to you whether you want it at that moment or not)

#### **Cons**

- because the entire Internet population is invited, Usenet newsgroups tend towards high-volume, low-quality discussion
- not intended for focused work or long-term collaboration

**IRC is often referred to as the “CB Radio” of the Internet.**

### **Internet Relay Chat**

Also known as IRC, Internet Relay Chat is a tool for synchronous or “real-time” discussion between two or more people. IRC is often referred to as the “CB Radio” of the Internet. People adopt nicknames and choose a “channel” or discussion area they want to be part of, and leap right in. To use IRC, you need IRC software, which is easy to find for free on the Internet. Generally, IRC is used for fleeting interaction among strangers on whatever issue strikes their fancy at the moment. It takes careful planning and configuring to make IRC work well for any kind of serious private group collaboration.

#### **Pros**

- synchronous
- low-tech

#### **Cons**

- need to acquire and configure IRC software
- doesn’t offer archiving options, each person would have to keep their own log of the interaction
- requires a lot of coordination to get everyone in the same place at the same time
- prone to attack by Internet hackers and troublemakers
- not easy to make an IRC channel a safe place for your group to work

**Conferences operate just like Usenet newsgroups, but because access is limited you can get work done without the ‘noise’ of the Internet.**

## Conferences

Web Networks, and its sister networks in the global Association for Progressive Communications (APC), offer group collaboration areas called ‘conferences.’ These come in two formats: community conferences, which are open to every Web Networks subscriber; and private conferences, where access is limited to a specific group of people. (Conferences can also be shared to the other APC networks.) Conferences are accessible in both text-only and graphical (point-and-click) interfaces. In their graphical format, conferences operate just like Usenet newsgroups, but because access is limited you can get work done without the ‘noise’ of the Internet.

Participants post messages and information in these centrally accessible exchange areas, rather than filling up everyone’s mailboxes with the individual messages. Having a running record of everything your group decides or raises as an issue can be very helpful to remind people about commitments. Conferences also provide a rich archive of information for reflection and evaluation.

### Pros

- you choose when you want to participate
- easily organized, using a clear topic and response system
- accessible with standard Internet tools, no need for special software
- easy-to-use, low-tech intranet tool: offers everything a high-tech intranet tools does, without the cost and complicated software
- no need to archive, as the conference space itself is the record of the group’s interaction
- access is limited (compared to Usenet newsgroups), so conferences are conducive to collaboration
- part of the Web Networks non-profit and social change online community

### Cons

- not as accessible as plain e-mail: each participant needs a Web Networks account, which isn’t usually a problem with a smaller group but can mean more ‘outreach’ when trying to convince a larger group (see Appendix C for more information on the benefits of membership in the Web Networks community)
- participants need to learn how to use conference commands

Chapter 1

**GETTING  
YOUR  
BEARINGS**

**What you  
get with a  
Conference  
joined to a  
Mailing List  
is two ways  
of accessing  
the same  
group  
workspace.**

### **Conference Joined to a Mailing List**

Not everyone in a group that needs to work together will necessarily have a Web Networks account. Those who are accustomed to the streamlined and productive collaboration you get with Web Networks conferences are often reluctant to use mailing lists. So, to include non-Web Networks users, you can strike a compromise and set up a conference joined to a mailing list. This means that anyone subscribed to the mailing list would receive every message posted to the conference as an e-mail message. The conference would have both a name (e.g., act.cuts.ont) and an e-mail address (e.g., act-cuts-ont-l@list.web.net). So what you really get is two ways of accessing the same group workspace.

#### **Pros**

- everyone can access the discussion in the format of their choice
- widens accessibility

#### **Cons**

- more complicated for the facilitator as you have to be aware of each venue and its unique qualities
- the organized flow of topics and responses suffers somewhat since mailing list users don't get a holistic view of the space when they are participating

### **Intranets**

**The latest  
multi-purpose  
group  
collaboration  
tools being  
marketed by  
the major  
software  
developers  
are "intranet"  
tools.**

The latest multi-purpose group collaboration tools being marketed by the major software developers are “intranet” tools. An intranet is a private WWW-based (i.e., point-and-click) work area with built-in tools to integrate workflow, project management, document storage, databases and bulletin boards, and other group communication and collaboration resources. Setting up an intranet can be a large, often expensive, undertaking. Once an intranet is set up, the facilitation issues are similar to other online group workspaces. Web Networks conferences are the low-tech, generally accessible version of an intranet, and have been in steady use for ten years.

#### **Pros**

- powerful
- everyone uses the same interface

#### **Cons**

- can be expensive
- each user needs a Windows/graphics-capable computer system
- complicated software interface
- everyone has to run the same software and have access to the same server (where the intranet is set up)
- can present a steep learning curve for the group

**With  
conferences  
and  
mailing  
lists, your  
group can  
get the  
best of  
both  
worlds.**

## **Our Tools of Choice: Conferences and Mailing Lists**

We've chosen conferences and mailing lists as the best options for group collaboration because they are:

- ❖ readily available to everyone
- ❖ able to run on any computer system, graphics-capable or not
- ❖ inexpensive
- ❖ easy to learn
- ❖ low-tech
- ❖ tried and true

With conferences and mailing lists, your group can get the best of both worlds: a workspace that is easy to manage and accessible to all.

In this guide, when we refer to "online group workspace" we mean both mailing lists and conferences unless otherwise specified. There are some technically unique differences between them, which we'll point out where necessary.

Both conferences and mailing lists are available in two formats: graphical and text-only. This means members of your group may be using graphical (point-and-click) Internet software like Netscape, Internet Explorer, Eudora or Free Agent, for example. Or they may be limited to a text-only interface using non-graphical communications software like ProComm, Zterm, QuickLink, etc. People with old equipment and those using Free-Nets are limited to non-graphical software. As facilitator, you'll need to be conversant in both graphical and text-only access because there are some facilitator functions (for conferences) that are restricted to the text-only interface. Also, being aware of the different technical interfaces your group is using will help you to support them.



Here in Chapter 1, we've provided you with all the context you need to consider your group's move to an online workspace. Chapters 2 and 3 take you step-by-step through the stages of moving online, and the setting up of your electronic workspace. Learning to work online in shared workspaces is fun and challenging. We know you'll enjoy bringing your space to life and watching it grow!



Chapter 1

**GETTING  
YOUR  
BEARINGS**

# Moving Your Group Online



Chapter 2

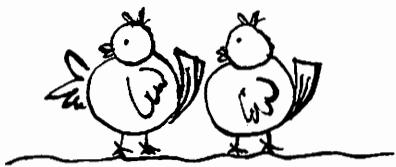


# Moving Your Group Online

Whenever a group considers moving online to work together, a number of questions come up:

- Why are we moving online?
- What will we be doing there?
- Who will be able to get access to our workspace?
- What do we need to be able to do this?
- How will we make the transition?
- Will this change the way we work together?
- Will we ever see each other again?

As facilitator, you will take a lead role in your group's transition from working together face-to-face to working together online. This chapter guides you through each of these questions in order for you and your group to be adequately prepared to make the move.



Chapter 2

**MOVING  
YOUR  
GROUP  
ONLINE**

**It's good for  
your group to  
think  
through the  
move to the  
online  
environment  
together.**

## Why Are You Moving Online?

Groups decide to work together electronically for all sorts of reasons:

- It's cheaper than conference calls, faxing, and travel
  - It's a flexible way to share documents and information
  - You can involve more people than face-to-face meetings allow
  - You keep an ongoing centrally accessible archive of your work
  - People can participate when it's convenient for them
  - Online work is transparent, participatory and encourages open discussion
  - You have a place to keep working together between meetings

Sometimes groups start to work online because they are required to by some external process: a funder requests that reports be submitted electronically, or a board of directors decides that the committees will save money by doing their between-meeting work online, for example.

Whatever the reason, it's good for your group to think through the move to the online environment together. If possible, it's helpful to arrange face-to-face sessions (as part of an Annual General Meeting or some other gathering) where the group can discuss reasons for moving online, demystify the technical process, air concerns, and brainstorm ways of approaching the transition. This section outlines the things you need to be ready for, and ways of supporting your group through the transition to the electronic workspace.

## What Are You Going to Use Your Workspace For?

Collaboration and information exchange doesn't "just happen" because an electronic workspace is set up. You need a clearly defined group to bring online and a clearly defined reason for bringing that group together online, otherwise your online space can become a lifeless depot for bulletins and unanswered questions. Online collaboration is easiest when you're bringing together a group that would naturally be collaborating in other venues, outside of the electronic one.

For example, every year the federal Minister of Justice hosts a consultation with 60 delegates from equality-seeking women's groups across Canada. The delegates are invited to convene for two days in Ottawa to hammer out their views on the government's policies to end violence against women, which are presented to the Minister on the third day. In 1995, the Minister offered to computer link several of the groups in hopes that the need for the face to face time before meeting with the Minister might be reduced. So far the groups have maintained the budget to meet in person but now that they are linked electronically, they have also increased their ability to plan, discuss and prepare throughout the year and are therefore in a better position to use the consultation time with the Minister. They are doing this pre-consultation work in a private conference linked to a mailing list, where they have more time and space to share information about local happenings and to prepare policy recommendations before arriving in Ottawa.

Chapter 2

**MOVING  
YOUR  
GROUP  
ONLINE**

## **What It Takes to Start a Conference...**

Genevieve, a veteran APC Networks conference-user has this to say about being clear why you're working together online:

"Even trained facilitators and glitzy technology will not increase conference participation in my broad experience. What it takes is:

- A committed starter group of good participants to start and forward the discussion.
- A purpose. On expensive networks where high-pay mainly computerists hang out, purpose is minimal. They are content to just watch themselves talk. But HERE, [on the APC] most users are not high-income and are here because they hope it will advance the goals they are already working toward. Therefore, a reason for conferencing is needed. I always prefer to form the conference community offline, then bring them on to do specific tasks. That's not easy either, because then you have to deal with getting them equipped and trained.
- A good facilitator is important, but not sufficient without the other two for any length of time.".

Genevieve's observations are equally relevant whether you're using a conference or mailing list. Having a focus for your online collaboration makes it easier to motivate participation, and easier to facilitate.

## **Who's Invited?**

Who will be working together in your online space? This is a critical consideration. Creating a comfortable and productive online environment with your group is your primary task as facilitator. Both mailing lists and conferences offer tools that allow you to control who has access to your workspace. (See the Setting Up Your Mailing List section in Chapter 3 and Appendix A: Managing Access to Your Conference.)

In the case of the women's justice networking space, access is strictly controlled. Only designated representatives of each organization are invited to participate in the private space. This group's work is extremely sensitive, and the participants need to be assured that their workspace is secure. Although the Department of Justice is funding participants' access to the space, the Department does not have access to it. The space has three purposes: to allow the participants to improve their local work through contact with each other across the country, to allow inexpensive ways of communicating information to these groups from the Justice Department, and to allow these groups to funnel information to the Justice Minister by passing it up through their designated contact person instead of individually.

In another example, several Community Action Program for Children (CAPC) sites across Canada share information in a more open workspace. Access is open to staff and coordinators of the sites, the funder (Health Canada), and people involved

Chapter 2

**MOVING  
YOUR  
GROUP  
ONLINE**

**You need to consider the type of group you are and the type of work you want to do together.**

in supporting the group in the use of electronic workspaces. The space is primarily used for sharing updates between sites, coordinating reporting to the funder, and some strategizing.

Each of these examples highlights some considerations you should take into account when defining who has access to your workspace.

You need to consider the type of group you are and the type of work you want to do together:

- What makes this group a group?
- Why are we working together?
- Are we moving online for general information-sharing (in which case the group could be a more open one) or to collaborate on a particular project or campaign (which may narrow the field of participants)?
- How important are security considerations to the work being done?
- How widely or narrowly should access be extended?
- What are the criteria for getting in?
- What is the decision-making process for admitting or removing participants?
- If the work of the group involves putting together a campaign on a particular issue, do the participants want those at whom the campaign is directed to see it develop?

In the case of the women's justice organizations, it was agreed from the beginning that the Department of Justice would not have access to the discussion area. In the case of the CAPC sites, many of whom risked losing 50% of their funding in 1997, a campaign to lobby Health Canada was developed with the Health Canada funder present.

If yours is a tightly-knit group working closely on a particular project, do you need a workers-only roll-up-your-sleeves space so you can feel free to say what you want? Or should it be open to others more tangentially involved in the project so they can keep tabs on it — advisors, board members, volunteers, funders, and others?

You need to work with your group to help them understand the implications of controlling access to the workspace, and to go through a process to determine the best configuration of people for your workspace — before it is launched. It may be clear who needs to be there right from the start. Also, the original group will probably evolve over time. Access privileges can be expanded, contracted or changed as the need arises.

As facilitator, you need to be sure everyone knows who has access to the space when it is launched, and to inform your group before any changes take place. Often it is the group that will initiate the request for access changes.

Chapter 2

**MOVING  
YOUR  
GROUP  
ONLINE**

needs of different groups of people. Again, this need will become obvious by how the group is using the existing group workspace. (See Growing Your Online Workspace in Chapter 5.)

Here is a sample posting that identifies who will be working in the electronic workspace, and that the participants may change over time:

```
/* Written 9:28 PM Mar 15, 1995 by sallyt in web:youth.futures  
*/
```

```
/* —— "Purpose" —— */
```

The purpose of this workspace is to provide a discussion area for those connected with the planned Youth Futures Network. Initially 11 projects in Ontario and 11 in British Columbia will be connected with funding from Human Resources Development Canada, and support from the Ontario Youth Secretariat. An external evaluator will assess the project during its evolution. I'll post here when I know who that evaluator is going to be.

Initially this conference is restricted to those working on the roll out of the initial groups. Later the conference may evolve into other purposes.

Participating members may also increase over time.

Virtually,

Sally Thomas

Ontario Youth Secretariat

**Spending  
time up front  
looking at  
how your  
group  
communicates  
offline will  
assist you in  
planning the  
transition to  
online work.**

## Looking at Your Work Patterns: Offline and Online

Spending time up front looking at how your group communicates offline will assist you in planning the transition to online work. This also helps you make the most of those times when you do work together face-to-face. You may want to seek outside support to help you go through a thorough communications assessment to explore ways that electronic communications can help to make your group's work more efficient and cost-effective. Web Networks has worked through this process with hundreds of groups across Canada.

Here are some things to consider:

- How do we usually get work done together now?
- Who currently initiates communication among the whole group?
- Are some people out of the loop? Why?
- How are decisions made within the group?
- What is the work pace of the group? Do we usually take a day to make decisions or do we require longer?
- Is every member of the group committed to working online and do they have support for this from the organizations they are working for?
- How often will each person be able to get online?

Chapter 2  
**MOVING  
YOUR  
GROUP  
ONLINE**

**Your  
group's  
initial  
discussions  
can lead to  
new ways  
of doing  
things you  
may not  
have  
thought of.**

Asking these types of questions will shed light on the way communication flows within the group and who is primarily responsible for getting it moving. It will also reveal where information tends to get stuck, which can be an indicator of power relationships within the group.

Specifically, you'll need to examine the communication methods your group uses, and to work with the group to determine how these will be accommodated or changed by moving online. For example:

- How often do we get together face-to-face, and what is the purpose of these meetings?
- How often, and what, do we communicate by phone, fax and postal mail?
- Who assembles information for the group? Is this a task the group could do rather than a single person?

Your group's communication patterns will emerge from the answers to these questions. These initial discussions are important to get the group dreaming a little about how they imagine they can use online spaces. This can lead to new ways of doing things that you may not have thought of.

Try asking some provocative questions to get the creative juices flowing:

- If you had no restrictions on sharing information, what difference would this make to your jobs?
- What is the greatest problem with communication within the group now?

Your group will need to decide how to address the power and information relationships that emerge.

The next step is to take your group through a process of translating your communication patterns and new ideas for working together to your online workspace.

- For example: if there is currently a coordinator in the group whose role is to circulate information to the whole group, rather than synthesizing, preparing and faxing that information to everyone, they could ask for reports from everyone to be posted in the online workspace. Their job could then be to pull together a final report from all the individual pieces, which they would post separately.
- Or, if you currently send out an information package to all your board members before a board meeting, you could move this work online and transform it: collectively the group would develop the meeting agenda online, and everyone with preliminary information to post would do so one week before the face-to-face meeting. Minutes would no longer need to be circulated anywhere but online, and it would be each member's responsibility to read them online before the meeting.

Chapter 2

**MOVING  
YOUR  
GROUP  
ONLINE**

Some things to think about when planning your move online are:

- What are some specific outcomes we can be working towards in our electronic workspace?
- What are some focused online activities that would be useful to our group? Regular updates from each community or program area; joint preparation of funding proposals; or developing an organization- or community-wide campaign, for example.

This is a good time to develop a set of expectations among your group about when people will access the workspace: Every morning? Every evening? Both? By working through these expectations, your group is beginning to establish new paths for how they will communicate, when and with whom. The online workspace will become the place the group will rely on for the most up-to-date information about the effort they are working on.

Examining your current communication patterns with a view to moving them online helps to identify redundant activities and the shifts in responsibilities among group members that will take place. You're also preparing the group to begin working online. Involving them in planning the transition ensures that they will feel just as competent sharing information online as they do in their current ways of communicating.

At first, many people think of using their workspace as "more work," in addition to the work they already do. What your group will find is that the workspace is one of the places where they actually do the work they used to do in meetings, on the phone, at the fax machine, etc. So, you're not really adding to your workload, but actually transforming *the way* you work together and *where* you do that work.

## Is Your Group Ready?

As facilitator, helping your group make the transition from the face-to-face world of meetings and the voice-to-voice world of conference calls to the screen-to-screen world of the electronic workspace is easier if you have a good idea of your group's readiness to move online.

You may be lucky enough to know each of your virtual colleagues personally, or there may be some you've never met. Either way, you'll be better prepared if you do a bit of fact-finding before launching your workspace. The larger the group, the more work this is. But we guarantee it will help you in the long run.

Here are some things that are helpful to find out when planning to work together electronically:

### Equipment

Having an idea of the computers, software and modems your group members are using is handy. Not everyone will be using the latest fanciest machine on the market. People using older equipment will face certain limitations. You might think it

Your group  
will find  
that the  
workspace  
is a place  
where they  
actually do  
the work  
they used  
to do in  
meetings  
and on the  
phone.

**Having an idea of the computers, software and modems your group members are using is handy.**

would be simpler to ask everyone to use the same tools to connect, but individuals are often most happy and successful using the tools they already know. Be prepared to make a special effort to accommodate the variety of hardware and software combinations that may present themselves. Of course, if there are people in your group that have never worked online before, feel free to recommend the suite of tools you find easiest to support, and that you think work best.

If you're trying to bring individuals within organizations online, find out where the computer with the internet connection is in their office. Make sure it gets placed on the desk of the person who is actually going to be participating in your workspace. Also, try to place the computer where someone can be online and using the telephone at the same time. This is not always possible because it means you need two phone lines but it makes it a lot easier to get technical support.

Take a survey of your group's equipment inventory:

- How many are using IBM-compatibles? Which operating system are they running: Windows 3.1, Windows 95 or DOS?
- How many are Macintosh users? Which system version are they running?
- How many are already using the Internet? Which tools are they using?
- Are there any that don't have a modem and/or Internet software?
- Are there any with older computers that can't run graphical Internet software?

Remember that participants will likely be using different software to connect to your workspace. This means that they will run into different types of problems. If at all possible, it's good for you to try connecting to the workspace in a variety of ways, to understand what the participants are talking about when trying to help them. For example, you should try using graphical Internet software, telnet, and non-graphical software to connect and use your workspace.

Access problems can arise at a number of different places in the connection process. As facilitator, you are the first person many people will contact. You should become familiar with the range of possible sources of support, so you can refer your group to them: support staff at Web Networks, Internet Service Provider technical support staff, and software and equipment manufacturers.

### **Location**

Where is everybody located? If your group is spread out geographically, many will be connecting through different Internet Service Providers (ISPs), so each will have a different connection process. Connection problems are usually the biggest hurdle that new users have to overcome. Knowing this in advance helps you cope when people are struggling and begin to question the decision to work together electronically. If connection is indeed the source of the problem, you can direct participants to the technical support staff at their ISP. Or, if you're an Internet handy-person, you can try trouble-shooting the problems yourself first.

**As a facilitator it's your job to be available to those who will need extra support.**

## **Access Method**

Depending on the type of workspace your group has chosen, there are different ways to access it. As the facilitator, you need to know how your electronic workspace is set up, and to be able to explain to participants the various methods they can use to connect. Here are the possibilities:

### **Conferences**

There are two different ways to get into a conference. You can use graphical newsreaders like Netscape, Internet Explorer and Free Agent. Or, you can connect to the Web Networks text-only interface using "telnet" or other non-graphical communications software like ProComm, Zterm, BitCom, etc. (Usually people with older computers use non-graphical software.) Which access method each participant chooses depends partly on personal preferences and partly on available software and hardware.

### **Mailing Lists**

If you are running a mailing list, participants may be using graphical e-mail software like Eudora or Pegasus. Or they may be on a text-only system receiving e-mail using Pine or Elm. Again, which program a person uses depends on preference as well as the hardware and software they have access to.

### **Conferences Linked to Mailing Lists**

For conferences linked to mailing lists, some people will receive each message posted to the conference as an e-mail message and others will access the conference directly. Options are the same as those provided above for Conferences and Mailing Lists.

## **Enthusiasm**

In every group of people trying to make the move to online collaboration, there are always some people who are really excited about the opportunity, some who are willing to suspend their disbelief and give it a try, and others who will energetically resist. As a facilitator it's your job to be available to those who will need extra encouragement. Some may never want to know more than the basics of getting connected to the workspace. The resisters don't want to hear about the miraculous promises of the new technologies, they just want to know exactly what they need to do to avoid being left out of the communication loop. The hard part can be getting them there. Once they're up and running and have experienced some small networking successes, they'll be ready to explore a bit farther. Be sure to provide regular encouragement to keep them there!

## **Experience**

How familiar is the group with using electronic communications? Some may be veteran network users, and others may be getting set up for the first time. Many will have used the Internet primarily for sending and receiving e-mail, and for surfing home pages, but never have tried to use it for working collaboratively. E-mail users are accustomed to having information come to them, as opposed to proactively going to get it as you must do with a conference. Also, the format and arrangement

Chapter 2

**MOVING  
YOUR  
GROUP  
ONLINE**

**Don't forget  
to take the  
time to make  
sure you get a  
wide range of  
training in  
online tools  
and  
processes.**

of information in a conference will be new to them. Those unfamiliar with conferences will be pleasantly surprised at how well they allow you to manage the information overload that comes with being on numerous mailing lists.

Each group will have unique skills, experiences and habits to bring to your workspace. The more you learn about each other in the beginning, the easier it will be to get everyone working together.

## **Staging the Transition**

Every group moves through the transition period of introducing online workspaces at a different pace. Some groups start their work together for the first time online, so

**Training** is essential to build the confidence and skills of your group for working together online.

Training sessions with your whole group or on-site with each member, prior to getting started, can be a time to build skills, and will assist you in identifying people who are at ease in the environment and those who may require more support. Organizing a full-group training session also creates informal opportunities for the group to establish norms for the online space. For example, one group with a number of members who are not highly literate and therefore fearful about posting messages with spelling mistakes, agreed that postings should always be informal and no judgment would be made about grammar or spelling. We suggest you only plan training once you have confirmed everyone in the group is set up and able to connect, so they are able to get online right away once the training is over and can begin using what they have just learned.

Web Networks can work with you to arrange group training sessions at your next face-to-face meeting. Training for national groups can be coordinated to coincide with your Annual General Meeting, for example.

In some cases, it may be necessary to do one-on-one on-site technical troubleshooting or training sessions for anyone who is really struggling. Also, a follow-up session three or six months into the effort can be very helpful to check in and answer questions, as well as to use the skills already acquired within the group to promote a culture where each member assumes a role of supporting others in learning. This approach helps to build a shared responsibility among the group and build the group's capacity to assist each other in working together online.

And finally, don't forget to take the time and resources necessary to make sure you get a wide range of training in online tools and processes. As facilitator, the more you know about the various aspects of your online workspace, the better you will be able to support your group. Web Networks offers a facilitator training program, and online discussion areas for facilitators.

**We  
recommend  
you  
establish a  
schedule  
for the  
transition  
stage.**

they are establishing communication norms which are new. In other cases, where existing means of communication are well-grooved pathways, a successful transition will require getting agreement from all participants on when and how to move to the online space. If some members fail to move online and continue to resort to old communication patterns, the group's efforts to work together online will be seriously challenged. When this happens, you'll need to revisit and reaffirm your group's commitment to working together online.

Seeking agreement among group members about when your communication patterns will begin to change and how it will happen helps them to feel prepared and ready to work online. We recommend you establish a schedule for the transition stage. This should be distributed to everyone well in advance. In addition you can begin to discuss what types of information will be posted and when that will start.

The timeline would target dates for the following:

- making sure everyone has an Internet account (and a Web Networks conference access account, if you're using conferences)
- making sure everyone can connect to the workspace
- opening the workspace and posting the purpose statement and other initial postings
- opening a sign-in topic and having each member sign in
- beginning to move the material that would normally be circulated in other ways online (with alternative sources as a back-up)
- setting the date for when the back-up sources will no longer be available.

During the transition, as facilitator you'll need to:

- assist members to meet their goals in the transition stage through a combination of mentoring and encouragement
- set limits for falling back into old communication patterns
- advance the group's efforts to shift the ways and means people get and provide information.

The amount of time it takes to move through the transition varies with each group. For one group the transition took three months, and for another it was just over one month. In each case, group members shifted from passively receiving information either in the mail or by fax to taking responsibility for their own information gathering and sharing. A transition schedule with target dates will guide your group through the stages of moving online at a pace that's appropriate for them.

Be sensitive to peoples' fears about their ability to make the transition. Build in back-up systems to ensure that information can make it online from those who are still learning or those who are held up with technical delays. If you've done your pre-launch fact-finding you should know who will need some extra support.

Chapter 2  
**MOVING  
YOUR  
GROUP  
ONLINE**

**The move to working online can have an interesting impact on the dynamics within your group.**

As members of your group first start to post messages in your workspace, check with those who aren't there yet to see if they have messages or information to contribute and find ways to get that information posted. You can start by posting urgent details for them, and keeping them up to date for an agreed upon time period. This can quickly become an onerous task. Ideally, you should arrange for them to receive training so they can post their own material themselves. Your role as intermediary should be a short-term arrangement.

Note: If there are some members of your group that can't participate online at all, consider setting up permanent bridging mechanisms. One way of doing this is to set up a buddy system where one person agrees to be the go-between for sending and delivering information for the non-connected person.

Be prepared for your group's learning curve and encourage patience while members move through it at different paces.

### **Sample Timeline for the Transition**

1. Send out a reminder notice announcing when the online workspace will become active and what it's for.
2. Check in with each participant to their equipment and connections are working.
3. Confirm which information will start to be shared online and how that information will be available in alternative ways (e.g., phone, fax, meetings). Identify who will be responsible for each aspect of your group's information sharing.
4. Start using your workspace for posting information. Remind people to contact you if they are having difficulties.
5. Eliminate the alternative methods of information distribution, but remind people how they can ask for it if they need to.
6. Check in with those who haven't begun using the workspace.
7. Confirm that it is now each person's responsibility to retrieve and share information in the electronic workspace.
8. Set a date for making the online workspace the first place for people to check for information and remind people information will no longer be distributed in other ways.



Chapter 2

**MOVING  
YOUR  
GROUP  
ONLINE**

## How Working Online May Change the Dynamics in Your Group

The move to working online can have an interesting impact on the dynamics within your group. The usual constraints of time and place that face a group trying to get work done together are removed when an online workspace is introduced. Each member can access the workspace at their own pace and when it fits into their work routine. The online space becomes a place where people are expected to participate and post regularly. Existing information sharing patterns and power dynamics among the members will become more evident when moving online, and will likely be transformed.

We always hear that information is power. With the introduction of an online workspace, everyone has equal access to the group's information regardless of where they sit in the organizational hierarchy. Working online can be unsettling for people who are in the habit of hoarding information. Hoarders will be apparent by their absence in the space. Since the group will come to rely on the workspace as the first source of up-to-date information, those who aren't using it will be out of the loop. If people don't share their information online, it can't be taken into consideration by the group, and therefore will be bypassed.

Equal access creates a sense of flattening the relationships within the group. You should watch for the absence of key players and be aware there may be reasons other than technical ones which are preventing them from joining in online. Look at the aspects of openness and transparency, or the power relationships in the group and how they change once you go online to see if this may be the cause of missing people. Be sensitive to who controls the flow of information within the group and who usually moves to seek resolution to disagreements..

If your group has traditionally relied on a coordinator to prepare and supply most of the group's written work, and not shared these responsibilities among your members, then you'll experience a marked difference in work-sharing when you move online. With the addition of an online workspace the role of the person or organization doing the coordinating from the middle shifts, and your workspace becomes the central place for people to check in. This can impact your group offline too: you might see a greater sense of shared responsibility for the group effort and less reliance on a coordinating body for pulling things together. In many cases the role of the coordinator shifts to include online facilitation. This is an opportunity to redefine the role of the middle person to enhance the capacity of the group to accomplish work together online. Many groups report an increased sense of trust develops between members after they begin to transform the way they are working. This can be a welcome benefit to the overall group effort!

The following diagrams help to demonstrate how the communication in a group shifts with the addition of an online workspace. Each person is now able to link with every other person online. The result will be a rich infusion of relevant and timely information and interaction.

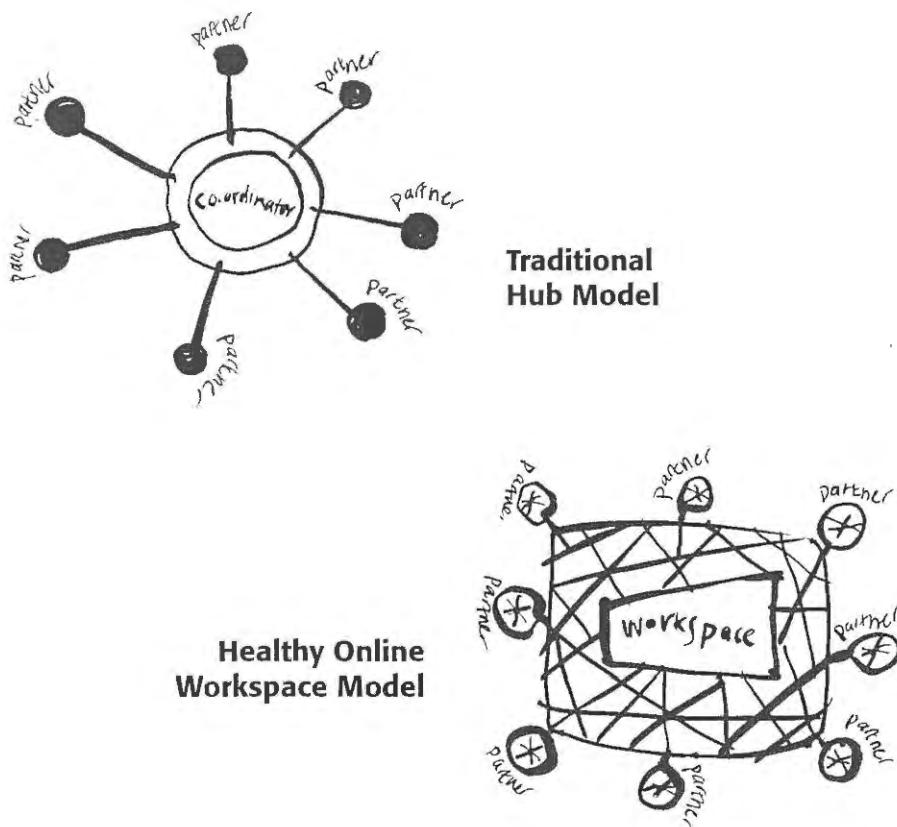
With the introduction of an online workspace, everyone has equal access to the group's information regardless of where they sit in the organizational hierarchy.

Chapter 2

**MOVING  
YOUR  
GROUP  
ONLINE**

**Unlike a face-to-face meeting with a full agenda the group workspace never runs out of time.**

Every group will experience the shifts in roles among members as they go online in different ways. Working online will build a feeling of openness within the group and a sense of always knowing what is happening. Be aware that this may feel unsettling to some and liberating to others.



## The Workplace That Never Sleeps

Unlike a face-to-face meeting with a full agenda the group workspace never runs out of time. This may sound daunting, but what it really means is that your group can make the most of round-the-clock access to your shared workspace and the people in it. Groups regularly defer items from face-to-face meetings to be finished online by the group. For example, your group can establish a framework and individual responsibilities for a particular project in a face-to-face meeting, and leave the working out of the logistics to the electronic workspace. Similarly, as your group prepares for a face-to-face meeting they can use the online space to share items in advance of the meeting. This can include everything from using the space to coordinate meeting times and locations, to sharing information items online and posing questions for people to consider, to figuring out who is bringing the refreshments.

Chapter 2

**MOVING  
YOUR  
GROUP  
ONLINE**

Groups that work this way remark on how helpful it is to have the shared workspace to support them in coordinating their efforts. (See Chapter 6 for step-by-step examples of how your group can use the workspace for specific activities.)

Active workspaces for closed groups usually carry expectations which include regular monitoring and posting in the conference or regular items posted by members with specific responsibilities. Because your workspace is open 24 hours a day, 7 days a week, you can do your part when it's convenient for you. Your group can take advantage of this feature of online collaboration tools to control and manage your work together, and the information you need to get your work done.



Chapter 2

**MOVING  
YOUR  
GROUP  
ONLINE**

# Setting Up Your Workspace



Chapter 3



# Setting Up Your Workspace

Online group workspaces require some assembly before you can start using them. In this chapter we present the nuts and bolts your group needs to put together to work online:

- information about accounts and access
- instructions for setting up conferences, mailing lists, and conferences linked to mailing lists
- setup considerations for designing a workspace best suited to your group's needs
- testing procedures to make sure your space is working
- initial messages to get your group started
- a schedule for launching your space

When you're done with Chapter 3, all of the pieces of your workspace will be in place and you'll be up and running!



Chapter 3

**SETTING UP  
YOUR  
WORKSPACE**

**Your group  
may be  
spread out  
across the  
country or  
around the  
world, and  
it's likely  
that each  
person will  
have a  
unique  
way of  
connecting.**

## What Your Group Needs to Get Started

There are two main things that need to be set up before your group can actually begin to work together online: access to the workspace, and the workspace itself.

### Internet Access

Whether you've chosen a mailing list, conference, or hybrid conference-mailing list workspace, each group member needs access to the Internet, whether from the office, using a FreeNet account, or from their personal account at home. This means each member must have a computer, modem, phone line, and an Internet account at their disposal. Your group may be spread out across the country or around the world, and it's likely that each person will have a unique way of connecting. You'll need to keep this in mind when you begin to use your workspace. You may need to help some members find out how to connect to your workspace from where they're based.

### Access to the Workspace

What each person needs to access the workspace depends on the type of workspace you set up:

**For a mailing list:** each participant needs to have an e-mail address (which is automatically included with their Internet access) with *any* Internet service provider.

**For a conference:** each participant will need a "conference access" account from Web Networks.

**For a conference linked to a mailing list:** each group member has the option of participating using their e-mail address (for the mailing list version of the space) or using their Web Networks conference access account (for the conference version of the space).

## Setting Up Your Workspace

If you haven't yet decided which type of workspace your group will use, see the Overview of Group Collaboration Tools in Chapter 1. For optimal group collaboration, a conference is best. Conferences are exclusive to Web Networks and its sister networks in the Association for Progressive Communications (APC). Each group member will need a subscription with an APC Network in order to get access. (See Appendices C and D for information on setting up accounts with Web Networks and the APC.)

You may find that members in your group are unable to use a conference. In this case, the second best option is the hybrid workspace: a conference with a mailing list attached. Although less conducive to focused group collaboration, mailing lists are very popular because they are e-mail based, and therefore familiar. In this section, we provide instructions for setting up each of these types of workspaces, and an overview of the options you have for customizing your workspace.

## More About Conferences

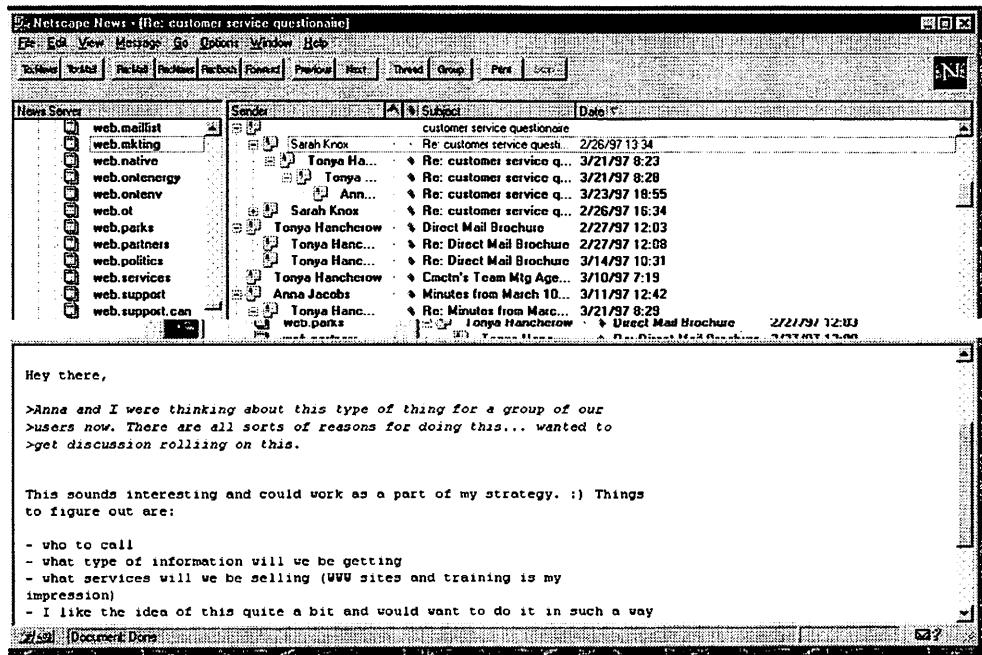
You'll notice as you read further, that there are many more pages devoted to advice on setting up mailing lists than for conferences. That's because conferences are just about ready to go "right out of the box". Their sole purpose in life is to be centrally accessible group workspaces, like a mini-intranet. So, you don't have to spend a lot of time figuring out how to adapt them to work as online collaboration tools, because that's what they are already. All you really need to decide is who's invited.

If at all possible, we recommend you do whatever it takes to convince your group that a conference is the best idea for a collaborative workspace... because it really is! Here's why:

You get the "big picture" with conferences: Take a look at the screen shots here. Whether you use Netscape, Free Agent or text-only access, with just a glance at the index, you can immediately see what's going on in your group workspace. It's easy to see which topics are active by looking at the number of responses. And you know right away if there are new topics or responses to read because they are marked as unread.

We  
recommend  
you do  
whatever it  
takes to  
convince  
your group  
that a  
conference is  
the best  
idea for a  
collaborative  
workspace.

## Netscape



Chapter 3

**SETTING UP  
YOUR  
WORKSPACE**

Your conference can be local to Web Networks, or you can set it up to be carried at Web's sister networks across the APC.

## Free Agent

The screenshot shows the Free Agent application window. On the left, a sidebar lists "Subscribed Groups" with categories like web.announcements, web.clients, web.docs, web.jobs, web.mailing, web.of, web.services, web.trainers, web.workspace, webbitk, and webops. The main pane displays a list of messages under the heading "Status" and "Subject". A specific message is highlighted: "73 1. What is the CRC? (The 5 Dimension Model) [John Hall, 6/3/97 12:37 PM]". Below this message, a detailed view shows the subject line and several replies from "Mark Surman" and "John Hall". The message body discusses the CRC's various faces and how they interact. At the bottom of the message view, there is a note about "A PLATFORM FOR MEMBERS" and a status indicator "Online".

Chapter 3

## SETTING UP YOUR WORKSPACE

## Text-Only

act.cuts.facilitators			
11/22/95	1 Sign In Please!	8 lrykert	
11/23/95	2 About this Conference	lrykert@web.UUCP	
	3 Facilitators' Coverage	38 lrykert@web.UUCP	
	4 act.cuts.ont student placement	3 simon	
[jump to newer postings...]			
9/13/96	39 New Student Starting	2 lrykert@web.apc.org	
	40 Links to Days of Action	lrykert@web.apc.org	
9/18/96	41*1000 topics!	1 maureen	
9/24/96	42 I'm here!	2 actont	
10/25/96	43 Days of Action coverage	actont@web.apc.org	
	44 Days of Action coverage	1 actont@web.apc.org	
10/30/96	45 multiple postings: same material	6 lrykert@web.net	
11/11/96	46 Double postings	2 actont@web.apc.org	
11/15/96	47 Off line	actont@web.apc.org	
11/19/96	48 on-line	actont@web.apc.org	
1/21/97	49 Moving to Automation...	11 lrykert@web.apc.org	
1/23/97	50 suggestion for new Conferences	2 lrykert@web.apc.org	
1/27/97	53 act-cuts-ont-L: machine or person	1 lrykert@web.apc.org	
4/16/97	54*Issue - Mounting act-cuts-ont	3 lrykert@web.apc.org	
***** End of Topics *****			

**With a conference, everything is organized for you: there's one place to look for all your group's messages.**

The picture's in focus, too: The topic/response system in Web Networks conferences makes it easy to follow the discussion on any particular topic. A single posting is called a 'topic.' The act.cuts.ont conference might include a topic about cuts to Ontario's child care system, for example. Other Web Networks users can then add their own comments or ideas to that topic. This is called a 'response'. So, someone from Alberta might respond with information about how child care cuts have affected that system. Not only is the discussion easy to follow, it's easy to find when you come back looking for a particular item. (Note: some people refer to a series of postings on a particular topic as a "thread".)

**Everything's all in one place:** With mailing lists, you end up with messages scattered all over the place in your mailbox. With a conference, there's one place to look and that's where all the messages are. You don't have to organize it, that's already been taken care of. Your group's work is instantly archived and becomes an immediate resource. If you have something to add, you can post directly into the conference. Even if you archive your mailing list, you can't post messages when you're looking at the archive. You have to go digging around in your mailbox to find the message you want to respond to.

Chapter 3

**SETTING UP  
YOUR  
WORKSPACE**

**Restricting access to a list is particularly important if your discussion is sensitive, and you need to protect the participants and help them to feel safe.**

You use it when you want to: You go to your conference when it's convenient for you. Many people believe that mailing lists are easier to use because messages come to you directly in your mailbox. As the number of mailing lists proliferates however, users are getting frustrated with overflowing mailboxes and are seeing the value in taking the extra step to use a conference. Because you choose when you want to participate, you are able to set aside time for your group and be in the right frame of mind for that interaction. Conferences are a way to help you control the amount and quality of information you have to deal with at any given time when you use the Internet.

There are numerous group process advantages to using conferences over mailing lists. Bear these in mind as you read the next sections on how to set up your online workspaces.

### **Setting Up A Conference**

It's easy to set up a conference with Web Networks. You need to fill out a conference setup form with some general information such as: name of the workspace, contact information for the facilitator, and the purpose of the conference. (See Appendix B for a sample Conference Request Form.) There are some options to consider when you set up your conference:

#### **Community or Private?**

You can choose to make your conference open to all Web Networks users, or you can restrict access to just those people who need to work together. For a community conference, you will need to provide a description of the purpose of the workspace that will appear in the public list of conferences. If private, you can either provide Web Networks staff with a list of the IDs of the users that need access, or you can add them yourself. (Instructions for doing this are provided in Appendix A). There is a small one-time setup charge for private conferences, check with outreach@web.net for details. Community conferences are free.

#### **Networked?**

Your conference can be local to Web Networks, or you can set it up to be carried at Web's sister networks across the APC. (See Appendix C for a global list of APC Networks.) You will need to tell Web Networks staff which other APC Networks should carry the conference, and they will arrange the networking.

Complete the Conference Request Form, and submit it to the Web Networks staff. (See Appendix B for a sample Conference Request Form.) You will be notified when it is ready for use. It usually takes about a week to get a conference set up, and a little longer to make sure it's networked to the other APC systems if you have requested that.

### **Setting Up A Conference Linked to a Mailing List**

You should follow the steps for Setting up a Conference and include on your conference request form that you would like your conference linked to a mailing list. (There may or may not be a place to do this on the form. Just indicate at the top of the form that you want the workspace in both conference and mailing list formats.

Provide contact information so that Web Networks staff can get in touch with you if they have questions.) You'll also need to follow the steps below for Setting Up a Mailing List.

### **Setting Up A Mailing List**

Mailing lists come with a lot of customizable options, so there are a number of decisions you'll need to make with your group about how you want your mailing list to work.

#### **Quick Clarification of Terms**

- The “listowner” is the person technically administrating the list who receives automatically generated e-mail messages from the list software. (This is not necessarily the same person as the facilitator, and you can have multiple listowners.)
- A “list subscriber” is someone who has signed up to the list to participate.
- The “list server” is the computer (at your Internet service provider) that operates all of the mailing lists they carry.

#### **Which Software?**

First, you'll need to find out which mailing list software you'll be using. Listproc, Majordomo, and Listserv are the three most commonly used. It's likely that your ISP will only run one type. They all perform basically the same functions, so here we've just provided an overview of some of the issues you'll need to deal with when setting one up. Service providers usually charge a one-time set up fee to create mailing lists.

You can find more detailed information on each type of mailing list software online:

#### **Listproc**

<http://www.uta.fi/ohjeita/listproc/owners.html>  
<http://ac.acusd.edu/html/USD/MailingLists/mailinlists.html>  
<http://list.u.washington.edu/Manuals/description.html>

#### **Majordomo**

[http://docuspace.uchicago.edu/g\\_maj-adm.html](http://docuspace.uchicago.edu/g_maj-adm.html)  
<http://www.greatcircle.com/majordomo/>

#### **Listserv**

<http://help.unc.edu/cgi-bin/getdocs?docnumber=ieg02>  
<http://www.lsoft.com/listserv-powered.html>

(Note: These addresses are subject to change, but were accurate at the time of publication.)

#### **Archiving Your Group's Work**

Before launching your list, we recommend that you arrange to have your mailing list archived so that you have an ongoing, centrally accessible record of your group's work. Most list software includes an archiving function, but not a user-friendly one.

We  
recommend  
you arrange  
to archive  
your mailing  
list so you  
have a central  
record of your  
group's work.

Chapter 3

**SETTING UP  
YOUR  
WORKSPACE**

**Mailing lists can be configured in a number of different ways – consult with your group to make these decisions.**

For example, Majordomo keeps “log” files of each month’s postings that subscribers can retrieve by e-mailing a request to the list server. If your list is an active one, this log file can be huge, and difficult to sort through. Check with your service provider to see which mailing list archiving tools they offer. For example, Web Networks offers a “hypermail” archive tool, which takes a copy of each posting and stores it on a WWW page for reference. There is a charge for this service, but it’s well worth it in terms of the long-term development of your online collaboration. Make sure the service provider knows to synchronize archiving with the launch of your list, so that they both start at the same time.

#### Filling out the mailing list request form

Tell your Internet service provider that you want to set up a mailing list. They will probably give you a standard mailing list setup form to fill out. (See Appendix B for a sample form.) Mailing lists can be configured in a number of different ways, depending on the settings you choose. Which you choose depends on what your group is intending to do together online, and whether it’s a public or private group. We recommend you consult with your group first in making these decisions. And, don’t worry, these decisions are reversible — you can always adjust them after your mailing list has been set up.

Each mailing list software program uses slightly different commands to perform similar functions. Here’s an overview of the most important list settings and how they will affect your workspace. You’ll need to consult the instructions for your particular mailing list software to determine how to set each of these settings:

**Name:** Choose an easily recognizable, brief name for your list. Some lists are named for the organization sponsoring the list, e.g., *womenspace@yorku.ca*, a list for online women’s activists sponsored by Women’space magazine. Others refer to what the list is about: e.g., *DEVEL-L* is a list to discuss technology transfer in international development.

**Listowner:** You’ll need to specify the e-mail address of at least one person who will “own” the list. The responsibilities of the listowner include: subscribing and unsubscribing people (if it is a closed list), dealing with “bounces” (messages that don’t make it to the list properly for technical reasons) and other list administration work. The amount of work depends on how active your list is and how familiar your users are with mailing lists. The listowner is given a password for doing this work. You can specify more than one listowner, which is often a good idea, especially for a large list. First you should determine the task breakdown, as each person designated as listowner will receive the same messages from the software. See the Co-Facilitation section in Chapter 4 for ideas on how to work together.

**Digest:** Many list subscribers prefer to receive the list messages in one summary message rather than as they get posted to the list. The summary message is called a “digest.” There are different ways to “digest” your list, depending on which mailing list software you are using. With some, it’s up to the user to send a command to the list requesting the digest version. With others, you set up a separate list. For example, there are two versions of the *act.cuts.ont* list: *act.cuts.ont-1* where subscribers get each message as it is sent, and *act-cuts-ont-digest* where people get one message per

day of all that day's messages. You can also set the size of the digest messages. We recommend 40K or lower because some ISPs don't allow incoming messages over this size. (If there is more than 40K to be "digested" on a given day, the remainder is sent in additional messages up to 40K.) The message content of both the regular version and the digest version of the list is exactly the same, it's just the timing of message delivery that's different.

**Restricted Access:** When your mailing list is set up as "restricted," each subscriber has to be "approved" by the listowner before being allowed in. Across the Internet, there have been increasing problems with non-restricted lists being "attacked" (also known as "spammed") by pranksters who flood the list with irrelevant or disturbing postings. As a result, many service providers no longer allow you to set up non-restricted lists. Even if they do offer non-restricted lists, we recommend you set yours up as restricted, because although this means more work for the listowner (having to approve each new subscriber), if your list is open to subscribers only it's safer from troublemakers.

Restricting access to a list is particularly important if your discussion is sensitive, and you need to protect the participants and help them to feel safe, e.g., a mailing list for victims of spousal abuse. Also, if your list deals with a controversial subject such as abortion or anti-racism it will be a target for troublemakers. If your list is being set up for a closed group, you'll know in advance who is supposed to have access, and will approve only those subscribers, and ignore any others who try to gain access. If it's a public one, it's rare that you'll know who all of the subscribers are so approving them is more of a rubber-stamp process. However, if any of them continuously ignore the ground rules of your list, or make everyone uncomfortable, the listowner can unsubscribe them based on the group's ground rules.

**Moderated vs. Unmoderated:** One way of managing the activity in your list space is to "approve" each message before it gets posted. This is a lot of work for the listowner, particularly on an active list. This has been used as a way of controlling the types of postings that make it onto the list. However, as long as you are clear with your group about the purpose of the list and how it will function, and if you have set it up as a restricted list (see above), we recommend that you not set the list to be moderated. Many newcomers to mailing lists and online collaboration are already hesitant about doing their first postings, without having to worry about every posting being approved by the listowner. Knowing their postings will be scrutinized makes some people reluctant to post at all, which is counter-productive. We recommend you start your list unmoderated, and only if you find a need to keep strict control of what gets posted would you consider moderating the list. One example where moderation does make sense from the start is if you are running a "news bulletin" type of list, where you need to make sure that every posting is relevant to the news topic.

We  
recommend  
you set your  
list up as  
restricted, to  
keep it safe  
from  
troublemakers.

Chapter 3

**SETTING UP  
YOUR  
WORKSPACE**

**Your “info”  
file states  
the purpose  
of your list  
as well as  
other  
pertinent  
information  
for  
subscribers.**

**Advertised:** If yours is a public list, you can set it up so that the name and a short description appear in a public “list of lists” that everyone on the Internet has access to. If it’s a private list, you probably won’t want to do this, so you would choose that advertising be turned “off.”

**Who’s On:** You can set it so that the list of addresses subscribed to your list is available to anyone on the Internet, even those that aren’t subscribed to your list. If yours is a private list, we recommend you not do this. Alternatively, you can make the list of subscribers available only to those who are subscribers.

**Your “info” File:** Every mailing list has an “information” file attached to it. Each new subscriber receives a message with this “information” in it when they subscribe. This is the place where you outline the purpose of your list as well as any other information that is pertinent to your subscribers: how the list will function, what the settings are (for example, if it is moderated people should know), how you expect the group to work together, how to find and use the archives, etc. Your info file is not a permanent document. You can update it as your list evolves. It’s a good idea to check your info file once a month or so, to see that it’s still relevant.

Here is a sample info file:

```
Welcome to the gk97-gender mailing list!

To catch up on what's been going on...
Archives of this mailing list are available at:
http://www.igc.apc.org/gk97/gk97.gender/

The purpose of this facilitated global discussion is to ensure
that Gender and Information Technology issues are considered and
addressed leading up to and after the face-to-face Global Knowl-
edge '97 Conference taking place June 22-25, 1997 in Toronto,
Canada. Our goal is to develop a Gender and IT platform to bring
our collective voices to GK'97.

Be sure to sign in and tell us about yourself, your work, your
gender and IT interests and experiences!

Please see the introductory documents, summaries and reference
materials for this discussion in English, Spanish and French at:
http://community.web.net/gk97/resource.htm

::: To Post Messages

To post a new message to the discussion, address it to:
gk97-gender@igc.apc.org

If you are responding to someone else's posting, please make
sure the Subject heading is the same as the one you're replying
to, so discussion stays relatively coherent.

Note: This mailing list is also linked to a conference called
gk97.gender on APC Networks. If you have an account with an APC
```

*continued on next page*

Chapter 3

**SETTING UP  
YOUR  
WORKSPACE**

network, you may prefer to access the discussion that way.

**::: Collaborating Effectively**

To keep this a productive workspace, we ask you to observe three rules:

1. Messages must be relevant to Gender and IT topics.

2. Please treat each other with respect.

3. When you would like to have a personal discussion, or if you feel offended by a particular message, please send a message to the individual involved only.

**::: General Usage Guidelines**

o Please introduce yourself in your first posting: tell us about yourself, the organizations you work with, your experiences with gender and IT, your interest in particular topics, etc.

o Try to keep postings concise and short, ideally two screens worth or less.

o Please do \*not\* keep the body of the original text in your replies, except as absolutely necessary. Access and down-loading charges are particularly expensive in the South.

o Use a descriptive Subject header to identify message content. That way, people can more easily decide which messages they want to read. When you respond to a message, keep the original subject heading intact unless it is no longer relevant to your message content.

If you have questions, concerns or suggestions about the operation of this list, please direct them to [maureen@web.apc.org](mailto:maureen@web.apc.org) (English Facilitator) or [luch0@web.apc.org](mailto:luch0@web.apc.org) (Spanish and French Facilitator).

Remember that, unlike using a conference, on a mailing list participants see messages *as* they get posted. If they subscribe a few weeks after the list starts, they will have missed all of the initial postings. Make sure your info file addresses everything a newcomer would need to know, so that they can catch up quickly. Also, if you have set up archiving, make reference to where the archive is located and how to use it so that new subscribers can see what has transpired.

**Password:** Each mailing list is set up with a password that only the listowner(s) know, to ensure that they are the only ones able to make changes to the list settings. Choose one with a combination of upper and lower case letters, and numbers. For example, your list password might be: Dm7vYa

**Reply-To:** You have a choice of having reply messages go directly to the list address, or to the person who posted the message being responded to. Most often, lists are set up so that replies go to the list directly. This ensures continuity and transparency of discussion.

**Before you start using your workspace, you need to spend some time thinking about how you want it to work and evolve.**

**Signature File:** It is a good idea to create a signature file which is included at the end of each message posted to the list. It can contain information on how to unsubscribe, or how to find a related web site for the group, or who to contact if people are having problems. The signature file is particularly important for large, public lists.

Here is a sample signature file:

```
=====
To unsubscribe, send mail to majordomo@list.web.net with no subject,
with the following message: unsubscribe act-cuts-ont-digest
For help, e-mail: cutshelp@web.net
WWW: http://community.web.net/act.cuts.ont
=====
```

### Communicating Changes to List Settings

Let your group know if you are planning to change the settings on the list. If for example, you switch your list from being a public one to a private one, or from moderated to unmoderated, you'll need to give advance warning to the people already using it, and you'll need to provide an explanation as to why you are altering the settings. It's good to go through a process with the group before making these types of decisions, so that they don't come as a surprise. Often, the impetus for these changes comes from the group itself, in response to things that happen within the list.



### Dealing with Techies: A word of warning...

At some point in setting up or operating your workspace, you may come into direct contact with a "techie." A "techie" is someone who works with the machines and systems where your workspace is located (e.g., at your local Internet service provider). If your account is with a large service provider, you probably won't have to deal directly with a techie. But if you're with a small operation, the techie may be the one who does everything.

Understandably, techies tend to be more concerned with the smooth functioning of their systems and with streamlining operations, than with how their system will be used for social processes. And when it comes to setting up mailing lists and conferences, they tend to want to impose their ideas about how these spaces should be set up, especially if it will make their lives easier. As you've seen with mailing lists in particular, there are a range of possible settings that can be selected when the space is first set up. You'll spend some time with your group carefully making these decisions, and will know what your group needs. Be very clear on your application form about how you want things set up, and when you've been notified by the service provider that the space is set up, be sure to check that they have indeed set the settings the way you requested them.

Often techies will second-guess you because they don't understand why you would want things set up a certain way. If you're unsure about what they've done, ask the techie to explain why they made the changes and what impact they will have on

**You want to make your group area a welcoming one where participants feel supported.**



## Preparing Your Workspace

Before you start using your workspace, you need to spend some time thinking about how you want it to work and evolve. You won't be able to anticipate all the possible things that might take place in your workspace, and you won't know how the group will react until you actually start working together online, but this section will help you get your workspace off to a good start. Note: There are timing considerations for conferences that are different for mailing lists, so keep your particular type of workspace in mind when reading this section.

### Initial Messages

You want to make your group work area a welcoming place, and one where participants feel supported. Before you open it up to everyone, make sure you're ready with a few postings. There's nothing worse as a new user than finally getting connected and finding no messages to connect to. If your group is using a conference, you can post these initial messages as soon as you have them ready, and newcomers will see them when they go into the conference. If you're using a mailing list, or conference joined to a mailing list, you should stagger your initial postings so that list subscribers don't miss out on too much at the beginning. (Note: If you have set up a WWW archive for your list, you can point stragglers to that site so they can get caught up. See Archiving Your Group's Work on page 53).

We recommend you start out with the following initial topics:

**Welcome:** Post a friendly "you've found it, you're in the right place" topic.

**Purpose:** The purpose topic is where you set the stage for your group's online work. Ideally this posting should be brief (one or two screens at the most), and should outline what the space is for and what you hope to achieve. If you're running a mailing list, you can post this information to the list and include it in your "info" file, as well.

**Sign-in:** This is where people introduce themselves as they arrive. Not only is it good for the facilitator to see who's arrived and who hasn't, it's nice for everyone in the group to see who else is using the space. This topic is particularly important for people who aren't familiar with each other — they can introduce themselves and provide personal or professional context. Of course, don't forget to be an example to everyone else by signing yourself in!

Chapter 3

**SETTING UP  
YOUR  
WORKSPACE**

**How to Use this Space:** This posting outlines guidelines for cooperative and productive use of your shared workspace. Again, you would include this information in your "info" file if you're running a mailing list.

Here are some samples of initial postings that you can use to model your own:

**Sign-In:**

```
/* Written 8:34 AM May 1, 1997 by maureen in web:gk97.gender */  
/* —— "Please Sign In!" —— */
```

Please sign in and tell us about yourself, your work, your gender and information technology interests and experiences, etc.

**Welcome:**

```
/* Written 8:37PM May 28, 1997 by maureen in web:gk97.lessons */
```

Encouraging people to do their work online can be challenging. In many cases, all that's needed is concrete examples of the kinds of things that are possible electronically. The Association for Progressive Communications (APC) has been working with NGOs and civil society since 1990 to support their online collaboration efforts. Over that time, we've helped all sorts of groups turn their communication and collaboration ideas into reality. Now we'd like to share some of those stories, the successes and the lessons learned, to facilitate the online transition of ever more organizations and movements.

As part of the information-sharing around the Global Knowledge '97 conference taking place in June in Toronto, Canada, the gk97.lessons space has been set up to be a repository of case studies of how different organizations and projects have used APC Networks to get their work done. Between now and September, we will be posting examples for you to learn from and respond to. You may also want to tell us about your own experiences, either as a participant in any of the projects we describe here, or from beyond the ones presented here. We welcome your questions, observations, and ideas.

We would also like you to feel free to share these examples widely, in order to encourage others to work together online.

Welcome to gk97.lessons!

Chapter 3

**SETTING UP  
YOUR  
WORKSPACE**

## Purpose:

```
/* —— "Purpose of This Conference" —— */
```

This conference is for internal APC and Web Networks discussions about the Global Knowledge 97 conference taking place in Toronto from June 22 to 25. It will primarily be used to coordinate the APC Virtual Conferencing Project funded by CIDA and IDRC.

Cheers ... Mark

## Facilitator Sign-In:

```
/* Written 8:48 AM May 1, 1997 by maureen in web:gk97.gender  
*/
```

Hi everyone!

I'm Maureen James, English facilitator of this GK97-Gender discussion. Which means it's my job to make it possible for us to work together here to make our voices heard at the GK97 event in June, and to keep our dialogue going after the event. I'm working closely with women's networking specialists to prepare Focus Pieces for this discussion to help us identify key issues to build our strategy, and will be making links between our discussion here and other GK97 discussions taking place elsewhere. I encourage you also to bring relevant threads here for us to work on.

Please let me know if there's anything you need, just e-mail me at [maureen@web.apc.org](mailto:maureen@web.apc.org).

My background is in working with non-profit organizations in Canada to help them make productive use of computer networks. From 1988 to 1996 I worked at Web Networks (formerly NirvCentre) in Canada with a team of people doing neat things to make the Internet a place where social change can happen. I'm now working independently, but still closely with Web Networks and the Association for Progressive Communications on a number of projects including this one. Since the Beijing process, my work has had a particular emphasis on working with and supporting women's organizations, particularly through the WomensWeb program at Web Networks.

I'm looking forward to the discussions we'll have here!

Maureen James  
APC GK97 Facilitator

Chapter 3

**SETTING UP  
YOUR  
WORKSPACE**

**Before  
opening  
your  
workspace  
to everyone  
you should  
check that  
everything is  
in good  
working  
order.**

**Note to Mailing List Users:** You should consider re-circulating some of the initial postings from time to time, especially to remind participants of the goals and ground rules of the group. Another way to ensure people receive these is to include them in the mailing list "info" file which goes out to each new subscriber when they sign up. Or, if you have your list archived to a WWW site (highly recommended!), you can point your subscribers there periodically.

### **Before Going "Live"...**

Before you announce to everyone that your space is open and ready for business, you should check that everything is in order.

#### **• Find your workspace**

The first thing you'll need to do before going live is find your workspace (so you'll be able to tell others how to find it!) and make sure it's working.

If you're using a conference, there are two ways to get to it:

1. Using the graphical interface (with a WWW browser such as Netscape or Internet Explorer). This is the most common way of using conferences.
2. Using the text-only interface. Usually used by people with older equipment.

**Graphical:** Open your newsreader (make sure it has **conferences.web.net** set as a news host), and from the Web Networks Community Resource Centre home page, select **Confs** from the tool bar at the bottom of the page. On the next page, choose **Start Reading Conferences**, and your newsreader will open up. You'll need to get the full list of conferences from Web Networks, and then subscribe to your own so you will see it each time you open your newsreader.

**Text-Only:** Telnet or direct-dial to Web Networks, and log in with your ID and password. From the Web Networks main menu, choose **c** for conferences. At the **Conf?** prompt, type the name of your conference. This is what you'll see:

```
Web Commands:  
c      - Conferences  
m      - Electronic Mail  
t      - Textbase: Full-Text Database Search Service  
i      - Internet Services  
u      - User Directory  
s      - Setup: Change your Password, Language, Terminal Type  
bye    - Exit from Web  
  
Your selection (? or 'h' for help): <ENTER>  
Conf: (l)ook for a conf, (v)isit your list, type name of conf:  
Conf? women.news  
Type '?' for list of commands, 'h' for help.
```

Note: For more detailed instructions on using Web Networks conferences, please see the “*Community Resource Centre*” guide. (Each Web Networks subscriber receives a guide when they sign up.)

### If you’re using a mailing list...

The easiest way to find out if your mailing list is alive and kicking is to subscribe yourself to it and see what happens.

### If you’re using a conference linked to a mailing list...

You should follow the advice for both conferences and mailing lists, as above.

### • Try Using Your Workspace

When posting to a group workspace for the first time, many people feel scared or worried. You might be thinking: What if I break something? How do I delete? Overcoming the fear of the first posting can be a hurdle. To make it easier, try composing your first posting and sending it for review as an e-mail message to someone you know has some workspace experience or to the friendly staff at Web Networks. Getting a little encouragement and some helpful tips will make the first leap less scary. Remember, you are not alone in feeling nervous about your first posting. Even the most experienced facilitators remember their very first posting to a group.

**For Conference Users:** Web Networks provides the **test** conference as a practice area where you can try posting topics and responses, plain-text files and attachments, file transfers, and more, before posting directly into your own conference. No-one actually reads the **test** conference so you can feel free to experiment. Once you’re actually posting directly into your own conference, it’s a good idea to check your postings after you’ve entered them to make sure they look okay and are readable.

**For Mailing List Users (including conferences joined to mailing lists):** Unlike with conferences, there is no easy way to do a trial run before launching your mailing list. One option you should consider is finding a pilot group to be your guinea pig list subscribers. You can subscribe yourself to other lists to see how other listowner-facilitators do their work. (Of course they won’t necessarily have read this guide, so you’ll have to judge the facilitation you see going on by your own experience of good facilitation.) And you can try posting to these groups (if you have something related to the topic to say) to see how it feels, and to see what happens. But there is no “**test**” mailing list the way there is a **test** conference.

Before announcing your list to the group, you should subscribe yourself to it to see if you’re happy with the “info” file. Doing this also ensures that the subscription process is functioning properly. If you’re running a restricted list this allows you to try out the subscription approval process.

**For conferences joined to mailing lists:** Once subscribed, you should check to see that the link between the conference and mailing list is working. To do this, you can either post something in your conference, or post something to your list... either will do the trick. You don’t need to post the same message to the two spaces, since they are linked. Be aware that there is a time lag from the conference to the mailing list and vice versa, of about 20 minutes.

**Web Networks  
provides  
the “test”  
conference as  
a practice area  
where you can  
try posting  
topics and  
responses.**

Chapter 3

**SETTING UP  
YOUR  
WORKSPACE**

**Just as you  
make sure  
people know  
about a  
face-to-face  
meeting or  
event before it  
happens so they  
can prepare,  
you should  
make sure your  
group knows  
when the  
workspace will  
be open.**

Here is a sample test posting for a conference linked to a mailing list:

```
Topic 1 Test Mailing List to Conf      7 responses
maureen apc.wcw.40+          10:33 AM Mar 25, 1997

apc.wcw.40+

Hi - this is a test posting to the apc.wcw.40+ conference, to
see if those on the mailing list can read it... say "hi" if you
can! Thanks

Maureen
```

When running a conference linked to a mailing list, you should be sure to subscribe yourself to the mailing list, at least for the first few weeks, so that you can see both versions of the workspace. Knowing how they each work will help you support both types of users.



### **Staging the Launch of Your Workspace**

Just as you make sure people know about a face-to-face meeting or event before it happens so they can plan and prepare, you should make sure your group knows when the workspace is going to be opened. This will give them time to make sure they have what they need to start using it right away.

Here are some preparation strategies:

#### **1-2 Weeks Before Launch**

- Send an e-mail message to everyone you are expecting to participate in the workspace letting them know what it's for and when it will be open. Invite them to seek any last-minute technical assistance and tell them where to get help. Request a response to your message, just like an RSVP. Call the people you don't hear from within a week to see where they're at.



Chapter 3

## **SETTING UP YOUR WORKSPACE**

### Sample message:

```
To: user1@web.net, user2@web.net, user3@web.net, user4@web.net,  
user5@web.net  
From: Maureen James <maureen@web.net>  
Subject: workspace coming up!
```

Hey everyone...  
Just wanted to remind you that our private workspace for planning the fall conference is just about online. Let me know if you need any help getting connected. I'll send you another message when everything's ready to roll.

Maureen

- At a face-to-face meeting of your group, distribute a flyer announcing your workspace and how to access it.

### A Few Days Before the Launch

- Make sure you have your initial postings ready.
- Make sure you have your mailing list “info” file completed and installed.
- If you’re running a private conference, check the conference permission list to see that everyone who needs access has it. If IDs are missing, add them. (See Appendix A for instructions.)

### Launch Week

- If you’re running a mailing list, remind people to subscribe right away so that they don’t miss any of the initial postings. (You can also subscribe everyone in the group yourself, to get things started on time. If you decide to do this, let everyone know in advance.) If your list is “restricted,” the listowner should be on call to do lots of “approvals” during the first few weeks, and should check in at least twice per day to subscribe newcomers.
- Send a friendly reminder to everyone to drop in. You could even schedule an “open house” on a particular day for people to check in and leave an introductory message.

Chapter 3

**SETTING UP  
YOUR  
WORKSPACE**

**As new  
participants  
introduce  
themselves,  
welcome  
them.**

Here's a sample launch message:

```
/* Written 11:06 AM Apr 30, 1997 by maureen in web:apc.unwcw */
/* ——"GK97-GENDER launched today!" —— */
```

Hi everyone... We're launching the gk97.gender conference/  
mailing list today... I'll be putting the first postings in this  
afternoon, and hope to see you all participating as often as you  
can!

For those wanting to access the mailing list, do the following:

Send a message to: majordomo@igc.apc.org  
Leave the Subject line of your message blank  
Include only the following text: subscribe gk97-gender

Our plan is to take the results of the discussion to the GK'97  
event in Toronto (June 22-25, 1997) and present them in all the  
forums that APC and our other gender&IT-colleagues have access  
to, so it's really important that we use this opportunity. Since  
NGO and women's involvement in the actual face-to-face event is  
pretty minimal, we need to do as much as possible beforehand  
online so that APC can strongly represent NGO and gender net-  
working voices at the event.

I'll post the official public launch announcement here as a  
response.

Also, please feel free to e-mail me if you have questions or  
concerns!

Maureen

- Start your routine of checking in daily. (See the 15-Minute Facilitator section in Chapter 4 for more on your "facilitation routine.")
- As new participants introduce themselves, welcome them.
- If yours is a public workspace where the general public is invited to participate, during launch week (not sooner) you can do some online promotion of your discussion area in other related online spaces. Be sure to include access instructions in your posting.

### **Opening Week Jitters: Dealing with Dead Air**

So... your workspace is all ready. You've posted some initial topics. Maybe even one or two people have signed in... but where is everybody else?!?!!?

The first few weeks of a new online workspace can be nerve-wracking. You're all ready and raring to go, but not everybody's shown up yet. Or perhaps they haven't made themselves apparent yet. If you're running a mailing list where you've had to approve each subscriber, it's an eerie feeling to know you've subscribed lots of people but no-one's saying anything. Resist the urge to post an exasperated scream into the ether: "Hello - I know you're out there... SAY SOMETHING!"

Chapter 3

**SETTING UP  
YOUR  
WORKSPACE**

This dead-air scenario is less likely if you're working in a closed space with a close-knit group that has a specific agenda. These people usually will at least say "Hi!" to each other and introduce themselves. Dead air is more likely when you're running a more open space where you don't have a core group. In this case, newcomers may tend to be "lurkers" who wait until they feel comfortable with what the space is about before they post.

The best way to deal with dead air in the first few weeks is to make sure you regularly (every few days) post something that will incite discussion. Of course, what you post will depend on the kind of list you're running. For example, for a closed group you can post your own introduction and request that others do the same. Then you can post some of your initial ideas about what the group can accomplish in the space and ask for feedback. If you're working with a more open and amorphous group, you can start out with "focus" pieces with more questions than answers, intended to start discussion among participants. You may need to try a few different styles of initial postings to get something that works for everyone.

If you are expecting a particular group of people and some are missing, don't hesitate to contact them directly to see if they need assistance getting started.

It's during the first few weeks that you'll be glad you did some initial thinking and strategizing about how to make effective use of your online workspace. It will pay off with quicker participation by your group members.

**The best way to deal with dead air in the first few weeks is to make sure you regularly post things that will incite discussion.**



Chapter 3

## **SETTING UP YOUR WORKSPACE**

# Facilitating Your Group



Chapter 4



# Facilitating Your Group

And now, without further ado, may we present to you the information you've been anxiously awaiting: all about online facilitation!

In this chapter, we outline:

- how to identify the online facilitator(s) in your group
- facilitation roles
- samples of facilitator interventions
- types of facilitation
- co-facilitation: sharing the work
- ways to make sure you're supported in your role
- a facilitator's daily routine
- the Top 10+ facilitator questions

Loaded down with all of this insight, you'll feel empowered to boldly venture forth where few have gone before!



Chapter 4

**FACILITATING  
YOUR  
GROUP**

**The online facilitator must first and foremost be a “people” person.**

## Facilitating Your Group

Facilitation in online group workspaces is an emerging skill set. We have done our best to capture the most important aspects of this role. You will adapt your own skills and personality to bring your workspace to life as you begin to establish new online relationships.

In some cases who your facilitator is will be obvious because they already do this type of work offline, and the person assumes the role with ease. In other cases it may not be as obvious. Don't assume it will be the person with the most technical know-how. While this person may be technically good at using the Internet, the online facilitator must first and foremost be a “people” person. As with any selection process, you need to follow the norms of the group in choosing your facilitator.

## Who Makes A Good Online Facilitator?

Look for people who demonstrate the qualities listed below. You may not find one person who has them all, but within your group you should be able to cover all the bases. We have found that good online facilitators tend to be:

- “people” people
- self-confident
- aware of their own limitations and able to admit when they don't know something
- willing to learn while doing
- adaptable
- prepared to seek out mentors
- good at drawing people out
- good at information finding and sharing
- computer-competent
- Internet-competent
- patient
- respected
- good listeners
- good at making the most of the group's skills, assets and experiences
- able to let situations develop naturally for a while before they intervene
- sensitive to process
- attentive to the goals of the group
- enthusiastic about the possibilities of online collaboration, and not just the technology
- good at conflict mediation
- good at seeing patterns and organizing things
- non-technical, but aware of the technical context
- not uncomfortable seeing their communications in type
- efficient communicators
- audience-sensitive
- able to move freely between different online spaces
- knowledgeable about the group and their interests
- interested in building capacity

## Facilitation Roles

A major part of facilitation is making the most of the assets of the group. The facilitator will take the lead in many instances, but there are many functions that the group, once comfortable with the online workspace, can take responsibility for. Here we identify the facilitation roles that need to be filled in a well-functioning online group workspace:

**A facilitator must listen, intervene where necessary then stand back.**

### Social Catalyst

Each workspace needs someone who encourages and gently guides discussion. The skills required to do this are the same as in offline facilitating. A facilitator must listen, intervene where necessary, and then stand back. If the discussion is not flowing in a conference, it is the facilitator's job to get it rolling.

### Host

Everyone should feel welcome and at ease in the workspace. Participants should introduce themselves to ensure a comfortable level of familiarity in the group. This will make discussion and collaboration happen much more naturally.

This sample shows how you might welcome someone, and get them to elaborate on their experiences that are relevant to the group:

```
/* Written 5:06 PM Apr 16, 1997 by maureen in web:web.workplace */
```

```
Hi Rhonda - nice to have you with us! It's raining here too -  
which is a vast improvement over the snow-thing it was doing last  
week!  
:-)
```

```
Please tell us your exasperating tales of trying to get your  
Ottawa CED working group to really go online, or any of your more  
recent group electronic exploits...  
maureen
```



Chapter 4

**FACILITATING  
YOUR  
GROUP**

**Everyone  
should develop  
the habit of  
carefully  
reading and  
“listening” to  
each posting  
before  
responding.**

**Animator**

When there isn't much happening in the space, participants should plant ideas or start new topics of discussion. Like this one...

```
/* Written 11:13 AM Feb 26, 1997 by lrykert@web.apc.org in
web:act.cuts.ont */
```

We are seeing hospital closings all across the province - Ottawa, Brockville, London, T-Bay, ...

Do we have a complete list?

I understand Metro is sometime next week...

I think we should start a monitoring of this - Can people report on the impact of these closings in their communities? Jobs lost, beds lost, how people are supposed to make do, etc... I think we need to document this "for the record".

Liz

**Listener**

Everyone in the workspace should develop the habit of carefully reading and “listening” to each other's postings before responding, particularly in active conferences. This helps to prevent hasty responses and misunderstandings.

**Summarizer**

It helps to regularly bring together the diverse threads of discussion and to digest them into a summary that is then reflected back to the group. Summarizing serves to highlight important points and clarify the purposes of the workspace.

**Lost and Found Office**

If there are people missing from the discussion, the group should look for them to see if there are problems to be resolved. If you can't track someone down by e-mail, phone them.

**Tutor**

The facilitator and others with particular expertise should be available to answer participants' questions. Make sure all of the participants have the e-mail, phone and fax information for the facilitator.

**Chairperson**

Particularly when a focused group interaction is taking place in the workspace, such as an online meeting, the facilitator should be keeping the discussion on track. If it seems to be veering off topic, it's best to try to redirect it or suggest that it move to e-mail.

## **Message Monitor**

It's a good idea to review the information that gets posted to watch out for things like copyright infringement. Also the facilitator's postings should serve as examples of good online form, with respect to formatting, quoting style, etiquette, etc. When there are problem postings (e.g., file attachments), the facilitator should gently point out when someone has made a mistake. This can be done publicly in the conference so that others learn. Repeat problem posters can be helped in private e-mail.

Here's a sample message pointing out how to post complicated documents to the group:

**The facilitator's postings should serve as examples of good online form.**

Hi Brenda!

>It was fine to send my address for the original document.  
>Now, for my future learning. What did I do wrong? Could I  
>have done what you did?  
>Regards, Brenda

Sorry if I made it sound like you did something \*wrong\*! You couldn't have known as we haven't discussed this in the list before.

What you did was send a large, "encoded" file (i.e., something that wasn't text-only) to a large group of people. Generally, when you're interacting with a group on a mailing list or newsgroup your best bet is to post as much as possible in smaller (15 pages or less) text-only files, because \*everyone\* can handle those with no complications.

Not everyone can use encoded files. For example, the briefing document you posted was in WordPerfect 6, and not everyone uses that. Anyone who doesn't (or who doesn't have something compatible), wouldn't have been able to open the file. Also, there are different ways to send "encoded" files (e.g., MIME, UUENCODE, etc.), and if the e-mail program of the person at the other end isn't compatible with that encoding, they can't read the file without doing a lot of extra work.

So, if at all possible, text-only files are the best. You can always let people know there's a nicely formatted version available by e-mail if they'd prefer that. But in the interests of reaching the largest possible audience by e-mail and newsgroups, text-only will always take you farthest.

What I did was take out all the complicated formatting and saves the file as ASCII Text (DOS) in WordPerfect. Then I broke it into 4 separate messages because there's a 40K limit on each message posted to this mailing list.

Chapter 4

*continued on next page*

**FACILITATING  
YOUR  
GROUP**

**Every  
workspace  
will start out  
with a set of  
ground rules  
that will  
evolve over  
time.**

I'm sure this is more than you wanted to know, but I hope it helps!!! :-)

Maureen

P.S. The good thing was, that in this case, because of its size, your posting bounced to me so I was able to fix things before it got sent to everyone else on the mailing list, as I'm set up as the "list-owner".

### **Rule Reminder**

Each group evolves their own ways of working together online. Every workspace will start out with a set of "ground rules" that may be modified over time. These should be circulated periodically to remind both veterans and newcomers to the space how to treat each other. For example, here's a posting rule that participants were informed of:

```
/* Written 5:15 PM Mar 9, 1997 by lrykert@web.apc.org
in web:act.cut.ont */
```

```
/* ----- "Giving Postings a Name" ----- */
Hi All,
```

It seems like we have worked out most of the bugs on the automatic lists and the gateway to the conference. I just want to make two quick suggestions...

1. When making a response to the digest: quote \*only\* the short bit you want to include in your response and delete everything else. This will keep the messages shorter and stop eating up space in people's mailboxes unnecessarily. It also helps when reading the postings to get to the relevant part immediately.

2. When replying to a digest version of the list: \*change\* the subject line. Using a subject like "Re: ACT-CUTS-ONT-L: Re: ACT-CUTS-ONT-Digest: V1 #55" leaves people unable to guess what you are writing about. Be descriptive - it helps people to find things again.

Thanks,

Liz Rykert

Chapter 4

**FACILITATING  
YOUR  
GROUP**

**The initial planning your group does in preparing to go online will, to a large extent, determine the type of online facilitation that is required.**

### **Comfort Creator**

Often, newcomers to the space will post to the facilitator first before posting to the group directly. Many people may have had (or just heard about) nasty “newbie flame” experiences out on the great big Internet where one is chastised publicly for making a “wrong” posting. They may feel safer checking with you first to be sure that their posting is appropriate to the list. You can help them feel comfortable about making the transition to the group space.

### **Gatekeeper**

The facilitator/listowner is technically in charge of who has access to the space: using the tools that come with the workspace, they can include and exclude people as needed. Access criteria should be worked out by the group. (See the Setting Up Your Mailing List section in Chapter 3 and Appendix A: Managing Access to Your Conference.)

### **User Support Liaison**

Web Networks’ User Support staff are the facilitator’s “best friend” when it comes to finding answers and keeping up-to-date with service changes. Facilitators should maintain an ongoing dialogue with Web Networks staff and User Support.

### **Conflict Mediator**

If things get ‘hot’, ‘nasty’, or off track, the facilitator should step in and ‘cool down’ the situation. See the Online Mediation section in Chapter 5.

### **Mentor**

As you evolve into a veteran facilitator, consider supporting those within your group that seem ready and willing to take on some or all of the role. You can also make yourself available beyond your group to other new facilitators, so that they can learn from your experiences.

## **Types of Facilitation**

Group leader, social discussion animator, or coordinator? You may be expected to fill all of these roles and more. The initial planning your group does in preparing to go online will, to a large extent, determine the type of online facilitation that is required. You may find over time as you develop and grow your online spaces that each one may have a distinct feel to it, and a distinct purpose. Taking a minute to tune into the unique feel of each workspace will assist you in working with the underlying dynamics at play, and to choose interventions which are moving with the flow of the dialogue but also shaping it to move forward.

For example, one space might be the equivalent of an online library, where your group stores key documents. Facilitation here would focus on the skills required to organize and retrieve useful information in a timely way. If the space is intended to accommodate a small working group coordinating a face-to-face conference then it is more likely the facilitator will require good timing and synthesizing skills to move people to decisions. The ability to see through the first layer of the content to work with the underlying process percolating within the group is an ability which grows

Chapter 4

**FACILITATING  
YOUR  
GROUP**

**Managing discussion and information-sharing in an online workspace is quite different from doing it in person.**

over time. The type of facilitation you choose will likely change with time as the group grows together and as individuals begin to share facilitation responsibilities. You may begin with one type of facilitation and then move on to accommodate the changing needs of the group.

### **A Word About Control**

Managing discussion and information-sharing in an online workspace is quite different from doing it in person. You don't have the same tools at your disposal as you do in a face-to-face meeting, such as a finite agenda or timekeeper. How much control you exert online really depends on the nature of what you're trying to achieve. If your workspace is being used to hold online meetings, you'll need to facilitate more actively than if the goal of your conference is general, less time-sensitive information-sharing and collaboration. Your first priority should be helping everyone achieve an online comfort level. That may mean giving up rigorous adherence to rules of how, where and what gets posted. The last thing you want to do is scare off a new participant by telling them they've posted something incorrectly. Be gentle and you will keep them coming back.

### **Creating a Learning Culture**

The online world of group collaboration is a place where everyone learns, not just about the content of what they are discussing but also about how to relate to each other electronically and how to use that online work in everyday activities. What you do together as a group online is very real. Your goal is to shape the space to meet your needs.

One great advantage of the online experience is its capacity to accommodate learning-as-you-go. Consistency and open communication style are critical skills of the online facilitator. Online facilitating is very much like facilitating face-to-face. We know no one is perfect and you should expect to make mistakes. Learning to admit mistakes is an early lesson for all of us. Assuming a defensive stance will build unnecessary undercurrents within your online community. People will look to you to model acceptable behaviour online. One thing you can always count on is the likelihood that if someone doesn't like something they will let you know. Changing a position or admitting a mistake can easily be positioned as a way for everyone to learn from the experience.

The group will come to rely on you as the person who will test solutions, explain changes, move the group along in a decision making process or set a new group rule in consultation. We know you will learn facilitation skills over time as you need to know them. This will be true for the participants in the space as well. Be patient with yourself and others.

## **Co-Facilitation: Many Hands Make Light Work**

Managing online spaces continuously can create a sense of undue pressure on anyone doing the facilitation single-handedly. If you are establishing a space which you anticipate will be lively, think about sharing the online facilitation responsibilities. You may want to go on vacation or need to be away from time to time and having

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more than one person in the facilitator role means the work can be divided to ensure coverage and continuity. Review the roles the online facilitator in Chapter 4 and you will see there are many possibilities for dividing up these responsibilities.

Groups have successfully shared online facilitation as a way to both divvy up the work and to provide opportunities for people interested in learning how to facilitate online. How you divide up the work will depend on the skill sets you have already within your group, and those that you can develop. Some groups choose a co-facilitated approach because it ensures the leadership within the space remains distributed and it gives people an opportunity to try different facilitation styles. In other cases it allows people to focus on different areas: one person can concentrate on developing topic content, while another person concentrates more on the group process dynamics, for example.

Developing an open relationship among those who make up the facilitation team is very important. As co-facilitators, you need to trust each other and agree to work out differences in private if you might have handled situations differently. You may want a private workspace set up just for this purpose. One group of facilitators that we know of has a public workspace, so that participants concerned about any particular issue can simply look in to see if it is already being discussed by the facilitators. If it is not, then any member can feel free to open the discussion. A facilitators workspace can also be used to check in and out, and to let others know when you are available for monitoring and assuming the lead on responding to technical requests.

Co-facilitation is like co-leading a group of any kind. People sharing this responsibility need to be in touch regularly, be clear about the division of the work and the roles they are most effective at assuming. Ultimately it comes down to being clear you are not making assumptions about what each other is doing and that you test and clarify any concerns you have as you go along.

## **What Your Mother Never Told You About Facilitation**

Facilitation is emerging as a new area for the online community. As such it remains an area one can experiment in and try new ways of doing things. There are a few things to be prepared for which most facilitators experience at some point in their work. You may feel a degree of loneliness in your work: You are being asked to work in a very open manner and you will be exposed to criticism in ways which are rarely available to us in other workspaces. Constant public scrutiny of your work can take some getting used to. If you are just starting out as a facilitator, or are supervising one, be aware of this need for support. The concerns are very real.

You will need to seek support from other online facilitators or from face-to-face colleagues, to ensure you have a place to talk about what is happening (or not happening) online. Being able to ask questions regularly will keep you from getting stuck or frustrated. Using a co-facilitation approach can be a useful way to deal with this. Matching a new facilitator with a mentor who keeps an eye on the online space, but posts to it only rarely, is another very effective way to reduce feelings of

Chapter 4

**FACILITATING  
YOUR  
GROUP**

**Checking  
into your  
workspace  
on a daily  
basis is  
critical.**

isolation. Finding a mentor is easier than you might think. Look around online, find a group you admire and ask them how they do it. If their facilitator is too busy they will probably know of others to recommend.

## The 15-Minute Facilitator

The facilitator has a number of jobs to do, most of which can be handled in about 15 minutes a day. The amount of time you actually spend depends on the other roles you have in the group you are facilitating. If you're also the project coordinator, for example, you will spend longer in the workspace because that is where you do a lot of your work.

There are some things the facilitator needs to check every day, others that only need attention on an as-needed basis. Following are some guidelines for setting up your facilitation routine.

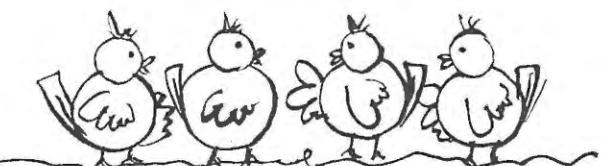
### • Daily

Checking into your workspace on a daily basis is critical. Think of the space you facilitate as a garden: each day you poke around for a few minutes, water things that look wilted, pull out weeds, and talk to your plants to encourage them to thrive. You look for new growth, and see if anything needs extra help and attention. Doing this regularly keeps things thriving and healthy. If you left it longer, you'd have a wild mess to sort through and you'd just keep putting it off. It's the same with your online workspace. You should look in every day to see if there's anything that needs your attention. The little bits of "gardening" you do every day will signal your presence to the group, and help to instill a sense of being cared for, and nurtured. Participants will soon feel safe and free to express themselves.

Things you should scan for are:

- new people: welcome them
- requests for help or information: if there's been no answer from others, see if there's anything you can do, and post a note to let everyone know you're following up
- postings that you can help further develop to get people responding

Here's an example of an interesting message that received no response because it may not be clear to the group what is being said. This is where you can help things along:



**The facilitator should ensure that there is at least one new posting a week, if it's not happening naturally from within the group.**

/\* Written 3:52 PM Jun 5, 1997 by maureen in web:gk97.gender \*/

Hi Marie-Helene,

I had a question about your message:

>In the Santiago conference on globalisation, I attended another  
>workshop on "shift from the population paradigm to reproductive  
>rights paradigm". We happen to discuss that for some issues  
>(e.g., sexuality related) and in some contexts (e.g., power or  
>institutional relationships/constraints), women/people simply  
>make the "option for silence", that is in some context or issues,  
>people simply estimate that they cannot/don't want to  
>communicate.

>

>Electronic communication is just a tool, but we have to take in  
consideration everythings that are behind/around.

I wasn't sure if you were referring here to women choosing the  
option for silence because they don't feel SAFE, private, secure,  
able to speak freely without fear of negative repercussions?

Definitely an issue that's important for this group to discuss!

maureen

You should also watch for problem postings:

- copyrighted material: it shouldn't be posted without permission from the author
- garbled postings: anything that looks to be in machine language or is completely indecipherable (e.g., file attachments) should be acknowledged as such be sure to contact the person who posted it to let them know what the problem was and help them to re-post it
- brewing or outright conflict (see Online Mediation in Chapter 5)

Of course, you're not just the facilitator you're also a participant in the workspace so take the time you need to add your comments, share information you've come across, and start new threads of discussion.

#### • Weekly

If it's not happening naturally from within the group — and it may not for the first several weeks, ensure that there is at least one new posting a week, to keep people coming back to the space.

#### • Periodically

The timing of these tasks depends on the volume of activity in your workspace. If you're in a very active space, you may need to attend to these tasks every month or

Chapter 4

**FACILITATING  
YOUR  
GROUP**

**Sometimes  
people just  
disappear  
out of the  
space, and  
you should  
find out why.**

so, or even more frequently. After a while your space will develop a rhythm that you adapt to.

**Look for Lost People**

Sometimes people just disappear out of the space, and you should find out why. Maybe their computer conked out, or they've been ill, or on vacation. Or it may be that the group work hasn't engaged them, or perhaps they don't feel comfortable there anymore. Whatever the reason, you should investigate to see if there's anything you or the group can do. If you find out that they will be offline for a while for some reason, post a note to the group because they'll probably have been wondering too.

Hi Pat, I'm the networking facilitator for the Ontario women's health networking project...

I see you posted some messages in the conference a while back, but we haven't heard from you lately...

Are you having any problems connecting to the discussion? We've also made it available as a mailing list so if using it in the conference form through Netscape is difficult, let me know and I'll send you info on subscribing to the mailing list.

The discussion should be getting livelier soon as I've just finished a round of contacting participants across the province, helping them sort out their access problems.

Let me know if there's anything I can help you with.

Hope to see you back with us again soon!

Maureen James  
WomensWeb/Technical Support

**Update Your "info" File**

As your group evolves ways of working together and defining your space, you should check to see that the "purpose of this space" posting (in a conference) and/or your "info" file (for a mailing list) reflect this evolution. You can repost the "purpose" document and replace the "info" file as often as you want. Even if there is no need to change it, you should consider circulating it from time to time to remind everyone of your accepted ways of collaborating.

Chapter 4

**FACILITATING  
YOUR  
GROUP**

**Summaries**

These are postings that take stock of discussion that's taken place over a certain period of time and show where it's at. For example, if you're working to produce a joint document, you'll have a range of topics in progress with variations on the

**Be on the lookout for information and resources to share with your group online.**

document text as it develops. To summarize it you can pull together what's been done so far into one piece, identify what still needs to be done, who is responsible for which pieces, and post that as a new topic. You can do this for any type of activity. Even if you're in a less active space, having regular "summary" postings helps get people back on track and reminds them what the online workspace is intended for.

### **Encouragement**

If activity in your conference seems to have died down a bit, you'll need to figure out why. It could be a seasonal thing, or extra-heavy workloads, or it could be that you've just completed a particular phase of work and people are catching their breath. Or it could be time to kickstart the discussion with more active facilitation: posting information, asking questions, clarifying the work you're there to do together, etc. (see Interpreting the Silence in Chapter 5).

### **• Ongoing**

There are some things you'll need to do on an ongoing basis:

- be available to be contacted by Web Networks staff
- add or remove users on the access list, if your workspace is private
- be on the lookout in your other electronic travels for information and resources to share with the group
- be a bridge between your online workspace and other offline places your group works together.



## **Top 10 Questions Facilitators Ask...**

### **1a. How do I delete my own postings?**

Unfortunately, you can't remove something once it's been posted. Our best advice is that you try not to post things until you're happy with them. Every once in a while we post something we wish we hadn't, for whatever reason. The best thing to do is quickly post a follow-up message letting people know of the mistaken posting (and to apologize if you think you might have offended anyone).

### **1b. How do I delete someone else's postings?**

This is also impossible. In the rare event that you are running a moderated mailing list, if you are the listowner, you can return someone's posting to them with an explanation as to why you're not sharing it with the group.

### **2. How long does the information stay in our workspace?**

If you're using an unarchived mailing list, your postings only stay around as long as any one person subscribed to the list wishes to keep them on hand. If your list is archived, or if you're using a conference, your postings should be available to you

Chapter 4

**FACILITATING  
YOUR  
GROUP**

**People  
without Web  
Networks  
subscriptions  
can buy  
conference  
access for a  
small  
monthly  
charge.**

indefinitely. Check with your service provider to see if there are any storage limits or charges.

**3. What's the maximum number of people that can have access to our workspace?**

It really depends on how productive you want your workspace to be. If your workspace is public, you can make it available to anyone with an Internet account if you want. There is no limit on the number of people who can have access to a private workspace, either. As many people as are needed to get the work done is the number of people who should have access.

**4. Some people in my group don't have Web accounts, how can I let them into our conference?**

People without Web Networks subscriptions can buy conference access for a small monthly charge. Each subscriber also gets access to the myriad other social changes resources that Web Networks offers. (See Appendix C for more information on Web Networks services). Alternatively, you can link your conference to a mailing list, and then anyone with an Internet account can subscribe to it.

**5. How will we know when we need to start a new workspace?**

There are many times when your group might want to set up a separate workspace: to hold meetings, to have a smaller group work together on a particular issue, to separate out different types of discussions, etc. Usually you'll find that people will let you know when the workspace they have isn't meeting all of their needs.

**6. How can I be sure that my workspace is private?**

If your group is using a mailing list, you can send a message to the listserver asking for the list of subscribers. We have suggested that you set up your list so that each person wanting access has to first be approved by the listowner. This way you'll see who each potential subscriber is before they get access to your space, and you can decide whether or not to give them access. Also, make sure you change the list password once it is set up by the service provider, and keep the password secret.

For a private conference, access is controlled by those with technical facilitator permissions (as outlined in Appendix A: Managing Access to Your Conference). Each participant must be added to the list of IDs with permission to use the space. Web Networks technical staff are also able to get access to the conference, for problem-solving purposes only.

**7. How can I tell if people have read my posting?**

If you sent it by e-mail, check to see that it was indeed sent. Mail programs often have a feature that reports on the status of outgoing messages: "queued" or "sent," for example. As long as the posting didn't bounce back to you with an error message, then it should have reached the group.

Chapter 4

**FACILITATING  
YOUR  
GROUP**

It's usually easy to confirm that a message is posted, and harder to determine if people have read it. Was your message worded in such a way that people were encouraged to respond upon reading it? If so, it may take a while, but some will. If there are no responses at all after a day or two, you can post a query to the group asking for confirmation that the message was received and read, and requesting the specific type of feedback you're looking for.

#### 8. I'm going to be away from my computer for some time. How do I take care of my workspace?

Well in advance of going away, you should find someone to take on some or all of your facilitation role. See the Co-Facilitation section in this chapter for details. Be sure to let the group know how your absence is being covered.

#### 9. What should I do if I see something weird in my workspace?

The easiest thing to do is describe the weird thing to the support people where your workspace originates. For example, if you're using a conference you could contact Web Networks User Support. If you're running a mailing list at your local ISP, you would contact the technical support people. You can send a copy of the weird thing to the support people to look at, by e-mail. There are many types of things that might look weird if you've never seen them before:

- when someone posts a formatted or garbled document, it may just look like gibberish
- the same posting may appear repeatedly due to a problem with someone's mail program or the mailing list software
- you may have inadvertently let a trouble-maker into your space without realizing it
- if you're using a graphical newsreader like Netscape or Internet Explorer to read your conference, you may have changed the settings that control how the information is displayed.

Before panicking, see if anyone else is seeing the same weird thing you are, so you'll know if the problem is just with your computer, or something more general. If others are experiencing the same thing, contact the appropriate support people.

#### 10. Some of the people in my group can't connect to our workspace. Why not?

There are many possible reasons for this:

- Have they subscribed and been approved to use the mailing list?
- Are they included in the list of people that have access to your private workspace?
- They may need to enter a password to get into the workspace. Passwords are case-sensitive, so check that they have they turned off the Caps Lock key.
- Have they typed in the conference name correctly?

**It's usually  
easy to  
confirm that  
a message is  
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harder to  
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people have  
read it.**

If they are using Netscape or Internet Explorer:

- Is the browser screen fully expanded?
- Have they got their browser set to show all articles/newsgroups instead of just unread ones? Graphical newsreaders are usually set by default to show only the new postings since the last time you checked the discussion. If you have subscribed to a number of conferences but they do not appear on your visit list then that means there are no new postings in them. The conference has not disappeared! Check the drop-down menu items and look for an option to show all subscribed newsgroups (or something similar).



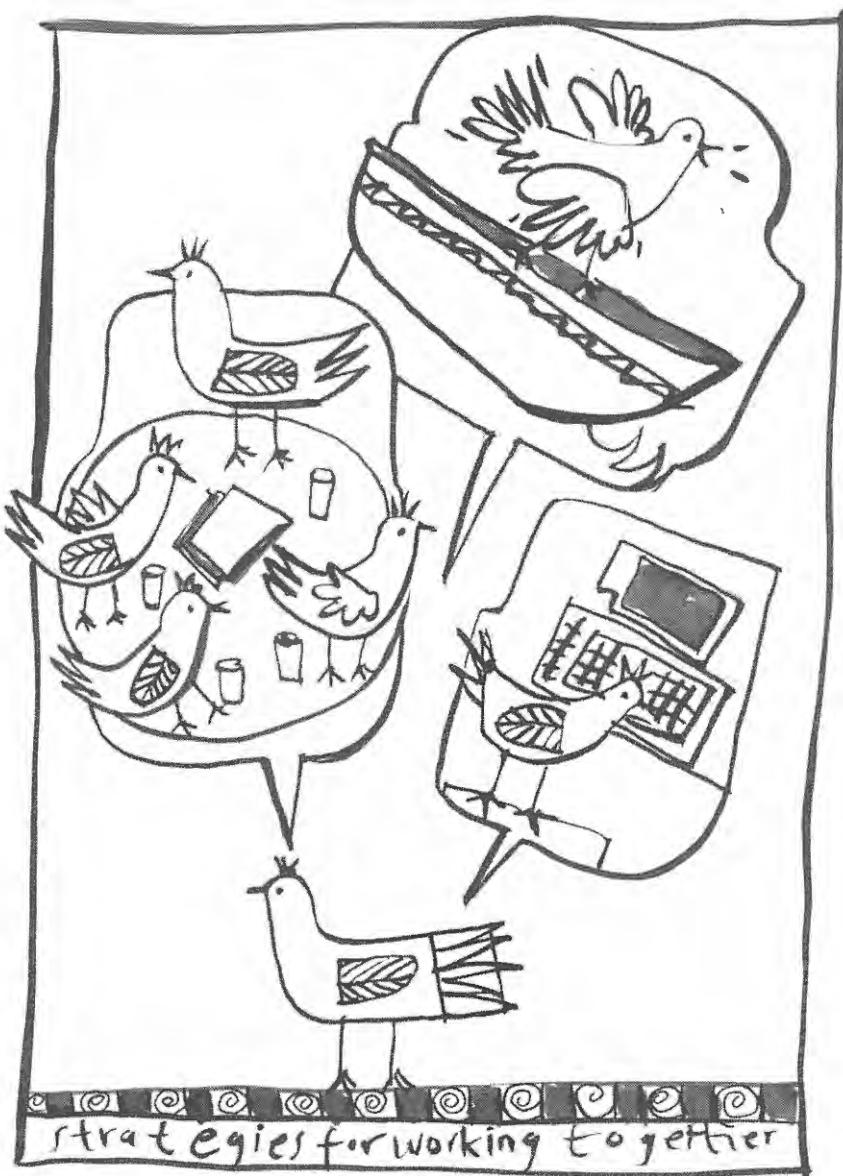
As a new facilitator, getting familiar with your territory, your group and their dynamics, and the tools requires a lot of patience and determination. Over time, what may have at first seemed daunting, will start to become second nature. When all else fails experienced facilitators return to their roots: you can always call on your group for help and assistance and draw on your previous experiences to guide you. In most cases this will work. If it doesn't, chalk it up as a learning experience and move on. You will find yourself continually learning new things: about online venues, the software tools and most importantly, about how people in your group communicate, listen and work together. Chapter 5 focuses on this latter topic: strategies for getting your group working together online.



Chapter 4

## FACILITATING YOUR GROUP

# Strategies for Working Together



Chapter 5



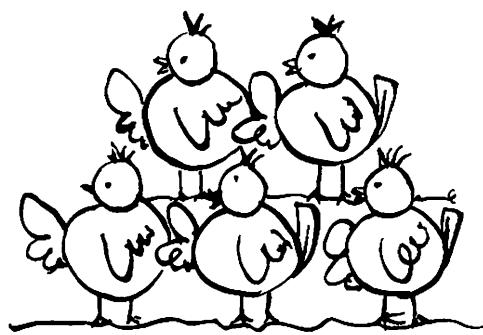
# Strategies for Working Together

Chapter 4 prepared you for your role as facilitator. In Chapter 5, we shift the focus away from you and towards the group, to outline strategies for creating and maintaining a welcoming and productive workspace.

In this section, we present tools, suggestions and lots of examples for:

- listening to each other
- creating a safe environment
- establishing ground rules for cooperation
- renovating your workspace
- keeping your workspace alive
- conflict mediation

We also offer some tried and true practical tips and guidelines for working together in a text-only, faceless environment.



Chapter 5

**STRATEGIES  
FOR WORKING  
TOGETHER**

**To do the job of synthesizing, bringing the group's efforts together toward a specific goal, and moving the group forward, a facilitator must be acutely aware of each participant.**

## Strategies for Working Together

In this section we have collected the strategies we draw on regularly to keep our online spaces working well. Each group will find unique ways to work together effectively online. How you assist a person to interpret the silence after they post a message or help them to communicate more clearly, for example, will depend on your individual style and approach. We have included a section on basic message posting guidelines at the end of this chapter which you can customize for your group, or use as the need arises to keep your online workspace active and vital.

### Dialogue and Listening

At the end of a long or intense face-to-face facilitation session the facilitator is usually very tired. Why? It's not because they were talking the whole time. A facilitator's tiredness comes from the intense listening they have been doing. To do the job of synthesizing, bringing the group's efforts together toward a specific goal, and moving the group forward, a facilitator must be acutely aware of each participant, whether they are contributing and what they are contributing. This job is equally important in your online workspace, and you will find it challenging in new and different ways because of the non-visual and asynchronous nature of the space.

In one highly active mailing list where participants were noting that the space wasn't functioning very well, the facilitator intervened and raised the possibility that the participants were not listening to each other: each was so busy making their own individual points that they weren't "hearing" or building on what had already been said to try to reach points of cooperation or consensus. For some people, electronic messaging is a very new form of communication, and they haven't yet learned of its capacity to accommodate dialogue. A critical component of dialogue is listening. As facilitator, it is important for you to focus people in the online workspace when they appear not to be listening to one another.

### Creating a Safe Environment

Particularly at the beginning, you must pay attention to your group's need for participating in a space that feels safe. A person's sense of online safety comes from knowing how the space is supposed to work, what is expected of them as a member of that workspace, and how they should treat others. Your job as facilitator is to make sure that your group is well prepared to work together respectfully. You can do this by working with your group to evolve the ground rules for sharing the workspace (see next section) and by intervening if people aren't cooperating.

Many people learn by "lurking" in online group workspaces, which means they are reading the messages but not posting. Lurking is a good way to become familiar with the group and how it works. For those lurking it can be intimidating to watch participants treat each other disrespectfully. Hasty responses are often at the root of this behaviour, and people tend to make assumptions about the intent of other people's postings. You should bring everyone's attention to this situation if it arises.

You will probably hear who identify strongly with a fear of posting. The more you can do to set a tone online which is safe and respectful, the more comfortable people feel to join in. Here's an example:

```
/* Written 5:59 PM Apr 19, 1996 by lrykert in web:act.cuts.ont */
/* ——"Facilitators Note" —— */
```

Just thought I would take a minute to reflect back some of the feedback I have had from folks and my own observations over the last few weeks.

From time to time there has been disagreement among the people who post in act.cuts.ont. Since we started we have agreed to encourage debate and dialogue to further our understanding of the issues, to learn, to build analysis. I think we have done a pretty good job of that - of course there are always exceptions. Recently over the discussion of one organization's work I have noticed personal attacks and references to rape which I personally found very strong and, in the case of the rape analogy I was offended. I would like to make some suggestions and hope these will be received in the spirit in which they are intended which is to keep us focused on our common cause of taking action against the government and building solidarity among groups who have previously not worked together.

Finally I know there are many people who regularly lurk in this conference which I support because I think this is their way of learning about this venue. However I have been told many times people are intimidated by the use of strong language and feel intimidated to post fearing personal attack.

Therefore I respectfully suggest we:

- keep up the dialogues and debates, moving to e-mail when things go on and on, especially between a few
- demonstrate respect in postings even when disagreeing
- take some time before posting...I have fired off an angry response and later regretted it and know I can benefit from thinking for a little while before posting
- in postings try to be clear about the kind of response you are looking for
- when cross posting (bringing info from somewhere else) please place the posting in context (has it been part of an ongoing debate for instance, if so what is the summary of the discussion so far?)
- encourage others you know are lurking to post as they feel comfortable

Our work is building and we need to remember some days the anger and frustration we feel may spill over in ways we don't intend. I speak for myself here.

Please post responses or reactions to these suggestions either in e-mail or to the conference. I am very open to any and all ways of keeping us moving forward.

In solidarity...Liz Rykert co-facilitator <lrykert@web.net>

Chapter 5

**STRATEGIES  
FOR WORKING  
TOGETHER**

**A participant feels safe if they know that they can post their messages without fear of reprisal.**

A participant feels safe if they know that they can post their messages without fear of reprisal, and that they have someone to turn to with problems or concerns. You may not be able to prevent one participant from posting in anger or in haste to another. But if people know it is someone's job to mediate and to promote a respectful environment in the online workspace, they will feel safe.

Handling these situations carefully is something that you will learn how to do over time. You should pay attention to the tone of your group's messages. If you detect anger or attack online, always start by responding privately in e-mail unless things have escalated to a point where you are concerned for the group as a whole. In some cases you may feel the heat of the flame yourself. Most importantly, move slowly. Keep your messages short and to the point, and respond with a cool tone. Try not to get into lengthy or defensive responses. These situations are rare and are much more likely to happen in large public spaces than in smaller private or semi-private spaces.

## **Developing Ground Rules for Your Workspace**

Each conference or mailing list will, over time, begin to take on a personality of its own based on the people who are working together in it. To begin, we recommend you develop some basic guidelines for how your group will cooperate in the space. Your group will evolve and grow together and eventually develop its own set of norms that govern how you relate to each other. This is how you will hold each other accountable for fulfilling roles and responsibilities.

\*\*\*\*\*  
Working Guidelines for Posting to Click4hp  
\*\*\*\*\*

1. General Suggestions for Posting:

\*Give Your Posting a Clear Title\*

When you write or reply, check the subject line to ensure it reflects the content of the message. Edit if necessary.

\*Edit your Replies\*

When replying to a posting, quote only text required to put your reply in context. Cut-and-paste quotes into new messages. Edit out needless lines in replies and forwarded material.

IMPORTANT! Remove headers from messages in the body of the posting. Failing to delete TO: lines in the body of messages can mean that your message is not posted. Mailing list software may reject such headers as a precaution against mail loops (e-mail cycling between two lists).

When you hit REPLY be sure to check the TO: line. You may not want your private message read by the whole list and should not repost private e-mail to the list without permission.

**\*Keeping Postings Readable\***

Keep messages short -two or three screens of information-and 'point' to sources of further information (yourself, web pages, etc.). Use 'white space' in your message to **\*Avoid Word-Wrap\***

When using wordprocessor software, compose with a non-proportional (fixed) 10 pitch font. Postings use a fixed font with about 72 characters to the line. Proportional fonts crowd more characters on a standard line and cause word-wrap (full lines followed by line fragments) when posted.

When in doubt check attachments in a DOS/ASCII editor or first e-mail them to yourself, as a test.

**\*Identify Yourself\***

Sign your messages at the end with your name and e-mail address. Some e-mail software fails to capture the sender's name from the header, making it impossible to follow up, off the list, by e-mail.

**2. Postings Re: Products and Services on CLICK4HP**

Click4hp is about the uses of the internet in health promotion. Postings are welcome which mention services and resources relevant to using the internet to further health promotion. So are postings about events, publications, etc. which are mainly academic and/or non-commercial in nature.

Postings for commercial health products or services are discouraged. When in doubt, forward your posting to one of the list facilitators for advice. In all cases, keep postings short and point to sources of additional information. Try not to post price lists, order forms, etc. except in the case of non-commercial publications and events.

**3. One final thought:**

As we make the transition to online health promotion work new participants will join and need opportunities to learn and become oriented in the online workspace. Click4hp's online facilitators are here to provide assistance and orientation, and to animate discussion and debate. When in doubt you can always contact one of us for advice, or with suggestions.

Liz Rykert <lrykert@web.net>,  
Alison Stirling <alison@opc.on.ca>  
Sam Lanfranco <lanfran@yorku.ca> improve readability.

Chapter 5

**STRATEGIES FOR  
WORKING  
TOGETHER**

**A group usually experiences a heightened sense of excitement when first getting together online, which keeps things perking away at the beginning.**

A private venue can be quite different from a public or semi-public workspace. As the facilitator, it isn't necessarily your responsibility to set the tone in the workspace but rather to keenly watch for indications of people's preferences for how they want to work together. Your role is to draw out these subtle gestures and translate them into guidelines and ground rules by which the group will work. At some point, your group may reach a road block or disagreement which leads the group to figure out a new way of working to ensure that a problem does not happen again. Your job is to assist the group to come to agreement on new guidelines or values and then to maintain these for the group. Moving your group through the discussion and the agreement needed to establish a new guideline will give everyone the opportunity to give input and to develop a sense of ownership for the results.

Here's an example:

Colleagues,

A number of recent postings have advertised products or services. This list is about the uses of this electronic venue for health promotion and we (the facilitators) are preparing a set of 'acceptable practice' guidelines for the list.

If you have ideas and suggestions in this area please communicate directly with one of the facilitators by e-mail:  
<lrykert@web.net>, <alison@opc.on.ca>, <lanfran@yorku.ca>.

We will prepare and post the draft guidelines -for comment- and then repost acceptable practice guidelines after a round of discussion.

We want to do this quickly so send in your suggestions to one of the three of us soon.

Yours sincerely,  
Liz Rykert  
<lrykert@web.net>

Be sure that the guidelines in your mailing list "info" file are up to date. In a conference you can periodically post a note directing new members to read the guidelines and ask any questions they may have. We have included a list of sample guidelines at the end of this section which you can use to get started or draw from, as your group evolves its own set of norms about how you want to work together.

Regularly reflecting back the guidelines either as helpful tips or when responding to the group's questions is a good way to ensure people feel safe in the online workspace and know how to behave.

Chapter 5

## **STRATEGIES FOR WORKING TOGETHER**

## Growing Your Online Workspace

In some cases, before actually going online, groups new to online collaboration establish a suite of workspaces intended to meet the anticipated needs of the group: one conference for program discussions, another for policy, another for volunteer support, and one for announcements, for example. Starting new users off with a maze of workspaces to negotiate and navigate can inhibit effective use of the online environment. Evolving the spaces as you need them means they are relevant to your group's needs and will serve the purpose for which they are intended. We recommend you start out with one space and add new ones as needed. It is quick and easy to add new areas when it's time.

How will you and your group know when you need to add a new space? You will notice people are complaining about too many postings which seem off topic and yet important to some members of your group. Or, you may realize you have management issues to which only some group members need access. Or, within your group there may be distinct geographic concerns and it would be useful to cluster people from the same region in a common workspace. Sometimes, groups want a space that acts as a library for their documents, separate from any discussion or debate. In all cases, adding a new group workspace online can be accomplished quickly.

Some of your spaces may be active longer than others, depending on their purpose. A workspace for planning an event will have a fixed time horizon, for example. It's good to keep dormant spaces around (if it isn't costing you a lot of money), as they provide a useful archive of your group's work, and a reference point for newcomers. Before getting rid of them altogether, you can mine your old workspaces for useful tidbits and post them in your active spaces for reference.

When your group is using more than one workspace, make sure to establish mechanisms for sharing information between them, so people can keep tabs on what's going on without having to actively participate. Someone in each space can take responsibility for posting periodic summaries to the other spaces, for example.

When adding a new space, state its purpose in a way that will work with the existing motivation of people to join the new space. For example, a list for a group discussing issues of local democracy in Toronto started as a place to make announcements but quickly became a place where people were debating the issues. The volume of messages grew exponentially. A new "forum" list was started to accommodate the discussion. In retrospect, it would have been more strategic to keep the discussion in the original list and move the announcements to the new list. Why? Because people continued to post discussion to the announcements list while also discussing issues on the new list. It would have been easier to "move" those who wished only announcements to the new list because they were more highly motivated to limit the discussion. Instead of trying to stop behaviour on one list, it would have been more strategic to create the new list with guidelines which met the needs of the announcement-only group.

**Get your group participating by posting new topics and including suggestions about how they can respond.**

Chapter 5

**STRATEGIES  
FOR WORKING  
TOGETHER**

Learning to make each online group space meet your needs, and adding spaces as you need them will lead you to a completely customized group of interconnected workspaces.

## Maintaining an Active Venue

Many people report that online group spaces often start with a bang and slow down over time. As facilitator, you should be conscious of this from the very beginning. Slowdown of activity in your workspace can be caused by many things, most of which we have already prepared you to avoid by emphasizing the importance of carefully planning your move to working online. Some slowdown is inevitable, however. When it happens, don't despair. Each group tends to establish its own pace of working together online. A group usually experiences a heightened sense of excitement when first getting together online, which keeps things perking away at the beginning. Here we offer some ways you and your group can keep things moving along after the honeymoon is over...

### Sharing Information and Resources

You can encourage all participants to act as pipelines to outside information sources. Your online workspace is the one place everyone in your group has access to, but each member also brings their own individual interests and knowledge. Encouraging each member to post relevant resources they find online or offline will create a steady stream of new things for people to use in their work together. Each person can take a different issue lead. For example, in a child health project one person might regularly update on child development information, while someone else might take responsibility for program evaluation information. This leads to coordinated resource sharing and helps to minimize an individual's sense of being overwhelmed by all information "out there." The workspace becomes the place people can rely on to keep up to date without having to be individually responsible for collecting all the information.

## Drawing People In

Get your group participating by posting new topics and including suggestions about how they can respond. One way is to give people a deadline to post by:

Date: Fri, 30 May 1996 19:27:57 -0400 (EDT)

From: lrykert@web.net (Liz Rykert)

To: lrykert@web.net

Subject: Group Retreat Prep

/\* Written 3:52 PM Apr 24, 1996 by lrykert@web.apc.org in  
web:citygroup.staff\*/

/\* —— "Group Retreat Prep" —— \*/

The Planning Group met Tuesday Afternoon. Here are the ideas we came up with:

- building trust in current environment of change and renewal
- how do we continue to sustain the history of trust in our partnership
- setting priorities for us as a whole group for making decisions about change to the program given the reduced funding
- thinking about how to incorporate ongoing change and building adaptability and flexibility into our programs so our efforts will continue to grow in the face of change/funding reductions

General:

Interest in using the high ropes this year - this would not mean all would have to go on the ropes !!

Build in lots of FUN!

Please post responses, agreements, questions or concerns prior to April 30th so we can finalize at the meeting Thanks...Liz

**A good facilitator will summarize and synthesize what people are saying to keep the discussion moving and maintain a focus.**

Chapter 5

**STRATEGIES  
FOR WORKING  
TOGETHER**

Another way is to end the posting with a question and exact instructions for how to respond:

```
/* Written 12:02 PM Dec 14, 1995 by lrykert@web.UUCP in
web:youth.futures */

/* —— "On-Going Support For On-line Work" —— */
I am taking the liberty of summarizing the requests for support to
date:
How do I use all this equipment to my best advantage?
How do I arrange for additional training?
How can we use the conference space as a training ground too?
Learning the meaning of different on-line methods of work...FTP, World
Wide Web, Fax Gateways, Searchable Data Bases etc...

I think there is lots of room for figuring this stuff out.
First of all please post back to this topic as a reply with other
ideas and suggestions. When you finish reading the topic at conf
prompt type (w) for write, choose (r)eply, (c) for conference and then
hit enter ...Now you can start typing. Remember in the conference
space you need to use a hard return at the end of each line and when
you are done you hit enter one final time, use a period on the last
line as the only thing on the line and then enter to send the message.

I will undertake to post tips regularly and if others see a question
and you know the answer please jump in!
```

Liz Rykert

Make sure to take into account the many different ways your group might be accessing your workspace when you give instructions on how to reply.

Using e-mail to reinforce the use of the shared workspace can also be helpful. Watch to see who is responding to messages and who is not. Supporting those who are by sending a quick e-mail message with a comment about their contribution can be very encouraging. You can also send e-mail to those who are not posting to ask them if they are having problems or are reluctant to post for some other reason.

### **Developing New Threads**

Just like you used seed topics to get things going in your workspace, you can also use them to maintain interest. Use your creativity to post interesting or relevant items. Some facilitators make a habit of posting humour regularly. Other groups encourage people to share more than just their work online, as in a real-life workplace where we often discuss current events or the great movie we saw last night. Together your group will develop norms about what is okay and what is not okay to post. Keeping variety and quality postings high will go a long way toward maintaining the content stream and the group's enthusiasm.

Chapter 5

## **STRATEGIES FOR WORKING TOGETHER**

Topic 49 Article, Reviews, Ideas... 13 responses  
lrykert youth.futures 12:49 PM Aug 29, 1995

I thought it might be good to start a topic on the conference for people to share materials, articles or helpful resources for their work. When posting material on-line it is important to reference the source of the material and where readers may be able to access copies of the original document. Liz Rykert, <lrykert>

### **Summarizing and Synthesizing Postings**

A good facilitator will do in the online workspace what they do in a meeting or workshop: summarize and synthesize what people are saying to keep the discussion moving and maintain a focus. Doing this online can help to maintain participation by continually capturing discussion to date, and then posting prompting questions to take the discussion to the next stage.

Particularly for mailing lists, an excellent way to engage newcomers as well as re-invigorate veteran subscribers is to produce regular summaries. These outline what has transpired on the list over a period of time: decisions made, questions raised that still need answering, issues covered, check-in on task delegation, etc. They can also contain reminder information for everyone: how to access older postings, what the list is for, etc.

Chapter 5

**STRATEGIES  
FOR WORKING  
TOGETHER**

Here's a sample summary posting:

Topic 26 SUMMARY: 04.30.97 - 05.15.97 2 responses  
maureen gk97.gender 9:46 AM May 17,  
1997

GK97-GENDER Summary  
04.30.97 - 05.15.97

Practical considerations facing women and women's organizations around the world, in our use and adoption of information and communications technologies is the focus of the gk97-gender discussion launched by the Association for Progressive Communications (APC) on April 30th. It's a place for those who are not attending the Global Knowledge '97 conference in Toronto, as well as those who are, to speak, strategize and intervene on Gender and Information Technology issues at the GK97 meeting.

Initial discussions have been concerned with the first Focus Piece: Gender Considerations in IT Programme and Policy Development.

The questions open for input are:

- o What are the IT policy and programme issues you think need addressing?
- o What are some strategies you think will yield meaningful results for women?

Suggestions so far have included:

- learning from the past application of technology
- ensuring that the application conforms to the beneficiaries' concepts of development
- gender sensitization programs for policy makers
- workshops on methods to assess whether the benefits/costs of an initiative are: 1) biased against/for women, and 2) applicable to the development of women
- using IT to improve gender monitoring of organisations, e.g., the current online attention being given to the extreme under-representation of women at the GK97 event
- developing 'buddy systems' where women's grass root organisations are provided with access to technology by the more adequately resourced development and governmental agencies
- using the GK97 process to directly address the gender requirements of global knowledge
- asking CIDA and the World Bank to present their progress in addressing the gender constraints of women's access to technology, and identify obstacles and prospects

Participants from around the world have also been sharing their personal experiences in either using IT, or being involved in IT projects for women. We've heard about:

- a community women's networking access initiative in Tver (Russia), operating out of a university professor's home, where one

Chapter 5

**STRATEGIES  
FOR WORKING  
TOGETHER**

**Drawing  
out the  
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from  
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mail account is shared among 30 women, and where women act as information bridges to those not online by making presentations of online findings; plans are to expand into library-based access with more computers, if fundraising is successful

- Network of East-West Women (NEWW Online), a communication and resource network for women's organizations in the former Soviet Union (FSU) and Central and Eastern Europe (CEE) has implemented a small but effective train the trainer program and regional networking strategy

- situation in Eastern Europe, a region in political, economic, technological, and social transition from strict information and communication control to one where women, if enabled to use them, can harness the democratizing possibilities of using IT

- personal experiences in IT-related environments: training courses, work, etc

Participants have also been asking questions, including:

- where can we find effective tools to carry out gender analysis of programs, projects and policy?
- are there places in the world where these tools are respected and used effectively?
- request for more women's networking success stories
- information on funding availability for one-on-one women's training programmes

Next Focus Topic... Starting May 18th:

Making Computer Networking a Women's Priority

- How do we address the economic and social barriers women face in adopting information and communication technologies?
- What are the reasons that women should want access to this technology?
- What can we do to make it something women should want access to and to fight for?

Maureen James  
APC GK97 Facilitator

\*

For more information, see the introductory documents, summaries and reference materials for this discussion in English, Spanish and French at:

<http://community.web.net/gk97/resource.htm>

If you are without WWW access, you can access these documents by sending a message with no subject to: [getweb@ecn.apc.org](mailto:getweb@ecn.apc.org) with the following text: get <http://community.web.net/gk97/resource.htm>

To participate in the discussion, send a message to:

[majordomo@igc.apc.org](mailto:majordomo@igc.apc.org) Do not enter a subject. In the body of the message, type ONLY the text: subscribe gk97-gender

We also offer a digest (once-daily) version of the list: subscribe gk97-gender-digest

Chapter 5

**STRATEGIES  
FOR WORKING  
TOGETHER**

**One of the first things people report when they begin posting in a group workspace is the frustration they feel when no one responds to their messages.**

You can circulate parts or all of your summaries to other online venues, to keep them up to date on what you're doing, especially if your group has a number of workspaces with different groupings of participants.

Online summarizing is a skill which may take some extra effort on your part. People like to be credited for their contributions. When summarizing, it is a good idea to quote people's contributions building toward a summary point and then pose a question or make a provoking statement to elicit a response.

### **Reading Between The Lines**

It may take some time to develop a sense of who the different people in your workspace are and how comfortable they feel, especially if you do not have the opportunity to meet face-to-face. Drawing out the human tone and feelings from online text can be tricky. Never make assumptions about what you are reading. Learning to move slowly in what feels like a very fast medium and exercising good judgment about when to intervene are two aspects of being an effective facilitator. Looking into the posting and reading the tone can be difficult. Always check in with the original author if you are unsure. If you think others are also having a hard time reading the tone of a posting you can ask for clarification publicly in your workspace. Or, you can use e-mail to ask these questions and have the author themselves move in to make the clarification to ensure there are no misinterpretations.

Here is an example of how to respond if the tone of a message begins to reflect aspects of disrespect or anger:

Hi there:

I have been contacted by a number of people recently who have expressed concern over the tone of recent postings. They have indicated they are uncomfortable posting because they are worried they will be attacked. From the beginning, and as a condition of participation we have agreed to \*always\* post with respect even in the heat of the moment. Please take some time to reflect before you post. Reread your message before you send it.

You can use phrases like In my humble opinion (IMHO) or "I respectfully disagree..." before you make your point.

This is an open and busy list. Keeping it respectful will support everyone who wants to join in.

Regards (and respectfully ;-)

Liz

Chapter 5

**STRATEGIES  
FOR WORKING  
TOGETHER**

### **Assisting Those Who Are Not Good Online Communicators**

We all have different styles of communicating. Learning to communicate in text-only can be challenging for some people. As facilitator, you often need to interpret people's communication to assist them to be clear and effective online. You will

**As new people join a workspace that has been running for some time, your role as the facilitator is like the role of host at a gathering.**

experience a wide variety of communicators in any online space. Some people communicate in text just as they talk, using punctuation and “smileys” to show emotion or expression of feelings. Others come across very formally or even somewhat rigid online. The majority fall somewhere in between. Effective online communication is usually short and to the point, relevant to the topic underway, builds on the information already available, and is respectful in its language and tone. It should also tell people what kind of feedback is needed, if a response is expected. (See the Posting Guidelines section at the end of this chapter for more tips.)

To assist those who are poor online communicators you can model in your own postings how your group should post topics and responses. Encourage individuals to exchange e-mail with you as a way to develop confidence in posting. Many people are more comfortable using e-mail than posting in a group space, especially if they are new to online collaboration. Another strategy is to have the person post to you first for review: you can point out the parts of the posting that others might find difficult and ask them to rewrite the message. Having an open and trusting relationship with your group members will assist you in doing this. In large public spaces often the group itself will give pointers to poor communicators.

Here's a sample supportive message:

Hi Sue:

I noticed your recent posting was very short. I had a hard time understanding your point. I think you mean you hope people will agree to forward information about the event on to others who are not online but this was not clear. You might want to send another message to the list explaining what you meant. Posting succinctly is a good practice but if the message is too short then people may not get the meaning.

Let me know if I can be of assistance... Regards, Liz

### **Interpreting the Silence**

One of the first things people report when they begin posting in a group workspace is the frustration they feel when no one responds to their messages. You'll find that people respond to things when they feel they have something substantive to say. Often if someone agrees with the gist of a posting, they don't respond because they feel a posting containing “Yup, I agree” is a waste of everyone's time. Instead, they'll wait till they have new insight or information to offer. Or, it may be that people are not responding because they are unsure of what the message means and don't want to look silly asking a clarifying question.

One reason that silence occurs is that the person posting the message hasn't been clear about what kind of response they are looking for. If it's a draft document for example, then the poster should identify what they want people to focus on, and

Chapter 5

**STRATEGIES  
FOR WORKING  
TOGETHER**

**Disagreement  
among  
members is  
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some point in  
your work  
together.**

when the deadline for feedback is. For new users, as facilitator you can fill the silence with your own interpretations of why you think people are not responding or with seed postings to keep things rolling along:

Hi ALL!

I had a call today from Ann. She was feeling rejected because no one had responded to her posting yesterday. I explained sometimes it is because people have not read it yet or they might not have anything to add. To begin, even if you just agree with her jump in and make a few comments. Sometimes the silence can feel deafening even for me ;-)

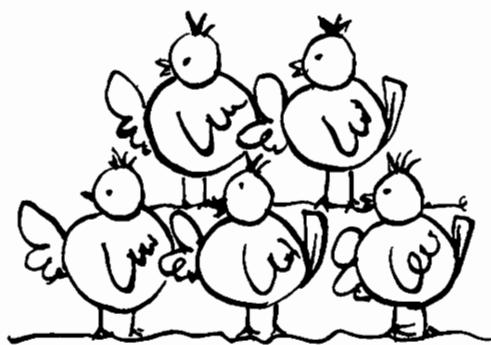
Just remember there are lots of reasons why people are silent so don't assume it is you!

Cheers, Liz

Starting a posting about the silence can be a good way to get people talking. Some groups decide to name what the silence means. For example, if everyone remains silent on a suggestion then it means it is generally accepted. You can establish a practice like this with your group.

**Including New People**

As with any group of people some will know each other better than others and some will feel more confident to jump right into the space than others. As new people join a workspace that has been running for some time your role as the facilitator is like the role of host at a gathering. Each new member should be encouraged to introduce themselves and relate their introduction to the focus of the work underway.



Chapter 5

**STRATEGIES  
FOR WORKING  
TOGETHER**

Here's a sample:

Greetings,

Welcome to new participants on this list. A recent review indicated a number of new subscribers and so I would like to take this opportunity as one of the co-facilitators of the list to invite you to sign on with a short intro of who you are and your interest in the list.

We are currently in a discussion of the relationship between literal and virtual workspaces. As this topic began we asked:

What are the key dynamics at play as we transform our work with the use of the virtual space?

How do we feel this in our day-to-day interactions?

What kind of changes have you noted?

How do the concepts of transparency, accountability, and collaboration play out in this/these relationship(s) between the virtual and the literal?

As we have begun to think about these questions we learned, and some were relieved ;-), that it is okay to hit that delete key, to lurk, to not respond (thanks Eugene!) The issues of how we manage information and the use of the internet specifically to enhance access to consumer health information have emerged as topics currently underway.

Whether you are new to the list or have been watching for a while we always welcome your contributions.

Regards,

Liz Rykert - co-facilitator

<lrykert@web.net>

**Online you will encounter people with as full a range of strengths, fears, opinions and knowledge as any group might reflect.**

Watch the postings from these new participants. They may need assistance with online etiquette or they may just feel like outsiders. Check in with them by e-mail to ensure they are feeling up to speed on what is happening, what is expected and how to post.

## Online Mediation

As a facilitator you will encounter all kinds of people with as full a range of strengths, fears, opinions and knowledge as any group of people might reflect. Being on your toes and ready to respond at any time with consistency and steadiness will go a long way toward making you effective in your role, and will provide the support your group needs to get things done together. We cannot begin to anticipate the range of problems or particular issues your group may encounter. However we do know

Chapter 5

**STRATEGIES FOR WORKING TOGETHER**

**For online group collaboration to work well, each person has to commit to a routine of checking in for new messages on a regular basis.**

there are some things you can expect. Disagreement among members is inevitable at some point in your work together. You need to be ready to manage online disagreements and enforce the ground rules developed for your group workspace from time to time.

When two or more people are disagreeing online many groups develop a guideline to move the resolution of this type of discussion to e-mail, with agreement to post the resolution to the group (if appropriate). This is a way of mediating without affecting the entire group, and it keeps personal differences out of the shared forum.

Here's a sample:

Hello there,

I am writing to the two of you in e-mail instead of the list because I have been watching your discussion carefully and would like to make a few suggestions:

You both have very important points to make about the future direction of our work. It seems to clear to me though that you are heading in different directions. There are ten other group members to consider in these discussions but I have noticed over the last week there was only one other posting on this topic.

What do you think this means?

Secondly,

I am not sure having this discussion in the group workspace will help to move you both closer to finding a solution. Perhaps it would help if you could agree to continue your dialogue in e-mail for awhile and then post back to the group, either together or separately, the decisions you come to. It may mean you still disagree but it will be good for the group to hear from you both about what attempts you have made to find some solutions.

Please post back to me in email either privately or with a cc: to each other and let me know how you would like to proceed.

From the beginning we have agreed to work in the group and online in a way which demonstrates respect and listening. I repeat this at this point because I can sense the frustration in the messages from both of you.

I look forward to your response,

Respectfully, Liz

Chapter 5

## **STRATEGIES FOR WORKING TOGETHER**

**In some cases, as facilitator you will be expected to directly deal with disputes in your workspace.**

Some people in public spaces seem to relish the opportunity to air their disputes or disagreements. You can use the power of the group itself to encourage group members to enforce their own ground rules. If you have done your job well in collecting and reflecting back the ground rules on a regular basis then group members will know what is expected of them and use them to ask the person(s) to change the way they are behaving.

As a facilitator it can be difficult to know just when to leap in and respond. This will become easier over time and with experience. Pay attention to what the pace of the group is. Try letting some things go by and see what happens. The group may eventually resolve the issue without your intervention. Reading the group consensus is important. Testing the silent voices — those who lurk, can be one way to see if what is being written is, in fact, reflective of what the larger group thinks. You can do this by inviting a private response by e-mail or by using a simple survey with everyone.

In some cases, as facilitator you will be expected to directly deal with disputes in your workspace. You will need to decide how to proceed. Use care and respect, modeling the same type of posting you hope to get in return from the parties involved. If you need to move to mediation then be clear about what you hope to accomplish and ask all parties to agree on this. Decide where you will resolve the conflict (e-mail, in the workspace, by phone or in person) and ensure you have collected both sides of the issue and shared these with all parties involved in the dispute. Keep a record of your attempts to resolve things and build on previous attempts.

Not every disagreement will be able to be resolved. If the disagreement is more likely a reflection of bigger problems within the group, no amount of your mediation will solve the problem. It's important for you to understand the scope of what you can do to resolve a conflict and when to call on others in the group who may also be in a position to step in.



## **Helping Your Group Collaborate**

As a facilitator, you need to help your group get comfortable in the online workspace. Here is a list of guidelines you can share with your group to create a collaborative and friendly environment, and to show them what to expect from each other when working online.

- **Introduce Yourself**

Tell people your name, what you do, what you're interested in... whatever you would tell them in a face-to-face situation.

- **Post Your Schedule**

When you're introducing yourself, or in a separate topic, you can also tell everyone about your schedule, so they'll know when they can count on you being available in the workspace. For example, if you travel a lot or are offline for extended periods, let

Chapter 5

**STRATEGIES  
FOR WORKING  
TOGETHER**

people know you're leaving and when you'll be back. Particularly if a time-sensitive activity is occurring, such as an online meeting, let people know if you aren't going to be able to participate fully so the group isn't left waiting on you.

#### Check Your Workspace Regularly

For online group collaboration to work well, each person has to commit to a routine of checking in for new messages on a regular basis. Once a day is usually enough. You'll find that regularly checking in takes much less time than letting things pile up. You can usually zip in and out in 5 minutes a day.

#### Respect the Other Participants

Your group will develop its own unique way of working together, and it will have to work through conflicts, growing pains and other unanticipated situations. Be sensitive to the "ground rules" your group evolves.

#### Help Out if You Can

If you're accustomed to working electronically and find that others are less so, offer assistance. Often new networkers are hesitant to ask for help. Many have a hard time distinguishing the source of a problem, and always assume it's something they've done wrong. Let them know problems can arise in many places: their computer, their local Internet service provider, Web Networks, even the phone company sometimes!

#### Ask For Help If You Need It

If you're new to online group work and feeling out of your depth, don't hesitate to ask for help. You can post questions right in the conference, or you can e-mail the facilitator. If it's a technical problem you're having, try contacting your ISP for assistance.



### Posting Guidelines

Here are some conventions and suggestions for posting messages that make it easier for everyone to work together online:

- **Be Brief**

Try to limit your postings to one or two screens in length.

- **Create single-subject messages whenever possible**

This makes it easier for people to respond to the original topic. If there are several issues raised in one posting, offshoot conversations will start up under the one topic making it harder to dig them out when you need to in the future.

- **Don't be afraid to start a new topic**

If what you want to say doesn't fit into any of the existing topics, start a new one. If you're responding to an existing topic, but your response engenders a new thread of discussion, start a new topic and point people to the new one in your response to the old one. It's also good to separate out any documents (e.g., proposal, summary,

strategy, etc.) that result from discussion as their own topics, so that they're easy to find, rather than burying them in the responses to the original topic. If a discussion begins under one subject line but changes to reflect something else change the subject line to reflect what is being discussed.

### **Label your topics clearly to give readers an idea of what to expect**

Use headings such as Event:, News:, Info:, Draft:, Summary: etc. and provide some context. And limit yourself to 35 characters (including spaces) or less, if possible - this makes your Subject line readable in full whether someone's getting it via a conference or a mailing list. Your group will develop its own conventions for relevant topic headings over time. Here are some examples:

NEW draft outline - feedback please  
PROPOSAL: Global Women's Networking  
October 1997 Events in Ottawa  
SWC Funding Application Update  
SUMMARY OF DEC 1996 ONLINE MEETING  
URGENT: APC GK97 gender strategy

### **Text is Easiest**

Post your messages in plain text ONLY. Regardless of hardware and software differences, everyone can read plain text online (also known as DOS text, ascii text and text only). If you need to share a non-text file (e.g., a formatted Word document, a spreadsheet, etc.), suggest that those who have the appropriate software to use the file request it directly from you via e-mail.

**Regardless of hardware and software differences, everyone can read plain text online.**

Topic93                   Submission to Standing Ctte.                   Response 1 of 3  
maureen                   women.justice                                   3:03 PM Mar 19,  
1997  
(at web.net)

From: Maureen James <maureen@web.net>

Here's a text version of the submission to the Parliamentary Standing Committee. I'm posting it in four sections (messages) so that you won't have a problem receiving it via the mailing list.

If you'd prefer a nicely formatted Word Perfect 6 version of the entire file sent to you as an attachment, please e-mail:  
brenda@web.net

Maureen

### **Quote Selectively**

Quoting someone's previously posted text is very helpful when done correctly. People get annoyed if they have to re-read word for word what they already read the first time it was posted. We must respect everyone's need to make effective use of online time and information.

Chapter 5

**STRATEGIES  
FOR WORKING  
TOGETHER**

Here's some advice:

- If there is a long “header” on the message (the information at the top of a message that shows how it traveled from system to system to reach its ultimate destination), delete everything but the name/ID of the person you’re quoting and the date and subject line of the message.
- Quote the individual pieces you’re responding to, and insert your responses right after the quotes this helps everyone follow your logic
- Only repeat enough text to help you build on the original point. Repeating the whole section doesn’t add anything to the dialogue, and in fact muddies it, making it hard to read and digest the new part you are adding.

Here is an example of helpful quoting:

Subject: Re: Volunteer orientation to the Internet  
To: CLICK4HP@YORKU.CA

Hi

> Does anyone have a step by step instruction guide for the  
> Internet that we can use to orient our volunteers?

We don't have an internet beginners' guide, but we do have a simple guide to searching the web for medical information, which would be useful once the beginners have learned the basics.

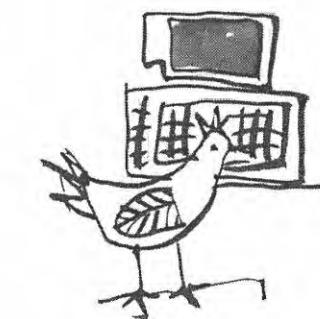
Try <http://www.mednet.org.uk/mednet/> and look under the “reference pages” link.

Hope this helps.

(Note: The part marked with “>” is the quoted text extracted from the original message.)

Chapter 5

## STRATEGIES FOR WORKING TOGETHER



This is an example of unhelpful quoting, where the poster has included all of the original message, adding only a few words at the end:

```
Date: Fri, 10 May 1996 09:47:09
Subject: Re: Getting acquainted

> Date: Thu, 9 May 96 22:53:17 -0400 (EDT)
> From: Liz Rykert <lrykert@web.apc.org>
> Subject: Re: Getting aquainted

> Hi there - great to see you taking the leap! I am going to
> do a little response to this on the list...setting culture
> and norms is important to address this. Sometimes it feels
> like a big black hole. One thing I spend a lot of time on is
> interpreting the silence.
>
> Facilitation has become for me the art of interpreting the
> silence or should I say reinterpreting...
>
> How is the report coming?
>
> The power of the written word... I have had some interesting
> chats with people about this. For example funders
> participating on-line find it very hard to post because it
> becomes official position of the funder. The HC staffers in
> our workspace for instance feel they can't say it there
> because everyone isn't on-line and therefore it wouldn't be
> fair because all groups weren't communicated with at once. We
> have worked with people to try to accept a coding system
> which doesn't seem to work.
>
> >I think Liz and Alison have done us a great service by
> >getting this listserv up and running.
>
> Thanks ;)
> Liz
>
> > ****
>
> >Liz re the report, I am having a hard time rewriting, but
must be done Monday. I want to make a lot of changes, but
just am finding it hard to get the sustained unbroken time to
really work and think through the revisions. Oh well, I do
the best I can. I'll be in touch next week with you and
Alison re possibility of a workshop.

Regards, Tom
```

## Chapter 5

### STRATEGIES FOR WORKING TOGETHER

Taking the extra time to read and listen carefully, then quote only the necessary parts of the message improves the use of dialogue in online workspaces.

## **Sarcasm, irony, and humor can backfire online.**

### **Indicate Your Tone**

Sarcasm, irony, and humor can backfire online. “Smiley” symbols such as :-) and :-( viewed sideways are universally used to show smiles and frowns and, when added to the end of a sentence, indicate you aren’t being too serious. Also, avoid responding while emotional.

### **Re-Read Your Messages**

Once a message is sent, it’s gone forever. You can’t get it back. And when you’re sending it to a group workspace it will be around for quite some time. Be sure to re-read your messages before you send them, particularly ones dealing with sensitive issues, to make sure the words you have typed are really communicating what you intend to say. It’s easier to make changes before the message leaves your computer, than to make apologies or give explanations to a larger group after the fact.

### **Don’t Shout**

Typing your messages in ALL CAPITAL LETTERS comes across as SHOUTING online. It’s also hard on the eyes. Using regular sentence case is the norm, although some people tend to the other extreme of all lower case, which seems generally acceptable also.

### **Warn Before Long Messages**

If you must post a long or large file, warn readers at the top of the message about the size and content, so they can skip it if they wish. Or, just tell people you have the file and those that are interested can e-mail you for a copy. In some cases, groups have set up separate spaces solely for keeping long documents in one place.

### **Forward Selectively**

When you forward a message you’ve come across elsewhere, leave out the big, long header and just forward enough so that everyone can see the source.

### **Ask Before Posting E-mail**

ALWAYS check with the author before copying an e-mail message to the group. There may be a reason you aren’t aware of that they posted to you privately.

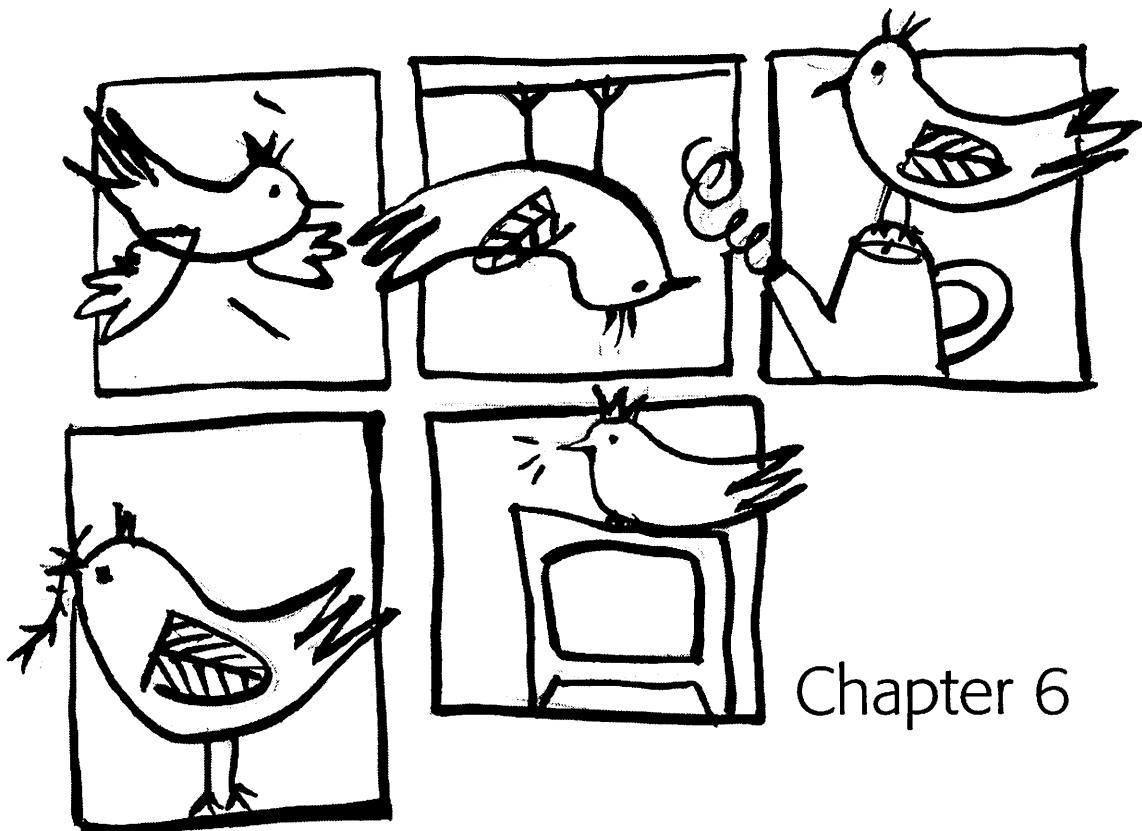
### **Limit Your Cross-Posting**

If you see something relevant to the group elsewhere online, tell people what it is and where to find it, rather than re-posting the whole thing (unless it’s really short). They may have already come across it in their online travels, and don’t want to see the same stuff everywhere they go.

### **Develop Informality Tolerance**

Messages online tend towards informality. Many people choose to write in their own unique mix of upper and lower case characters, and use more free-form punctuation. You’ll also notice a lot more spelling mistakes online than offline. Mistakes tend to be the rule rather than the exception as people often type their responses quickly, and are conscious of the time it’s taking them. Avoid critiquing typos unless they occur in critical places, like addresses, phone numbers, URLs, etc. Of course, if you’ve been asked to edit or proofread a draft document you can ignore this rule!

# **From Strategy to Action: Online Group Activities**



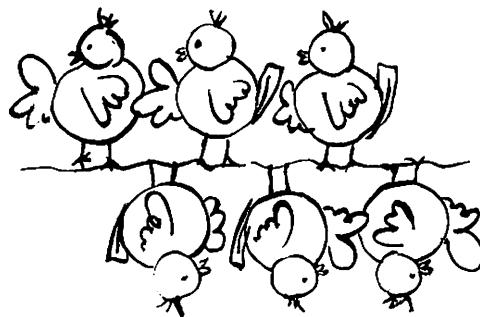


# From Strategy to Action: Online Group Activities

You can use your online workspace to collaborate in all kinds of different ways. Here we provide detailed step-by-step approaches to carrying out specific group activities online:

- How to Hold a Meeting
- How to Prepare a Joint Document
- How to Orient a New Member

Over time we expect your group will come up with even more new and innovative ways to adapt your workspace for collaborating. Chapter 6 will get you started.



Chapter 6  
**ONLINE  
GROUP  
ACTIVITIES**

**For focused group activities like holding meetings and drafting documents, the facilitator is critical.**

## **From Strategy to Action: Online Group Activities**

Online workspaces offer a myriad of group collaboration possibilities. Once you've 'moved in', on a day-to-day basis you'll find that you use your space for many different types of work, including:

- sharing announcements about events
- asking questions and getting feedback from each other on your work
- posting reports and updates from programs and activities
- sharing newsletters and other resource materials for each other to borrow and build on
- pointing each other to relevant resources, online or offline
- planning logistics and content of meetings and other gatherings
- posting outcomes of meetings
- developing fundraising and/or advocacy campaigns
- developing position 'papers'
- meeting new colleagues

You'll also work through issues of particular relevance to your group. For example, groups preparing public deputations will use the workspace for drafting and reviewing the policy statements being developed and for coaching the person actually making the presentation to prepare them to be effective. In all of these everyday uses of your workspace, the role of the facilitator is very similar to the one we have described throughout this guide.

For focused group activities like holding meetings and drafting documents, the role of the facilitator is even more critical. We have identified a series of steps you can follow to help you and your group get started. Your first attempt at these more complex activities may teach you all the things you still need to learn! After you have facilitated three or four meetings for example, you will find a style that works for you.



## Holding Meetings Online

You can use your online workspace to hold meetings. This is especially useful when your group is spread out geographically as in the case of provincial, regional, national and international boards of directors or committees, field offices, volunteer networks, etc.

Online meetings have a number of advantages over face-to-face meetings or conference calls:

- No travel, accommodation or long-distance costs so they're really inexpensive
- No jetlag
- No time zone restrictions
- No need to have everyone present at one time in the same place
- People can participate at their own convenience, and often more effectively than in time-limited in-person meetings
- More time to digest information and ideas presented, so responses can be more thorough
- You have an immediate record of the discussion which improves transparency and accountability
- Allows lead time to prepare for face-to-face meetings so that in-person time is as productive as possible.

Of course we don't advocate giving up in-person meetings altogether, but we do know that face-to-face meetings are much more productive when you can do a lot of preparatory work online.

### Steps

There are a number of steps to pulling together successful online meetings. Following these, we provide a case study of how the Association for Progressive Communications (APC) has pioneered the use of online meetings since 1990, to run a global organization. Steps 1-6 outline the things you need to do in advance of your meeting, and Steps 7-14 deal with the actual running of the meeting. The APC Case Study following these steps gives concrete examples of what an online meeting looks like.

### ❖ ❖ Pre-Meeting Preparation ❖ ❖

#### 1. Set Up A Meeting Space

First, if you think you'll be holding online meetings regularly, it's best to set up a separate private workspace for just this activity. Think of it as walking into a separate room and closing the door: you won't be interrupted by all the other things your group works on together, you'll be able to focus exclusively on the meeting agenda. Setting up a separate space also allows you to keep all the relevant information in one place.

Note: Conferences are best suited to this activity, as they immediately provide an

**Face-to-face meetings are much more productive when you can do the preparatory work online.**

**You  
need to  
schedule  
enough  
time for  
participants  
to digest  
and  
respond  
to  
discussion.**

archive of the discussion as the meeting is being held. If your group is using a mailing list, you'll need to set up a readily accessible archive at the same time.

## 2. Set Dates

Announce to everyone when the meeting will be held, well in advance. If you know you'll be meeting online regularly, you can establish a permanent schedule at the beginning of the year so that participants can plan their work and holidays around those dates. The exact amount of time needed depends on the complexity of the agenda topics and the number of people participating. You need to schedule enough time for participants to be able to sufficiently digest and respond to the discussion. One to two weeks is a reasonable time frame — any longer and you'll lose momentum; any shorter and participants will feel rushed. Often, a few individuals will not be able to be present for full the time period, but can stop in and pick up the threads when they are available. (If your meeting is international, you'll need to leave extra time for non-Internet connected networks to receive and send messages. Often there are delays when working with networks in the South.)

Energy and interaction will fluctuate over the course of the meeting. You may start strong and hit a lull midway, or you may pick up steam as participants assemble and start actively working through the issues. Some groups find they need to run overtime beyond the official end date, to really wrap things up.

## 3. Identify a Facilitator/Chairperson

As with face-to-face meetings, facilitation and chairing is critical to the success of meeting online. You can rotate the facilitator role with each meeting, identify a particular facilitator just for meetings or use the same person(s) you use for all your online facilitation. You may also identify people to chair particular topics within the agenda. If you choose this latter option, make sure all of the chairs have communicated ahead of time about how they plan to facilitate discussion, so it isn't too confusing for participants.

Meeting facilitation responsibilities include:

- Creating a framework for discussion and establishing a clear agenda. There are some standard topics that you'll always use, e.g., sign-in, updates, announcements and summaries, for example.
- Working with the group to establish mechanisms for online decision-making
- Advising participants of expectations
- Advancing the discussion by raising key questions, summarizing, and identifying themes as they emerge
- Ensuring active participation by all: encouraging “newcomers” or “lurkers” who may be new to the group and/or online workspaces, and addressing strong personalities who may dominate or disrupt the discussion for other participants
- Prompting participants by e-mail to make sure they have their say on all discussion topics
- Summarizing and closing the online discussion(s) by stating emerging consensus or calling a vote, if necessary.

Some groups have found that using the same chairperson/facilitator every time works best. Your facilitator will have learned a set of skills with your group over time that they can apply consistently and effectively, resulting in a more productive and participatory meeting.

#### **4. Set the Agenda**

As with face-to-face meetings, it's helpful for participants to know what the meeting priorities are in advance of the actual meeting. With the input of the group, the facilitator should draft and circulate the agenda to each person expected at the meeting. Changes and additions should also be shared. The final version of the agenda should be posted in the meetings workspace for reference.

#### **5. Determine Decision-Making Procedures**

The group needs to agree on a way to make decisions online. For example, some groups will finish a discussion, summarize it and then hold a vote where silence signals agreement with the majority. You'll need to find a method that best suits the operating principles of your group. Note that there will be situations when the group won't be able to conclude discussion on a topic. Some items will need to be moved forward to the next meeting, pending more information, or tabled till the next face-to-face meeting for more in-depth handling. The "rules of order" for your group should be set and communicated in advance of the meeting to that everyone knows what to expect. Of course, as you grow more accustomed to meeting online, you can expect your "rules of order" to evolve.

#### **6. Send Reminder and Expectations**

As the start date of the meeting gets closer, the facilitator should circulate a reminder message to all participants by e-mail. This is also an opportunity to remind people of their meeting responsibilities: sign-in, daily check-in, posting activity reports, voting, etc.

### **✿ ✿ Running the Meeting ✿ ✿**

See the Case Study: APC Online Meeting following this section for real-life examples of how APC holds meetings online.

#### **7. Open the Meeting**

The facilitator should mark the beginning of the current meeting by posting a "Start of Meeting" topic. This will distinguish the work of this meeting from that of previous ones.

#### **8. Get Everyone to Sign In**

It's important to get as many people to the meeting as quickly as possible, so you can maximize the use of the time you have together. Be sure to post a sign-in topic, and have everyone post to it, so you'll know when people arrive. If you haven't heard

from everyone within a couple of days, you should go looking for the ones that are missing.

### **9. Post Initial Topics**

The facilitator is responsible for posting the initial topics at the start of the meeting. In addition to the sign-in topic, this means posting a clearly labeled topic that corresponds to each item in the agenda. The facilitator, or the chair of each issue, can also open the discussion on each of these items.

### **10. Synthesize Discussion**

In order to help everyone work through the agenda, the facilitator will need to periodically synthesize discussion on each topic and present the options that have emerged, for further discussion or for decision.

### **11. Do A Half-Time Check-in**

Midway through the meeting the facilitator should summarize work completed to that point, and items still remaining to be accomplished. This helps to focus participants on the meeting priorities. It's also a good opportunity to remind everyone how much time is left in the meeting, and to encourage participation.

### **12. Prompt People to Participate**

The facilitator must be prepared to prompt people by e-mail throughout the meeting to ensure discussion on all topics is advanced.

### **13. Close the Meeting**

On the specified date, declare the meeting closed. Let participants know what will happen with unresolved items. If discussion is continuing on certain topics, let everyone know that although the meeting is officially over, any new discussion will be carried over to the next meeting. Sometimes, if the group needs more time to work on a particular issue, you can extend the meeting, but you need to get agreement from everyone before proceeding. Alternatively, those that are still interested in working on a particular issue may want to collaborate in a smaller group by e-mail, and post the results of their work to the larger group before or at the next online meeting.

### **14. Post A Meeting Summary**

Once the meeting has run its course, it's up to the facilitator to post a summary of what occurred: final decisions, unresolved discussions, and any other important information. The summary serves as a condensed record of the meeting, as well as a way for participants to verify the decisions. Some or all of the meeting summary can be circulated to others who would be interested in the outcomes, as a way of keeping them informed. Before doing this, clarify with the group which sections are appropriate for wider circulation.



12/03/96	212	START OF DECEMBER 1996 MEETING	2 igc:efarwell
	213	Who's Here	22 igc:efarwell
	214	Announcements	4 igc:efarwell
	215	Secretariat Report	4 igc:efarwell
	216	Financial Reports	7 igc:efarwell
	217	Member Reports - Dec. 1996	14 igc:efarwell
	218	<apcaccess> Report	19 igc:efarwell
	219	APC Rep's to the UN, 1997	13 igc:efarwell
	220	1996 Regional Meetings Update	5 igc:efarwell
	221	Program Areas for APC?	20 igc:efarwell
	222	S. Africa Meeting: Feb. 15-22	2 igc:efarwell
12/04/96	223	S. Africa Meeting: Funding	4 igc:efarwell
	224	S. Africa Meeting Agenda	9 igc:efarwell
	225	S. Africa Meeting: Sightseeing	17 igc:efarwell
12/05/96	226	Bulk Equip purchases offer	igc:efarwell
	227	APC Book Update, Outline	2 igc:efarwell
	228	Written Materials outline,plz edit	igc:efarwell
12/06/96	229	IC Recommendations to Council	7 ax:cafonso
12/09/96	230	Membership Applications	4 ax:apcadmin
	231	Conditional Members Evaluation	14 ax:apcadmin
	232	REPORTS: Regional Meetings, etc.	7 igc:efarwell
12/17/96	233	Report: Fundraising WG	1 igc:efarwell
	234	SUMMARY OF DEC 1996 ONLINE MEETING	igc:efarwell

\*\*\* END OF TOPICS \*\*\*

### Case Study: APC Online Meeting

Here you can see the mechanics of a real online meeting. The Association for Progressive Communications (APC) is an international nonprofit computer networking association. APC has member networks in 25 countries — Web Networks is the Canadian member of the APC. APC operations are overseen by a Council made up of one representative from each of the member networks. Council members meet online two times a year, and in-person once a year, and have been doing so since 1990. The APC also has a Secretariat that runs the daily operations of the association. The Secretariat staff are responsible for facilitating each online meeting.

APC has set up a private conference devoted exclusively to holding Council meetings. To show you how APC conducts online meetings, following is a sample topic index from the APC meetings conference. Refer to the notes following the index for explanation.

#### Things to Note:

- Dates of each topic are shown to the left, as are the individual topic numbers.
- Numbers to the left of the account name represent the number of responses to each topic. For example, under the “Who’s Here” topic, 22 Council members signed in.
- Topic titles are short and easy to understand.
- “efarwell” was the designated facilitator for the meeting.

- There are opening and closing topics for the meeting.
- The facilitator posted the 10 initial topics on the first day of the meeting.

As an example of how the space is used, let's look at topic number 212, where the facilitator sets the parameters for the meeting:

\*\* Topic 212: START OF DECEMBER 1996 MEETING \*\*

\*\* Written 10:11 AM Dec 3, 1996 by igc:efarwell in  
web:apc.meeting \*\*

This marks the start of the December 1996 online APC Council meeting.

The meeting is scheduled to go to December 18. Please follow this meeting carefully these next 2 weeks as we want to make sure it is thoroughly completed before the holidays.

Thanks,  
Edie

Response 1 of 2

\*\* Written 10:15 AM Dec 3, 1996 by igc:efarwell in  
web:apc.meeting \*\*

Just so people remember, the policy for online meetings is that all council members are expected to participate. If for some reason someone cannot participate, please designate another person from your node to participate and vote in your place.

Other network staff are welcome to follow the meeting, and to post information if needed.

Edie

Response 2 of 2

\*\* Written 11:27 AM Dec 3, 1996 by igc:efarwell in  
web:apc.meeting \*\*

Please see the topic 8/29/96 "SUMMARY OF JUL/AUG 1996 ONLINE MTG" two topics above this one for a summary of the previous meeting.

Edie

As you can see, the facilitator makes sure to remind people of procedures and point them to useful information that exists elsewhere in the meetings conference.

Status reports from member networks, updates from working groups, and Secretariat reports are important components of each online meeting. These are posted at the beginning of each online meeting for information, and to set the stage for further discussion.

Following is a sample of a halfway check-in posting. Note how the facilitator has summarized the action items each participant needs to take:

\*\* Written 1:54 PM Dec, 12 1996 by igc:efarwell in  
web:apc.meeting \*\*

Action Items to Do in the Online Meeting:

Hi all Council members. We need to wrap up the online meeting by the end of next week, so need everyone to participate now. Main items for attention are:

1. Read reports:

- Secretariat
- Financial (a few more still coming)
- Network Reports that are in already
- Interim Committee Recommendations to Council
- Membership Applications

2. Post:

- Network Reports
- Work Group reports if you are a WG convenor

Agenda Topics:

3. "APC Representatives to the UN, 1997"

- post if you have an interest in having a UN pass at any of the UN offices for 1997

4. "Program Areas for APC?"

- Post whether you agree with the principle of defining program areas to frame APC's work.

5. "S. Africa Meeting: Dates Feb. 15-22"

- Take note of the f2f meeting dates.
- Tell me if you need a letter for a visa.

6. "S. Africa Meeting: Funding"

- Take note that we are working hard to find funding.
- Please prepare to fund your own way
- Try to find local funding.
- Let me know if you need letters/proposal for local funding.

7. "S. Africa Meeting Agenda"

- Take note of what the meeting venue will be like.

8. "S. Africa Meeting: Sightseeing"

- Post now if you might want to stay afterwards for sightseeing.

" IC Recommendations to Council"

- Please post agreement with principles of IC work to date.
- Post further recommendations if you have them.

Chapter 6

**ONLINE  
GROUP  
ACTIVITIES**

Upon completion of the meeting, the facilitator produces a summary of all decisions, and unresolved items. This summary is posted in the meetings conference, as well as in other internal APC staff workspaces.

By holding regular online meetings instead of flying Council members around the world to meet in-person, APC saves hundreds of thousands of dollars each year. And, meeting decisions and action items are easy to pull together from the online discussion, so follow-up work can begin immediately.



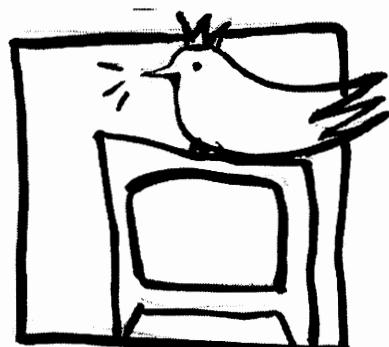
## Drafting Joint Documents

Groups can use online workspaces to collaborate in the production of documents: fundraising proposals, reports, promotional materials, etc. Often the most efficient approach to producing a large document is to involve each of the individuals with expertise in a particular area. This allows you to share the responsibilities of writing the content and distribute ownership of the outcome. Groups have reported this has positive impacts on the sense of group cohesion and involvement.

As facilitator, the assistance you provide will make this task easier and help to keep the work moving along. Here's an approach that works for some groups:

### 1. Outline the Work

Use your workspace to let everyone know that you need their help in the production of a document. Identify the tasks involved: drafting the outline, writing sections, giving feedback, pulling the whole document together, editing and proofreading. As facilitator, your role is to get everyone working together on this and to keep the process moving forward.



This sample posting outlines exactly what the writer needs from the group she is working with, and in what form she will be getting material to them. It also alerts them to be on call to provide feedback:

```
/* Written 11:46 AM Oct 21, 1996 by maureen in web:spn.exec */
/* — "Draft Sections Coming At You!" — */
```

Hi - over the next day or so, I'm going to be posting sections of the proposal in here for feedback - I'm not sure if people prefer small chunks, or one big whole thing... so I'll do both :‐)  
- also it makes me feel like I'm getting somewhere when I can move one section off the drafting table :‐)

I'd appreciate \*all\* sorts of feedback:

- language: I'm not totally familiar with the ways things are referred to in the social/human/community/voluntary sector - but we also have to remember who's reading the proposal
- names of services: suggest new ones if you hate what's there now
- clarity suggestions: when you keep writing pages and pages of stuff about the same general thing, you begin to feel like nothing's making sense
- more interesting titles for sections
- suggestions for ordering of content
- reminders of over-arching themes that aren't coming out strongly enough in the proposal text
- etc.

thanks heaps!

Maureen

## 2. Establish Co-Production Guidelines

To facilitate and coordinate the work of the production team, we recommend all writing be done in text-only format until it's ready for final production and formatting. This way people don't have to worry about accommodating different word processing programs, and everyone is able to see the document as it develops right in the workspace, without having to deal with file attachments.

If there are some people working together on the same section, it's important for them to keep in close contact to avoid making changes to the same parts at the same time. You'll need to develop a system of "checking out" the sections being revised, and checking them back in again when ready for more feedback. When they are "checked out" no-one else can work directly on the text, but they can still send suggestions to the person who has checked them out.

### **3. Identify the Working Group**

Once you've identified the process, you'll need to recruit people. You may want to limit this invitation to those people who absolutely need to be involved, or you may want to widen the participation. Who and how many are involved really depends on the specific task. Using the workspace as a place for developing the document means that even those people who can't be directly involved in the hands-on work, can still see the document's evolution as drafts get posted.

### **4. Post Document Outline**

Post an outline of the document for discussion indicating how long people have to give feedback, and watch the responses carefully. Your job will be to incorporate changes people are suggesting, and to compile and re-post these in a timely way.

```
/* Written 12:14 AM Oct 14, 1996 by maureen in web:spn.exec */
/* ----- "Proposal Outline - Sections Up for Grabs!" ----- */
Hi...
```

This is an overview of the pieces that will ultimately make up the final proposal, and it's based pretty much on the outline given in the call for submissions. Posted here so you can be thinking about pieces to be filled out.... and how they relate to each other. I've begun filling out a lot of these pieces, but they aren't in any form yet for comment :-)

Please let me know which sections you can work on - We need them by Oct. 20th.

Maureen

```
Proposal Outline
Cover Letter
Title Page
- Project Title
- Name of Group/Consortium or lead partner/Contact info for main
contact
Executive Summary
- Brief Description of project incl. Project objectives and key
results
- Amount of funding, and reason requiring public funding
- Total project cost and duration
Context
Statement of Needs (Rationale)
Proposed Response (Detailed Project Description)
-Vision
-Mission/Goals/Key Objectives
[ETC.]
```

## 5. Delegate Tasks and Communicate Expectations

Once the outline is agreed to, ask people to post the sections they are prepared to write. Watch to ensure all parts of the document are claimed by participants. Once your group is identified, you'll need to let each person know what's needed and about how much time they need to commit to the process. Sketch out a timeline and be clear with everyone about deadlines. Each person will need to check the workspace regularly to see how the other sections are developing so that theirs will fit in. Participants are also responsible for posting their sections as they get drafted. It is helpful to have a single posting clearly giving people instructions of who is writing which section(s), when things are due, and who to contact if they are having problems.

## 6. Post Drafts of Sections for Feedback

As each person finishes a section, it should be posted to the group for feedback. Be sure to be clear about the type of feedback you're looking for, and when you need it by.

```
/* Written 12:18 AM Oct 14, 1996 by maureen in web:spn.exec */
/* ----- "PRODUCTS - please comment" ----- */
Warning: LONG DOCUMENT!
```

Hi everyone... Rhonda, Mary and I have been working to assemble the draft proposal. Main piece that needs feedback ASAP is this messy "products" section. Once we agree on the products, the rest will flow from them. We're trying to outline useful concrete products/processes/activities that the funder will be interested in funding, that partners will want to do (i.e. buy into), and that are actually do-able.

When you're looking this over, try not to get distracted by the words describing the products (which are very draft), and focus on:

- a) is this something we want to deliver
- b) can we deliver it, and
- c) is this the best way to deliver it (i.e., I'm sure there are more neat concepts and tools that could be included here that we haven't mentioned, and less interesting things that could be deleted).

Also, please suggest ways to present the information that may make it easier to digest.

Post feedback here ASAP 'cause we three are spending all day Tuesday making this a document to be circulated to the partners (to get them excited and committed to this project!) for the Thursday afternoon meeting.

Thanks  
Maureen

Chapter 6

**ONLINE  
GROUP  
ACTIVITIES**

## **7. Compile and Post the First Draft**

Once all of the sections have been posted, and have been worked through by the group, the full document can be pulled together and edited (by cutting and pasting, or downloading, the individual pieces into a single word-processed document). The full first draft should then be posted to the group. If it is a long document, you should post it to the group in two ways:

- 1) in its full form so the group can print it out,
- 2) broken up into individual sections so that participants can post changes or suggestions for each piece. This makes the work of compiling the next version of the document easier.

## **8. Keep Everyone Posted**

As you keep working on the document, let everyone know how things are going and when they can expect to see more pieces of it.

```
/* Written 6:00 PM Oct 24, 1996 by maureen in web:sdn.exec */
/* _____ "Where We're At" _____ */
```

Thanks for all the comments so far, keep them coming...

I'm putting together as full a draft as I can, incorporating feedback up till now, for you all to look over on the weekend :-)

Rhonda's doing budget/business plan/marketing plan/project implementation plan/technical implementation plan (i.e., anything that requires a spreadsheet or numbers calculations)

The proposal is due Wednesday, we should be formatting it Tuesday, which means we need everything done by day's end Monday (or night's end)... does that sound ideal???

Maureen

## **9. Post the Final Version**

You may need to go through many drafts and revisions. For the group's future reference, once the final text is assembled, it should be posted in the workspace as its own separate topic in both text-only and final formatted versions. This makes it easy for people to find and use again.



Throughout the whole process, as facilitator, you will be encouraging people to give feedback on sections in development and reminding people of timelines. Be sure to let people know when the last possible dates are for feedback.

**Warning:** Some people may feel intimidated to post draft work in a common space online. Seeing their contributions in print can feel intimidating to some. Before you start be sure to warn people not to take editorial changes personally. Ask group members to use discretion when posting critical comments.



## New Member Orientation

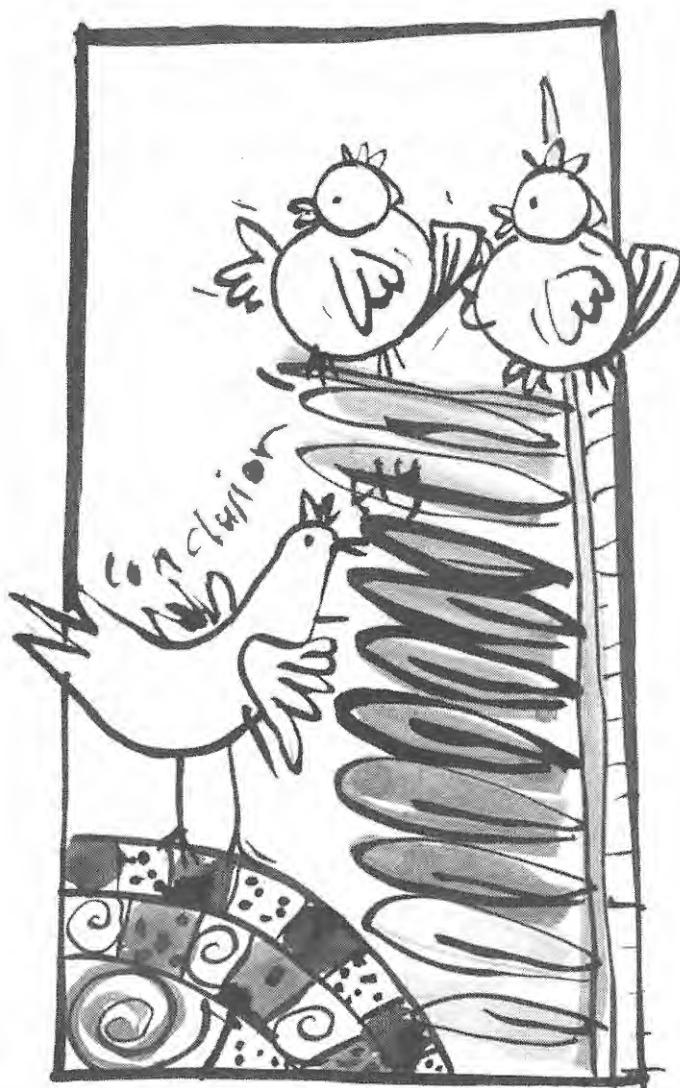
As facilitator, when it comes to orienting new members to the group, you will likely have a dual role: technical and social. You may be called upon to help the person get connected, get a new user ID set up, assist them setting up equipment or trouble shooting connections as well as introducing them to your workspace and the work of your group!

A quick way to bring a new group member up to speed is to give them access to your online workspace(s). Online workspaces provide a capsule history of the work a group has undertaken together, as well as a window into the group's culture and ways of collaborating. If you're bringing in a new staff member, volunteer or participant, you can have them take time each day for the first week or so to review the postings in your workspaces. They will learn about what the group has accomplished, where outstanding issues may lie, and can then ask informed questions not just of you but of anyone who has posted. You or others in the group can then set aside time to answer any questions they might have. Group workspaces are an essential component in your orientation package!



Here in Chapter 6 we've covered just a few of the many activities your group can carry out in your workspace, to get you started. These examples provide frameworks and approaches for you to adapt, as needed. We know you will discover all sorts of new and unique ways to use your workspace effectively.

# A Few Final Words of Encouragement...



Conclusion

## A Few Final Words of Encouragement...

Learning to work together online is exciting and scary at the same time. Like the thrill you get from a roller coaster, there are definitely ups and downs: you'll feel elated the very first time you see a conversation you have nurtured develop before your eyes... and you'll probably have agonized over every word in each posting that got the conversation going in the first place.

When we started working with groups online, we had to learn all the things we have explained in this book. We did this partly by experimenting, partly by finding others who had gone before us, and partly by being open to the learning in front of us.

Following is an exchange between an experienced online facilitator (you know her well!) and one just starting out. It may resonate with how you are feeling now that you've gone through this book and are facing the real prospect of moving your group online to work together. We feel it captures, and addresses, many of the anxieties and concerns a newcomer faces in beginning to work collaboratively online:

Date: Fri, 28 Feb 1997 15:38:58 - 0400 (EDT)  
X-Sender: lrykert@pop.web.net  
To: community-list@list.web.net  
From: Liz Rykert <lrykert@web.net>  
Subject: Facilitation Concerns

Hello all...

Sandra has expressed sentiments about working online that I hear regularly.

First, let me say as a relatively new computer user myself, I remember vividly the cold sweat I felt the first time I posted to a public space... and the first time I sent a personal e-mail to a whole list when it was clearly intended for one person... oops ;-) Sound familiar?

I have learned to gather new skills as I go and to trust that when I make a mistake someone will undoubtedly let me know. At any one time here we will have people brand new to the Internet and online workspaces, old hands, and lots of people somewhere in the middle.

At 08:34 PM 2/27/97 -0500, Sandra Smith wrote:  
> In my paid work, I'm one of the senior management people in >the organization who is... "really trying to get it - amid >chaos, confusion and crisis".

*continued on next page*

## CONCLUSION

When I first went online as a facilitator for my community project, and tried to visualize what an online facilitator might do, all I had to draw on was my experience of facilitating community meetings, workshops, etc. I rolled out these skills online very easily and learned what worked and what didn't.

You learn that some things require an immediate response, and people learn to ask for that. But for those things that were not time sensitive (and there are many) I realized I could treat the online space like a continuous social workspace with people coming and going at their own pace. My job was to create a well defined environment: drawing out norms and accepted practice among the members and reflecting this back to them. This generated a sense of safety among the group members - so people would know what was expected of them.

Secondly, I began to pace things... To post with suggested guidelines for responding for example, and to listen to the silence in ways that tried not to assume a lot. Each online space I now facilitate has a different pace based on the norms each group establishes.

Thirdly, as we moved into a phase where most people had been online for a period of time (two years) we encountered the need to include new people, to maintain the space as a lively and reliable source of information, and to not undermine our online workspace as the \*first\* source of information for the project.

Recently, in a focus group for evaluating the partnership for the project, the online workspace was described as part of the "glue" which holds the collaborative partnership together in healthy ways.

Sandra reflected:

> I found I had NOT established these projects with a  
> vision of long-term sustainability. I had foolishly  
>placed myself "in control" of key processes, rather than  
>taking my role "out of the loop". So, under the guise of  
>empowerment, I had created dependency.

Working online ensures healthy interdependent relationships and distributed responsibility. It is not a matter of being "in control" or "out of the loop" but rather understanding your role within the group and generating processes where people recognize their responsibilities to contribute, share and work together.

When your group moves online there is a natural progression to move the person (or group) with central roles to the

## CONCLUSION

side on an equal footing with other participants. The online space becomes the place where we gather, and encourage initiative and distributed leadership. As the coordinator, I assume the role of online facilitator and modify my role to animate the discussion, start new topics, and move the group along if they are getting stuck. Even with all our experience we still have some members who are more active online than others, some who are struggling with learning the skills they need. This will be ongoing and we have begun to develop strategies to meet these needs as they arise. It is not perfect but despite these problems people are all keen and willing and open to trying.

I think taking the leap and jumping in to be responsible for a space led me to develop a sense of confidence where I was not deferring to technical expertise but instead challenging the "techies" to work with me to build the most accessible and friendly environments for us.

On learning the ropes, Sandra noted in her effort to join an online discussion:

> My message bounced back to me with some error - but so far I  
> have not let my bumbling stupidity halt me - I'll try  
> again.

It is not "bumbling stupidity" at all. You are trying on your own to learn the skills which are assumed to be so easy for others. We've all been there and remember the frustration. When training people I remind them: \*there are no stupid questions\*. By asking, you learn... and no doubt your question is a burning issue for many others.

> I'm ignorant about the technology - but I have a lot of  
> "inside" experience with bureaucracy, and it frustrates me  
> that we don't get more support for working online with our  
> communities. One of the barriers within institutions at the  
> moment, I think, is that everything is ends oriented. Proc  
> ess is secondary. We have to continually fight to continue  
> community development work - because this requires "faith"  
>that people are solutions, not problems.

We need to shift our mind set away from one-off computer training sessions and towards developing online skills over time. People need some basic training at the beginning: getting connected, learning the software and tools, getting their online bearings. Then they need access to champions who will be quick to respond to questions, who will be open to the new ways of working that those learning are experimenting with, and who will assist them to capture their ideas and make them reality. It is not a linear "first this, then that" experience. It is immersive and inclusive of the online workspace itself as an ongoing source of learning.

*continued on next page*

## CONCLUSION

Sometimes I make provocative statements to people like:

"I will not accept a job offer if I can not have internet access."

Why?

Because they (the employer) are simply not getting their money's worth. By working online I have instant access to a rich world of expertise and knowledge and, and, and... To ask me to work in isolation means I will reinvent the wheel, I will duplicate efforts, I will waste resources. Power and control issues become central. There is a paradox I can see between what Sandra describes as:

> I see the electronic workspace as a similar problem. In an  
> environment where short term efficiency rules - it's  
> difficult even for us "champions" to argue for strategies  
> where the "up front" learning curve and investment is great  
> - and the short term outcomes are questionable.

There is a strong relationship between how power and control are exercised and the use (or lack of use) of the electronic workspace. Understanding online transparency and accountability transforms our face-to-face work places... slowly, but surely!

Cheers,

Liz Rykert  
lrykert@web.net



Okay... now's the time to immerse yourself. You are about to begin a journey of working together which at some times will feel like an adventure, and at other times like a vacation. By trying things as we have suggested, or in ways you know will work for your group, you will learn your new role as an online facilitator. Online workspaces are open systems that you can shape to harness their capacity to help your group do its work. Understanding them, designing them, letting them evolve and grow, are all now within your reach.



## CONCLUSION

## Appendix A

# Managing Access To Your Conference

If you're running a private conference on Web Networks, you'll need to manage who has access to it by adding and deleting user permissions. It's pretty easy to do once you get the hang of it.

The settings you need access to for this job are only accessible in the Web Networks text-only interface, so you'll need to be able to connect with a 'terminal' program or 'telnet' to Web Networks to use them. See the *Web for New Users* guide for detailed instructions on connecting to the text-only environment.

The Web Networks conference system has evolved from the text-only system to the graphical interface over the last few years. However, the facilitator tools have not kept pace. You'll see an awful lot of options on the "facilitator screen," but most of them have no effect on the graphical version of the conference. So we've only explained the one (maintaining the "permissions" list) that is absolutely necessary for you to know about.

## Accessing Facilitator Tools

Technical facilitator options are started from the "facilitator screen." To get there:

- Telnet (or direct-dial) to Web Networks
- From the main menu, type **c** for Conferences
- At the **Conf?** prompt, type the name of your conference (e.g., **act.cuts.ont**)
- Still at the **Conf?** prompt, type **!**

Now you'll see the facilitator screen. (You don't need to understand it, you just need to get there).

## Setting Your Permissions List

One of your jobs as facilitator, is to let people into your conference. To set the access list, type **p** for permissions at the **Option:** prompt. First you'll see who currently has access to your conference. You should see at least the following settings in the permissions list:

1	grp:webadmin	Facilitator/R/W
2	sys:news	Read/Write
3	sys:Other	Read/Write

These three settings come with every conference. **webadmin** is the group that Web Networks User Support staff are in, and they have access to every conference to be

able to help out in case of technical difficulties. The other two are settings for machines, to ensure your conference is technically maintained properly. You'll also probably see some individual user permissions which will look like this (the actual IDs would be different):

## Adding Users

usr:support	Read/Write
usr:jdoe	Read/Write
usr:asmith	Read/Write

To add users to your conference:

- At the **Option:** prompt, type **i** for insert
- At the **Entry type** prompt, type **u** for user
- At the **Name:** prompt, type just their user ID (e.g., **support**, not **support@web.net**)
- Next you'll see the **mode:** prompt. This is where you decide the level of access the user will have. The default setting is **read/write**, and this is usually what you want. To confirm, Press **Enter**. (If you're giving access for a co-facilitator, then you'd press **f** before pressing Enter so that this person also gets Facilitator access.)
- You'll be back at the **Entry type** prompt again. You can continue to add users, as above, or you can type **q** to return to the **Option:** prompt.
- To quit the facilitator screen, type **q** again, and you'll be back at the Web Networks main menu.

## Deleting Users

To remove a user's access to your conference, follow the instructions above to get to the facilitator screen, and into the permissions list.

- At the **Option:** prompt, type **d** for delete
- You'll be prompted for the number of that person's ID in the list. Type it in and press **Enter**. If you don't see the person's ID in the list that appears, type the **+** sign to see more of the list.
- When you're finished deleting users, type **q** at the **Option:** prompt, to quit.
- To quit the facilitator screen, type **q** again, and you'll be back at the Web Networks main menu.

## APPENDIX

### A

**Note:** DO NOT delete the following access permissions:

1 grp:webadmin	Facilitator/R/W
2 sys:news	Read/Write
3 sys:Other	Read/Write

These are necessary for technical system maintenance.

## **Practicing Permissions Management**

You can use the Web Networks test conference to experiment with facilitator commands. However, after changing them you should return the settings to what they were originally, wherever possible. For example, if you experiment with conference access permissions, be sure that grp:Other retains Read/Write access to the test conference when you leave. If you run into any trouble, don't hesitate to e-mail support@web.net or call (416) 596-0212 x.2 or 1-800-932-7003 and ask for User Support.

## **APPENDIX A**

# Appendix B

## Mailing Lists on Web Networks

Web Networks' mail list service offers you a variety of features when creating mail lists. Each mail list costs \$75 plus G.S.T. Please complete the following form, indicating the kind of mail list you would like to operate and return this form to Web Networks by fax at (416) 596-1374.

Additional charges for Mail list options included below:

**Standard Archive:**

Setup fee of \$25

Annual fee of \$50

**Digests:**

Set up fee of \$25

Annual fee of \$50

**Hypermail WWW Archive:**

Set up fee of \$25

Annual Fee of \$25

**Part 1:**

**Administrator/Requestor of Mail List:**

Organization Name:

Web User ID:

Address:

Tel:

Fax:

Note: Except for the list name, the options below that you choose now can all be modified at any time.

### **1. Name of Mail List:**

Please provide a name for the mail list using the following conventional format: <YOUR\_CHOICE>-l@list.web.net For example, a mail list pertaining to actions being taken against the Tory government's social spending cuts might be called: torycuts-l@list.web.net. We suggest that you keep the name brief (10 characters max.).

Please call our/my mail list:

\_\_\_\_\_ -l@list.web.net

**2. Single user that owns the list:**

This must be a valid Internet e-mail address or a Web Networks UserID.

**3. Password for the list:**

Web Networks will confirm the password once the mailing list has been set up on our system.

**4. Should the list be open or closed?**

- Open     Closed

Majordomo lists are either open or closed. An open list is one to which anyone can subscribe themselves. A subscription request sent to Majordomo for a closed list is forwarded to the list owner for approval.

**5. Moderated?**

If yes, the administrator is able to approve all postings to the mail list before they are dispersed to the mail list subscribers.

- Yes! I would like to moderate my mail list.  
 No, I do not want a moderated list.

**6. Should people on the Internet be able to see that Web Networks carries this list, by sending the 'lists' command?**

- Yes     No

A list can be configured as non-advertised. We use this configuration to prevent your list from being listed in the output of a "lists" command. TIP: If you want to minimize the possibility of unauthorized individuals 'breaking' into your list with unsolicited commercials, you should select the "NO" button.

If YES, give a one-line description of the list:

This description will be sent in response to the 'lists' command. Description should be 50 characters (\*not\* words) or less.

**7. Should everyone in the world be able to find out who is subscribed to this list, even people not on the list?**

- Yes     No

**APPENDIX  
B**

If you answer YES, then anyone in the world will be able to send the “who” command and see who is subscribed to the list. If you answer NO, then you must supply an answer to the following question. TIP: To avoid unauthorized use of your mailing list, you should select the “NO” button.

**8. If not everyone, should people on the list be allowed to find out who is on the list?**

- Yes       No

If you answer YES, then only subscribers to the list will be able to see who is subscribed to the list. If you answer NO, then no one will be able to see who is subscribed to the list. You will be able to see who is subscribed to the list by using the “approve” command in conjunction with the “who” command.

**9. When your subscribers reply, make them reply to list or sender?**

- List       Sender

The default is to sender and you can change this default later, if you wish. WARNING: If you choose to have all replies go to the list address, there are situations when some system mailers may send bounced messages to the entire list, creating havoc for everyone. While this can happen no matter which setting you choose, it is more likely to happen when replies are set to go to the list.

**10. Please provide a description or purpose of the mail list:**

The initial informational message (also known as the “info” file) welcomes people who join the list or is sent to those that specifically request the information through a Majordomo command. There is no limit on the size of this message (within reason). It should be plain text, and we suggest a line length of 65 characters with ‘hard’ returns ending each line. Instructions on how to subscribe to/unsubscribe from your list are automatically included in this initial message, so there is no need to restate that here.

**11. An archive file can be created which anyone subscribed to the digest list can retrieve at a later date, a convenient feature for new subscribers.**

(Set up fee of \$25, Annual fee of \$50)

How long would you like to save archive files?

- Forever (never delete)       Number of Days

## **12. Signature File**

You can create a signature file that is included at the end of each message posted to the list. It can contain information on how to unsubscribe, or how to find a related web site for the group, or who to contact if subscribers are having problems.

Do you want to have a signature file attached to your list?

Yes  No

If YES, please provide the information here and make it no more than 256 characters (\*not\* words).

## **13. Hypermail WWW Archive**

Would you like your mailing list postings to be converted into HTML and then posted to your organization's web site?

Yes  No

If Yes, please provide the URL of the site where you want the mail list postings to appear:

If you only want a majordomo mailing list, without linking it to a conference or digest, submit this portion of the application form. Otherwise, go on to complete Section 2 or 3 before submitting this form.

## **Section 2: Digest (\$25 Set up fee, \$50 Annual fee)**

If you are completing this section, you should already have completed Section 1 above. Digest lists will use your list name with the word 'digest' appended. For example, "sc-announce-digest".

**1. If you would like the one-line description for the digest list to differ from the linked ordinary list, please give a one-line description of the list that will be sent in response to the 'lists' command.**

The description should be 50 characters or less.

Note: 50 characters, not 50 Words!

**2. Please provide a description or purpose of the mail list digest.**

Use the same info message as in the associated non-digest list.

- Yes       No

Use a new info message. Please include it here:

Initial informational message, to welcome people who join the list, or to send to those that specifically request the information. The initial informational message (also known as the “info” file) welcomes people who join the list or is sent to those that specifically request the information through a Majordomo command. There is no limit on the size of this message (within reason). It should be plain text, and we suggest a line length of 65 characters with ‘hard’ returns ending each line. Instructions on how to subscribe to/unsubscribe from your list are automatically included in this initial message, so there is no need to restate that here.

Note: It's important to tell subscribers that they should not subscribe to the digest list and the non-digest list or they'll get duplicate messages.

**3. If you would like to move addresses from your non-digest list to the digest list, please answer one of the following:**

- Move all the addresses to the digest list.

It's wise to let everyone know you're doing this first.

- Move only the addresses listed here

Please list each address on a line by itself.

**4. Add these new subscribers to the digest list.**

Please list each address on a line by itself.

**5. How often would you like your digest issues to be mailed out?**

Once or more each week. Please select the day(s):

Mon  Tue  Wed  Thu  Fri  Sat  Sun

Every day (digests are mailed after 12:01 a.m. on this day.)

**6. Would you like the digest issues to include a table of contents?**

Yes       No

**7. Each Digest message is given a digest volume number and issue number. The default setting is volume 1, issue 1 (v1.001).**

Would you like to use these defaults?

Yes       No

If No, please give the volume and issue numbers you would like to start with:

\_\_Volume Number    \_\_Issue Number

**8. You can have each digest message saved in an archive file which anyone subscribed to the digest list can retrieve at a later date, a convenient feature for new digest subscribers.  
(Set up fee of \$25, Annual fee of \$50)**

How long would you like to save archive files?

\_\_ Forever (never delete)

\_\_ Number of Days

**Majordomo Order Form**

**Section 3: Mail List to Conference Gateway**

Fill out this section only if you want your new Majordomo list linked to a community or private Web Networks conference. Please note that we must first set up the conference (if it has not yet been created) before we can create the gateway from the mail list to the conference.

If you are creating a gateway to an already existing conference, what is the name of this conference?

If you are creating a new conference please fill out this Conference creation form:

**Part I**

**1. Requested Conference Name (14 characters maximum):**

All conference names must be 14 characters or less, and use only alphanumeric characters and periods. No capital letters may be used. Names of private conferences should start with the organization's acronym, followed by a period, then a word or words descriptive of the purpose of the conference.

Names of community conferences must fit evolving Web conference naming guidelines. (You will see many old conferences on the system which do not fit the guidelines as they now stand; we are trying to make the names of new conferences more sensible for users.) Conference names are usually two parts, separated by a period, with the more general part coming first. Organizational acronyms are not generally allowed as part of the name of a community conference. The goal is to create a name from which users will be able to determine the content of the conference.

**2. Community or Private:**

Community conference requests must be reviewed by network staff. With over 800 public conferences already available, communication is more effective by using these whenever possible. Before considering creating a new community conference, we ask you to:

- a) look for an appropriate existing conference and start your discussion/posting there
- b) raise your idea in the 'ideas' conference to see how much interest there is among other users.

**3. Description of Conference (254 characters maximum):**

This description will appear in the conference (l)ist (the directory), the 'conferences' conference, and in topic 1 of your conference as Purpose of This Conference.

**4. Keywords (128 characters maximum): [Community conferences only.]**

Used for searching the conference (l)ist by subject. Separate keywords with a space or multi-word phrases will be entered as individual words since the conference (l)ist function allows only single-keyword searches (e.g., human rights cannot be searched for as a phrase).

**5. Contact account:**

There is a 15 character maximum here; two userIDs may be entered if they are within the limit. Displayed in the conference (l)ist, this account will be contacted by users and Web staff for information about the conference. It will be given facilitator access.

**6. If there is a sponsoring organization:**

- A. Full Name (60 characters maximum):
- B. Acronym (8 characters maximum):

The sponsoring organization shows up in the conference (l)ist.

**APPENDIX**

**B**

## **Part II**

### **1. Access Permissions:**

- A. Facilitator(s):
- B. Read/Write Access:
- C. Other (Read/Respond, Read Only, No Access):

The facilitators of the conference can change the permissions after the conference has been created — a Web Networks staff person just sets up the initial list. The contact account will be given facilitator access. If the conference is private, permission for Group:Other (general users) will be set to Null.

### **2. Network?**

[Have users at other APC networks requested access?]

(yes or no):

If so, which APC networks?

This item affects whether or not your conference will get “networked” (i.e., shared with) other APC partner networks. This can also be changed at a later date, if requested.

### **3. Expanded Conference Title (39 characters maximum):**

This title appears at the top of the screen, when looking at the conference index or a conference posting.

### **4. [Private conferences only] Message to be displayed to users without access privileges who try to visit the conference:**

A typical message would be: pf.agenda is a private conference for members of Planet First! in which agendas are planned for online meetings. Contact ‘pfnat’ for more information.

### **5. Moderated?**

[Only used in very special circumstances] (yes or no):

If yes, to which e-mail address should messages be sent?

A few conferences on the system are moderated. This means that postings are sent by email to one account, which then reviews them before posting, perhaps editing them for conciseness, or returning to sender as inappropriate for the conference. There are very few conferences which are best moderated (pn.announcements and en.announcements are exceptions). Disadvantages include delay in posting, the need for a committed moderator, and the appearance that the conference content is censored.

## **APPENDIX**

### **B**

# Appendix C



WEB NETWORKS:

## For People Not for Profit

Web Networks is a nonprofit organization dedicated to serving the needs of the social change community in Canada. Providing a full range of Internet-based services, we assist groups in creating successful online strategies: from simple navigation to Intranetworking to Internet promotion. We provide the most comprehensive communications tools & resources for nonprofits in Canada.

### **Web Networks Community Resource Centre**

Our centre piece is the Community Resource Centre — a unique WWW-based information and action clearinghouse. With both public and “members only” access, the Community Resource Centre is a doorway to a wealth of tools and information relevant to the needs of the social change community in Canada (<http://community.web.net>).

### **Full Internet Provider**

Sure you can get your Internet access anywhere, but when you buy from Web Networks you're supporting Canada's online social change community. Our prices are competitive, our modems are fast, our service is reliable and we offer local dial-up in over 20 major Canadian cities. Our Internet access is provided in cooperation with iStar Internet.

### **WWW Site Development**

Web Networks provides a complete WWW site development service including page design, graphics, forms, CGI scripting, database and search services, secure connections, site statistics, domain name registration, hosting services, site maintenance and more. Whether your project is big or small, Web Networks will help you make an impact on the WWW.

### **Building Your Online Workplace**

We understand that the basis for action is solid communication. It takes many people to make an organization work: staff, management, board, volunteers and funders.... and all of them need to be connected to get things done. For 10 years, we've specialized in helping organizations work effectively by offering a range of tools and services to save you money and make your work more efficient. Web Networks' unique private conferences are selective-access work areas set up and defined by you. It's like having a secure newsgroup just for your organization. Your board of directors can hold online meetings or discussions on critical issues. Your fundraising team can share ideas about strategy and maintain momentum across the country. And your staff can plan who's bringing what to the office Christmas party.

Best of all, you can keep the discussion on hand for reference for as long as you want. Experience this transparent, participatory way to keep everyone in the communications loop.

## **Training and Capacity Building**

Training is the key ingredient for any online strategy. Web Networks provides seminars and hands-on training geared to ensuring groups have the foundation on which to build their Internet strategies. From basic Internet navigation, through online collaboration and to more advanced WWW site maintenance training, Web Networks can help you build your organization's capacity.

### **Seminars**

Feeling comfortable in the online world is critical to your organization's Internet success. We use plain language and hands-on participatory learning methods sensitive to the needs of voluntary organizations.

Web Networks seminars are geared to providing groups with the conceptual foundations on which to build their Internet strategies. Beginning with introductory Internet concepts and then moving into strategic applications, Web Networks provides information and resources which are relevant to non-profits and the social change community.

### **Demystifying the Internet**

Discover what the Internet really is and how organizations and individuals are using it! You'll be introduced to the various Internet tools, lingo and etiquette, get advice on equipment and software, learn what to look for in a service provider, and how to find what you're looking for on the Internet without wasting a whole lot of time. All this in plain language and geared for the beginner.

### **Get Your Word Out**

Learn how to make the Internet work for you! We'll show you the ins and outs of online promotion, including tips on designing an effective WWW home page, getting people to your site, running awareness and lobbying campaigns online and getting the services you need at the right price. To fully benefit from this seminar, participants should have a basic understanding of what the Internet is and how it works.

### **Online Advocacy**

We'll show you how to use the Internet as a tool to build political will. Whether your group lobbies politicians or educates the public, circulates petitions or recruits volunteers, we'll help you design an online campaign that works. This session will explain who is online, how to mobilize people into action, how to position your home page to increase the number of visitors to your site and tips on how to implement your strategy.

### **Online Fundraising**

Within a few years online fundraising will become as standard as a direct mail campaign. This seminar explores the variety of ways that the Internet can expand your

donor base, increase your membership and expose your organization to a larger audience. Using a variety of Internet tools, this session will provide a foundation for incorporating the Internet into your overall fundraising strategy.

### **Training**

Web Networks offers a wide range of hands-on training sessions tailored to the needs of the organization, and the individual participants. Sessions are limited to four participants and can be held in your office.

#### **Basic Internet Skills**

In this training session, you will learn the basics of e-mail, the World Wide Web, Usenet newsgroups, telnet, FTP, online search engines and other techniques for navigating the Internet. You will also be provided with an introduction to the Web Networks community conferences and other Web Networks services.

#### **Community Intranetworking: Online Group Collaboration**

You'll get a guided tour through Web Networks tools: e-mail, community and private conferences, the WWW and the Community Resource Centre. We'll show you how to hold online meetings, collaborate on documents and projects, reach agreement on issues and facilitate action towards your goals.

#### **Facilitators Training: Building Your Online Community**

Building an effective online workspace takes more than just creating a conference. It requires leadership, encouragement and facilitation. We work with key individuals in your community to help them develop the necessary skills to hold effective online meetings, catalyse online action, produce collaborative documents and facilitate participation to ensure that all of the members of the group are fully engaged.

#### **Train-the-Trainer**

Become a certified Web Networks trainer! Web Networks trainers teach more than just technology — they provide access to the tools that can make a difference in the world. Learn to guide participants through a comprehensive tour of Internet tools from getting online to advocacy and facilitation training. This training is designed for individuals interested in delivering training and organizations wishing to build their internal capacity.

*We are happy to tailor our sessions for specific audiences: women-only, members of a particular community or coalition, executive directors and senior management, for example.*

## **APPENDIX**

### **C**

## **Web Networks: An Organizational Overview**

Web Networks is a nonprofit organization dedicated to providing the highest quality, most cost effective electronic communications tools to the social change community and nonprofit organizations across Canada. Web Networks strives to create a just work environment for its employees and to promote fair and sustainable economic models in the broader community.

### **Mission Statement**

Web Networks aims to contribute to building a self-reliant online community based on nonprofit enterprise, cooperation and mutual aid which can support, maintain and defend principles of social responsibility, ecology and economic justice. To these ends, Web Networks provides appropriate and innovative communication technology and resources. Web Networks also seeks to foster healthy and productive work environments in nonprofit organizations.

### **A Brief History of Web Networks**

Formerly operated by NirvCentre, Web Networks has provided online services to nonprofit groups and individuals involved in environment, human rights, peace, social justice and international development since 1987. Over the years it has worked nationally and internationally to provide online tools for key social change events hosted by the United Nations and a range of national organizations. In 1996, NirvCentre and Web became one with the official creation of 'Web Networks'. This name change was accompanied by technical partnerships with Open Text Corporation and iStar Internet.

### **A Unionized Work Environment**

As a part of its commitment to fair work practices, Web Networks operates as a unionized shop. Staff are actively involved with day to day decision making and strategic direction within the organization. Web Networks staff are members of the Communications, Energy and Paperworkers Union of Canada.

## **APPENDIX**

### **B**

# Appendix D

# **Association for Progressive Communications**

Global Computer Communications for Environment,  
Human Rights, Development & Peace

## **What is APC?**

### **A Global Computer Network for Change**

The Association for Progressive Communications (APC) is a network of networks whose mission is to empower and support organizations, social movements, and individuals through the use of information and communication technologies to build strategic communities and initiatives for the purpose of making meaningful contributions to human development, environmental preservation, social justice, participatory democracies and sustainable societies.

Composed of a consortium of 25 international member networks, APC offers vital links of communication to over 50,000 NGOs, activists, educators, policy-makers, and community leaders in 133 countries.

APC member networks main purpose is to develop and maintain the informational system that allows for geographically dispersed groups who are working for social and environmental change to coordinate activities on-line at a much cheaper rate than can be done by fax, telephone, or for-profit computer networks. APC is committed to making these tools available to people from all regions in the world.

## **Bridging the Information Gap**

### **Between North and South**

APC works to reduce the gap between the information-poor and the information-rich. Towards this end, Southern and Northern members of APC regularly exchange information and technical expertise. As well, APC members collaborate with over forty partner systems in Southern countries, increasing information flow between South and South. Many of these partner networks provide the only e-mail access for NGOs in their countries.

creasing access to networking technologies and information sources for women and women's NGOs.

APC's Womens Networking Support Program provided the Internet connection and Electronic Information Services at the United Nations Fourth World Conference on Women and the NGO Forum on Women, in Beijing, China, September 1995. The APC team was composed of 40 women from 24 countries, who offered user support and training in 18 languages.

## **What Makes APC Unique?**

The APC Networks are distinguished by the depth and quality of their information resources, by the global reach of their communication services, and by the diversity of their membership. APC developed from a dedicated grass-roots constituency and has become a true global community.

APC hosts information in several languages, including Spanish, Portuguese, Estonian, Serbian, Macedonian, Bosnian, Croatian, Slovenian, Russian, English, Swedish, Danish, Flemish, Euskara, Catalonian, Dutch, German, Polish, French and Esperanto among others. In addition, APC provides extensive user support and training to help people access the system and use it easily and efficiently.

## **APC Programs**

APC carries out its work through a number of specific programs that address the needs of the constituencies APC serves.

### **Supporting Electronic Networks**

To strengthen the capacities of existing and emerging electronic networks to build strategic communities.

### **Promoting Strategic Uses of Information and Communication Technologies (ICTs)**

To empower user communities to take full advantage of ICTs to accomplish their collective objectives.

### **Developing Information and Communication Content and Tools**

To develop new products, information resources and applications to support the development of strategic communities.

### **Lobbying and Advocacy**

To ensure the development of policy environments that guarantee open and equitable ICT and information access for civil society and in particular for strategic communities closely associated with social change objectives.

### **Women's Program**

This program was founded in 1993 and has played a major role in supporting the access to and use of women and women's organizations to the new technologies in order to strengthen women's local, regional and international work.

## **APPENDIX D**

## **APC Africa Capacity Building Program**

APC Africa is a broad spectrum of people/groups involved in electronic networking in Africa, working with civil society and information providers, offering access to electronic technologies, relevant information, technical expertise and human linkages, in order to empower, raise awareness, build skills, forge partnerships and advocate. The main objective of this program is to continue doing this in a more structured manner and better coordinate the networking initiatives in the region.

### **How are People Using APC**

On a “typical day” users of the APC networks use the system in a variety of important ways:

- At a meeting in Australia, the trustees of an organization need a 12-page report to proceed with an agenda item, but the only copy is in England. Within half an hour they have the entire report in hand for less than the cost of postage.
- The editor of a newsletter in Brazil receives article submissions on-line, eliminating the need to key in the desired articles herself.
- A solidarity group in England updates itself on events of the last few days in Central America (received in both English and Spanish) and sends a message to the project it supports in El Salvador.

The APC Networks are designed for use by NGOs, other types of not-for-profit citizen-based organizations, and individuals who communicate with NGOs. These include United Nations agencies, research organizations, government departments, educational institutions, multi-stakeholder groups and activists.

People use APC as an information and organizing tool for a wide range of issues. These include:

Peace	Labour Movement
Public Health	Human Rights
Environmental Issues	Population
Development Education	Social & Economic Justice
Nonviolence	Poverty
Women's Empowerment	Indigenous Rights
Demilitarization	

## **APC and the United Nations**

APC has been instrumental in forging communication links between NGOs and the United Nations.

In 1992, APC served as the primary provider of telecommunications for NGOs and UN delegates during the preparatory process and on-site at the Earth Summit (UNCED) in Rio de Janeiro, Brazil. This effort established computer networking as

a powerful mechanism for better integrating NGOs into all aspects of United Nations conferences from preparation to follow-up. To provide continued access to UN events, APC has directed similar initiatives at the:

- 1993 United Nations Conference on Human Rights in Vienna, Austria
- 1994 International Conference on Population and Development in Cairo, Egypt
- 1995 World Summit on Social Development in Copenhagen, Denmark
- 1995 Climate Conference of the Parties to the Climate Convention in Berlin, Germany
- 1995 Fourth World Conference on Women in Beijing, China

Throughout the year, APC works closely with several United Nations agencies to make them and their information more accessible to NGOs. As well, APC is an NGO in Consultative Status (Category 1) with the Economic and Social Council of the United Nations.

## **Dial Locally, Act Globally**

### **APC and the Internet**

APC provides full connectivity to the Internet. All APC member networks provide users with an Internet e-mail address. APC users can communicate with any of the over 40 million people who have an Internet e-mail address; as well as with most commercial, academic and other networks.

Many APC networks provide navigational tools to help their users access information that is otherwise difficult to locate on the Internet. For example, through the Telnet command, users can access any public computer on the Internet, including universities, libraries, research institutions, and public databases. Several APC networks make information publicly available on the Internet via the World Wide Web (WWW) and via Gopher, a user-friendly, text-based, menu-driven information search tool. As well, several APC networks offer SLIP and PPP access which allows the use of a graphic interface to Internet services.

### **APC Networking Tools**

- World Wide Web
- Electronic Mail (e-mail)
- Electronic Conferences, both private and public
- Databases
- Fax and Telex
- Internet Navigation Tools: Gopher, Telnet, FTP, WAIS
- News and Information Services
- International User Directory

## **APPENDIX D**

### **A Community Without Borders**

NGOs and activists worldwide use APC Networks for both their internal organizational communications as well as their public organizing efforts. In addition, many progressive news services distribute their publications electronically on the APC Networks.

If you or your organization is working for social or environmental change, APC is the community to join. The APC Networks constitute the largest international on-line forum working toward progressive goals. To join APC's community-without-borders, contact the member network in your region. Please see address list below.

### **How Much Does it Cost?**

Rates vary according to the nature of the organization (e.g., NGO, For-Profit, Government, Individual, etc.) Monthly costs average US\$10-30. APC members agree to keep prices as low as possible so as to be affordable to NGOs, including special group rates in some cases.

Most APC member networks are Internet Service Providers in their countries.

Subscribing to any one of the member networks gives you access to all the materials, information and many services made available by all other APC members.

For current information on any APC member pricing structure, please contact them directly through the addresses provided below.

### **APC Secretariat**

APC International Secretariat  
Avenida Presidente Vargas 3131, Rm 406  
20210-030 Rio de Janeiro  
BRASIL  
Tel: +55 (21) 515-0500  
Fax: +55 (21) 515-0505

APC North American Regional Office  
Presidio Building 1012, First Floor  
Torney Avenue  
PO Box 29904  
San Francisco, CA 94129-0904 USA  
Tel: +1(415)561-6100 ext. 120  
Fax: +1(415)561-6101  
E-mail: [apcadmin@apc.org](mailto:apcadmin@apc.org)  
WWW: <http://www.apc.org/>

## **APPENDIX**

### **D**

## **APC Networks Address List**

### **AlterNex**

Avenida Presidente Vargas 3131, room 406  
20210-030 Rio de Janeiro  
**BRAZIL**  
Tel: +55 (0) 21 515-0500  
Fax: +55 (0) 21 515-0505  
E-mail: support@ax.apc.org  
WWW: <http://www.ax.apc.org>

### **Antenna**

Box 1513  
NL-6501 BM Nijmegen  
**NETHERLANDS**  
Tel: +31 (24) 323 5372  
Fax: +31 (24) 323 6798  
E-mail: support@antenna.nl  
WWW: <http://antenna.apc.org>

### **Chasque**

Casilla Correo 1539  
Montevideo 11000  
**URUGUAY**  
Tel: +598 (2) 496-192  
Fax: +598 (2) 419-222  
E-mail: apoyo@chasque.apc.org  
WWW: <http://www.chasque.apc.org/>

### **Colnodo**

Avenida 39 No. 14-75  
Santafe de Bogota, DF  
**COLOMBIA**  
Tel: 57-1-3381277  
Fax: 57-1-2871941  
E-mail: soporte@colnodo.apc.org  
WWW: <http://www.colnodo.apc.org>

### **ComLink**

Im Moore 26, D-30167  
Hannover, GERMANY  
Tel: +49-511-161 78 11  
Fax: +49-511-165 26 11  
E-Mail: support@oln.comlink.apc.org  
WWW: <http://www.comlink.apc.org>

### **Econnect**

Ceskomalinska 23  
160 00, Praha 6  
**CZECH REPUBLIC**  
Tel: +42-2-3118170  
Fax: +420-2-24311780  
E-mail: support@ecn.cz  
WWW: <http://www.ecn.cz/>

### **Enda-Dakar**

PO Box 3370  
Dakar  
**SENEGAL**  
Tel: +221 22 3194  
Fax: +221 23 5157  
E-mail: moussaf@enda.sn  
WWW: <http://www.enda.sn/>

### **GlasNet**

Gazetny Pereulok, 9, stroenie 2, 3rd floor  
103009 Moscow, RUSSIA  
Tel: +7 (095) 291-4343  
Fax: +7 (095) 229-0043  
E-mail: support@glas.apc.org  
WWW: <http://www.glas.apc.org>

### **GLUK - GlasNet-Ukraine**

14b Metrologicheskaya str.  
Kiev, 252143 UKRAINE  
Tel: +7 (044) 266 9481  
Fax: +7 (044) 266 9475  
E-mail: support@gluk.apc.org  
WWW: <http://www.gluk.apc.org>

### **GreenNet**

4th Floor  
74-77 White Lion Street  
London N1 9PF  
**ENGLAND**  
Tel: +44/171 713 1941  
Fax: +44/171 837 5551  
E-mail: support@gn.apc.org  
WWW: <http://www.gn.apc.org>

## **APPENDIX**

### **D**

<b>GreenSpider</b> 2600 Vac, Ilona u. 3. <b>HUNGARY</b> Tel: +36 27 305769 Fax: +36 27 304483 E-mail: support@zpok.hu WWW: <a href="http://www.zpok.hu">http://www.zpok.hu</a>	E-mail: support@knooppunt.be WWW: <a href="http://www.knooppunt.be/">http://www.knooppunt.be/</a>
<b>Inform</b> Wesselsgade 4 P.O. Box 25 DK-2200 Copenhagen N <b>DENMARK</b> Tel: +45 31 35 3880 Fax: +45 31 35 4332 E-mail: support@inform-bbs.dk WWW: <a href="http://www.inform.dk/">http://www.inform.dk/</a>	<b>LaNeta</b> Alberto Zamora #126 Col. del Carmen, Coyoacan 04100 Mexico, D.F. <b>MEXICO</b> Tel. (52+5) 554 19 80 Fax (52+5) 554 31 59 E-mail: soporte@laneta.apc.org WWW: <a href="http://www.laneta.apc.org">http://www.laneta.apc.org</a>
<b>INTERCOM-Nodo Ecuanex</b> Direccion: Av. Orellana 1791 y Av. 10 de Agosto. Edificio Francisco de Orellana, 6to piso. Casilla 17-12-56, Quito <b>ECUADOR</b> Tel: +593 2 523527 / 553553 Fax: +593 2 227014 E-mail: intercom@ecuanex.apc.org WWW: <a href="http://www.ecuanex.apc.org/">http://www.ecuanex.apc.org/</a>	<b>Nicarao</b> Apartado 3516, Iglesia El Carmen 1 cuadra al Norte, 1/2 cuadra al Oeste. Managua, Nicaragua Tel: +(505)-2-225217,225137, 2682362 Fax: +(505)-2-2681565 E-mail: ayuda@nicarao.apc.org.ni WWW : <a href="http://nicarao.apc.org.ni">http://nicarao.apc.org.ni</a>
<b>IPANEX</b> Edifici PL Jordi Girona Salgado, 31 E-08071 Barcelona <b>SPAIN</b> Tel: +34-3-4015664 E-mail: suport@pangea.org WWW: <a href="http://www.pangea.org">http://www.pangea.org</a>	<b>NordNet</b> Nordnet APC Box 17510 118 91 STOCKHOLM Street address: Hornsgatan 54 Tel: + 46 - 8 - 714 50 61 Fax: +46 - 8 - 714 50 64 E-mail: support@nn.apc.org WWW: <a href="http://www.nn.apc.org">http://www.nn.apc.org</a>
<b>KnoopPunt vzw</b> Snoekstraat 52, 9000 Gent <b>BELGIUM</b> Tel. +32 9-233 81 55 Fax +32 9-233 73 43	<b>PeaceNet/EcoNet/ConflictNet/ LaborNet/WomensNet</b> Institute for Global Communications Presidio Building 1012, First Floor Torney Avenue PO Box 29904 San Francisco, CA 94129-0904 USA Voice : +1 415-561-6100 Fax: +1 415-561-6101 E-mail: igc-info@igc.apc.org WWW: <a href="http://www.igc.org">http://www.igc.org</a>

**Pegasus Networks**  
Postal: PO Box 3220, South Brisbane  
QLD 4101  
Street: Oxley House, 25 Donkin  
Street, West End  
Brisbane, QLD 4101  
**AUSTRALIA**  
Tel: +61 7 3259 6259  
Fax: +61 7 3255 0555  
E-mail: pegasus@peg.apc.org  
WWW: <http://www.peg.apc.org>

**PlaNet**  
78 Straven Rd  
Christchurch, Canterbury 8001  
**NEW ZEALAND**  
Tel: +64 3 343-2633  
E-mail: support@planet.apc.org  
WWW: <http://www.chch.planet.org.nz>

**Retina & Zamir Transnational Net (ZTN)**  
RETINA Ljubljana  
Metelkova 6  
1000 Ljubljana  
Tel. 00-386-61-1323378  
Fax. 00-386-61-212989  
E-mail: Retina@KUD-FPSI  
WWW: <http://www.kud-fp.si/retina/>

**ZTN systems:**  
ZAMIR-BG is in Belgrade at  
tel: +381 11 632 566  
Voice +381 11 635 813 / 626 623  
Email: support@ZAMIR-BG.ztn.apc.org  
ZAMIR-LJ is in Ljubljana at  
tel: +386 61 132 3378  
Voice: +386 61 212989  
Email: support@ZAMIR-LJ.ztn.apc.org  
ZANA-PK is in Pakrac at  
tel: +385 34 412475 / 411594  
Voice : +385 34 411881  
Email: support@ZAMIR-PK.ztn.apc.org  
ZANA-PR is in Pristina at  
tel: +381 38 31276

Voice support at  
tel: +381 38 31031 / 31036  
Email: support@ZANA-PR.ztn.apc.org  
ZAMIR-SA is in Sarajevo at  
tel: +387 71 444-200  
Voice support at tel: +387 71 444-337  
Email: support@ZAMIR-SA.ztn.apc.org  
ZAMIR-TZ is in Tuzla at  
tel: +387 75 239-146  
Voice support at tel: +387 75 239-147  
Email: support@ZAMIR-TZ.ztn.apc.org  
ZAMIR-ZG is in Zagreb at tel: +385 1  
423 044/271 927/274 188  
Voice support at tel: 43851 426 849  
Email: support@ZAMIR-ZG.ztn.apc.org

**SANGONeT**  
P. O. Box 31  
13th floor Longsbank Building  
187 Bree Street  
Johannesburg 2000  
**SOUTH AFRICA**  
Tel: +27 (11) 838-6944  
Fax: +27 (11) 492 1058  
E-mail: support@wn.apc.org  
WWW: <http://www.sn.apc.org/>

**Wamani**  
Talcahuano 325-3F  
1013 Buenos Aires, Argentina  
Tel: +54 (1) 382-6842  
Tel/Fax: +54 (1) 382-9342  
E-mail: apoyo@wamani.apc.org

**Web Networks**  
401 Richmond Street West, Suite 103  
Toronto, Ontario M5V 3A8  
**CANADA**  
Tel: +1 (416) 596-0212  
Fax: +1 (416) 596-1374  
E-mail: outreach@web.net  
WWW: <http://www.web.net>

## APPENDIX D

## **Which Member Network to Contact**

### **Africa**

Western Africa: ENDA-Dakar  
Southern Africa: SANGONeT  
East, West and North Africa:  
GreenNet

### **Asia/Pacific**

Australia: Pegasus  
China: PeaceNet/EcoNet  
Japan: PeaceNet/EcoNet  
Middle East: GreenNet  
Southeast Asia: Pegasus  
New Zealand: PlaNet  
Pacific Islands: Pegasus  
Other Asian countries: GreenNet

### **Central America**

Cuba: Web Networks  
Nicaragua: Nicarao  
Panama: Nicarao  
Other Central American countries:  
Nicarao

### **Central and Eastern Europe**

Europe Baltic States: NordNet  
Bosnia/Croatia/ex-Yugoslavia: Zamir  
Transnational Net  
Belgium: Knooppunt  
Denmark: Inform  
German-speaking regions: ComLink  
Great Britain: GreenNet  
Netherlands: Antenna  
Nordic Regions: NordNet  
Russia: GlasNet  
Slovenija: Histria  
Czech Republic: Econnect  
Hungary: GreenSpider  
Turkey: ComLink  
Ukraine: GLUK  
Other CIS countries: GlasNet  
Other European countries: GreenNet

### **North America**

Canada: Web Networks  
Mexico: LaNeta  
United States: PeaceNet/EcoNet

### **South America**

Argentina: Wamani  
Brazil: AlterNex  
Colombia: ColNodo  
Ecuador: EcuAnex  
Paraguay: Chasque  
Uruguay: Chasque  
Other South American countries:  
AlterNex

### **APC Partner Networks**

Angola (EBONet)  
Austria (Alpin, DEMUT, LINK-  
ATU, SIGNAL)

Cambodia (Pactok-CCCNet; People's  
Forum)

Cameroon (Camfido)

Chile (Reduc)

Ethiopia (PADIS)

Fiji (Pactok-PSDN)

France (GlobeNet)

Ghana (FOEGhana, UCC, UG,  
UST)

India (IndiaLink Delhi, Bombay,  
others)

Italy (INES)

Japan (JCA)

Jordan (MTC)

Kazakhstan (KazNet)

Kenya (ELCI, ThornTree)

Malawi (Unima, Epsilon&Omega)

Malaysia (Pactok)

Morocco (ENDAMAG)

Nigeria (Hisen-Jos)

Palestine (Baraka)

Papua New Guinea (Pactok)

Philippines (PHIL-Email Centre)

Romania (StrawberryNet)

Sierra Leone (University of Sierra  
Leone)

Solomon Islands (Pactok)  
Sri Lanka (LANKA)  
Tanzania (COSTECH, MARIE)  
Tajikistan (TAJnet)  
Turkey (INFO-IST)  
Uganda (MUKLA)  
Uzbekistan (SilkNet)  
Vanuatu (Pactok)  
Venezuela (RedULA - Universidad de  
los Andes)  
Western Samoa (Pactok)  
Zambia (ZamNet)  
Zimbabwe (Mango)

All APC Networks contact information  
correct as of June 1997.

**APPENDIX**  
**D**

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# Appendix E

## Glossary of Terms

**Archive:** The record created and stored of all the messages posted either in a conference or to a mailing list.

**Association for Progressive Communications (APC):** Formed in 1990, APC is a worldwide association of member networks dedicated to providing low-cost computer communication services for individuals and organizations working for environmental sustainability, universal human rights, and social and economic justice. Web Networks is the Canadian member of APC.

**ASCII:** American Standard Code for Information Interchange. The form in which text characters are handled by most computer systems and networks. ASCII text has no special characters for formatting such as underlined or bold characters, font changes, etc. Also known as plain text, DOS text or text-only.

**Asynchronous:** Not synchronous, or not happening at the same time. A meeting using a conference telephone call is synchronous or "real time" a meeting happening over two weeks online is asynchronous.

**Attachment:** See File Attachment.

**Binary file:** A binary file is one that contains special codes as well as or instead of text. It can be a piece of software, a spreadsheet, a graphic, or a specially formatted word processor document. Binary files cannot be

displayed on conferences or mailing lists, but can be sent as attachments, and downloaded for use with appropriate applications on your computer. Binary files are usually exchanged by e-mail only, as file attachments.

**Browser:** A program you run on your computer to look at and use various kinds of Internet resources. Popular browsers include Netscape, Mosaic, and Internet Explorer.

**Co-Facilitation:** see Facilitation.

**Communications software:** The program that tells your computer how to talk to your modem and to other computers, e.g., the Web Networks Internet Tool Kit.

**Community Resource Centre guide:** A guide available from Web Networks on how to use all the different features available in the online Community Resource Centre. Each Web Networks conference access subscriber receives one of these guides.

**Conferences:** Sometimes called an electronic bulletin board or a newsgroup, a conference is a collection of messages related to a particular issue. For example, "labr.canada" is a conference for news, analysis and discussion of labour issues related to Canada, Canadian workers, free trade and NAFTA. Conferences can also be used to post information such as news services, newsletters and statistics. Web Networks offers about 1200

community conferences that all users have access to. Private conferences are also available, to limit access to a particular group of people. Conferences are a tool exclusive to APC Networks users.

**Digest:** A summary e-mail message which is automatically created by mailing list software that compiles a group of individual messages into a single posting. Digests can be set to not exceed a certain size. Digests can also be set to go out at different intervals (daily, weekly), usually based on how busy the mailing list is.

**Disintermediation:** The process of removing an intermediary (person or structure) within a group of people working together.

**E-mail:** Abbreviation of electronic mail. A way to allow messages and documents to be exchanged between individuals or groups of individuals on any computer network, including the Internet. E-mail is similar to an ordinary letter: — you supply the address of the recipient(s) and the text of the message. It is different in that delivery takes place in minutes or hours rather than days. A sample e-mail address is *outreach@web.net*

**E-mail list:** see **Mailing List**

**Eudora:** A popular, point-and-click software program which is used to create, send and receive e-mail. Available in two versions: Eudora Lite and Eudora Pro.

**Facilitator:** The user, or users, responsible for managing a particular online conference or mailing list is called the

facilitator. Their job can involve determining access, animating discussion, and providing technical or other support to a group of people working together online.

**Facilitation:** The art of animating an online discussion group or workspace with a group of people.

**File attachment:** One way to send non-text files to people is to send them in their original form as an attachment to your e-mail message (e.g., Word Perfect 6.1, PageMaker 6, etc. files). The receiver will not see the file attachment in the message, it will be saved to the folder or directory designated on their computer for incoming attachments. You should make sure the person you're sending a file attachment to has the same software yours is prepared in, otherwise they will have difficulty opening and/or using the file.

**Flame:** Originally, flame meant to carry forth in a passionate manner in the spirit of honourable debate. Flames most often involved the use of flowery language and flaming well was an art form. More recently flame has come to refer to any kind of derogatory comment by an Internet user.

**Flame war:** When an online discussion degenerates into a series of personal attacks against the debaters, rather than discussion of their positions. A heated exchange.

**Free Agent:** A point-and-click software program for reading conferences and newsgroups. Free Agent has offline capabilities which means you

can download all the new messages in the groups you are following and then disconnect. Offline you read and respond to the messages posted and the next time you dial in, your messages will be posted to the newsgroup.

**Graphical access:** A Windows- or Macintosh-like environment that supports images and point-and-click navigation online.

**“info” file:** The message each subscriber receives when they sign up to a mailing list. Tells subscribers the purpose of a mailing list is and how to manage their subscription, e.g., how to unsubscribe or set the messages to digest. Can also include posting guidelines and ground rules for participation in the list.

**Internet:** The worldwide “network of networks” that are connected to each other. Originally used for military and other research at universities.

**Internet Explorer:** Microsoft’s software program used to access the World Wide Web. Also known as a browser. Similar to Netscape.

**Intranet:** A private network internal to a company or organization that uses the same kinds of software that you would find on the public Internet. Access is usually restricted.

**IRC:** Internet Relay Chat. A multi-user live (synchronous) message exchange facility. There are a number of major IRC servers around the world which are linked to each other that users log into to use IRC. Anyone can create a channel and anything that anyone types in a given channel is seen by all others in the channel.

Private channels are created and used for multi-person conference calls.

**ISP:** Internet Service Provider. A company or institution that provides some form of access to the Internet, usually for money.

**Listowner:** The person or people responsible for the smooth operation of a mailing list. Responsibilities include responding to technical requests and dealing with error messages. In some cases the list-owner is also the person facilitating the discussion.

**Listserver:** The machine that a mailing list runs from, usually located at your ISP.

**Login:** The process of accessing a Network. Also related to the user’s identification on the local network. Usually, on e-mail addresses, the login is what comes before the @ character.

**Lurker:** A person who is subscribed to a mailing list or reads a conference but who may not post messages, preferring to read and watch what is happening.

**Lurking:** The art of watching what is happening in an online space.

**Mailing List:** A system for automatically distributing messages by e-mail to a subscribed group of users. People with many different kinds of e-mail access can participate in discussions together. Listproc, Listserv and Majordomo are the most commonly used mailing list software programs.

**Modem:** (Modulator, DEModulator) A device that you connect to your computer and to a phone line, that allows the computer to talk to other computers through the phone system. Your modem can be installed internally or attached externally by a cable.

**Moderated:** A setting for a mailing list or conference which requires each message to be reviewed and approved by someone prior to being sent to the group. It is usual to develop an editorial policy for moderated spaces to define the type of information which will be approved for circulation.

**Network:** Any time you connect two or more computers together so that they can share resources, you have a computer network.

**Newbie:** An affectionate term used to describe a new user on the Internet.

**Newsgroups:** The name for public discussion groups on the Internet.

**Newsreader:** Software tool to read newsgroups (or “conferences” as they are known on Web Networks). You can use the one that comes with your WWW browser, or you may use a separate tool, e.g., Free Agent or Lynx (text-only). A newsreader allows you to look at an index of messages in a newsgroup, choose which ones you want to read, and read them. It also allows you to “subscribe” to conferences you want to see regularly.

**Online:** Your computer is online when it is talking to another computer (for example, your ISP) through

your modem. You are paying to use a computer network when you are online.

**Offline:** Not actively connected to a computer or computer network. For example, you might work on a file offline and log on (go online) to a computer network to send it.

**Permissions:** Technical facilitator settings you use for adding and removing user access to a private conference. See Appendix A: Managing Access to Your Conference.

**Permissions List:** The list of names (user IDs) that have access to a private conference.

**Prompt:** The place on your screen where the cursor is flashing, waiting for you to do something. For example, when adding a new user to your private conference, you need to type in at the Option: prompt.

**Quote:** A way of repeating the relevant parts of a message when replying to it, in conferences or e-mail. Parts of the message are quoted by placing a “>” symbol at the start of each line in the quoted section. (Most mail programs do this automatically.) Quoted text is usually used sparingly to make a point or build on an idea.

**Response:** A reply to a conference topic or an e-mail message.

**Restricted:** This refers to the degree of access individuals have in subscribing to a mailing list or conference. A restricted conference or mailing list requires the subscriber to request permission to join. The user is usually

approved or given permission by the facilitator or list-owner.

**Smiley:** A symbol, when viewed sideways, used to indicate the use of (or attempted use of!) humour. ;-)

**Support:** See User Support.

**Spam (or Spamming):** Sending unsolicited messages to a large number of people. For example, sending a sales pitch to a mailing list concerned with community health promotion. The term probably comes from a famous Monty Python skit which featured the word spam repeated over and over. (Spam is a registered trademark of Hormel Corporation, for its processed meat product.) If your mailing list is moderated, you can protect it from being “spammed”.

**Synchronous:** Activities existing or occurring at the same time, such as a telephone conference call or face-to-face meeting.

**Techie:** A person responsible for the technical operation of a computer network.

**“test” conference:** The place in the Web Networks conference system where you can try out new things before you do them in your conference.

**Text-only access:** An operating environment that uses characters (as opposed to icons and graphics) to navigate the network or Internet. People with old computers, and those connecting to FreeNets are limited to text-only access.

**Text-only document:** see ASCII.

**Telnet:** A terminal-emulation protocol that allows Internet users to remotely log onto a host computer using a Telnet program. Terminal-emulation protocol refers to the method your computer uses to interface with the remote location.

**Topic:** The initial posting on a specific subject, within a conference or mailing list. One topic can have several related responses. A collection of responses to a topic is called a “thread.”

**Transparent:** Easy to see the source and understand the process underway within a group. A characteristic of working together online.

**URL:** (Universal Resource Locator) The standard way to give the address of any resource on the Internet that is part of the World Wide Web (WWW). A URL looks like this: <http://www.web.net> or <telnet://well.sf.ca.us> or <news://new.newusers.questions>

**Usenet:** A world-wide system of public discussion groups, with messages passed among hundreds of thousands of computers. Usenet is completely decentralized, with over 10,000 discussion areas, called newsgroups. Usenet groups can be moderated or unmoderated.

**User Support:** The staff at Web Networks or your ISP who can help you use the network.

**Web Networks:** The Canadian member of the Association for Pro-

gressive Communications (see APC).

**Web for New Users guide:** Available from Web Networks when you sign up. An easy to use introductory guide to Web Networks, offering step-by-step instructions on how to use common network tools.

**World Wide Web (WWW):** Not to be confused with Web Networks. The WWW is an easy-to-use standard format for retrieving and publishing information. WWW sites can include text, sound, image, voice and moving pictures.

**Workspace:** Any defined space a group configures on the Internet or an electronic network in which to work together.

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For more terms related to the use of online resources you can try:

[http://newportnet.com/info/  
inetdefs.htm](http://newportnet.com/info/inetdefs.htm)

<http://www.bsi.com.br/bsi/gloss.html>

We also recommend this book for new users:

[Canadian Internet New User's Handbook](#), by Jim Carroll and Rick Broadhead, Prentice Hall, 1996.

## **About the Authors**

**Liz Rykert** is a community organizer and facilitator with a background in Social Work. She began working online (and with computers!) in 1994 when she was asked to add an online workspace to large innercity child health project in downtown Toronto. Since that time she has supported many people in using the Internet successfully to work together online. Her most recent project is a volunteer effort to restore local democracy in Toronto, where she has been responsible for the electronic strategies.

**Maureen James** is an Internet communications and project consultant. Since 1988, she has helped groups and individuals in the non-profit and social change community to make effective use of online tools and workspaces. She works closely with Web Networks and the Association for Progressive Communications, particularly on women's networking. Currently she is facilitating the Gender and Information Technology discussion (gk97-gender) for the June 1997 Global Knowledge conference taking place in Toronto, Canada.

*"In plain English, with a grin and a helping hand, here's how to build your working community online. This terrific book is tailor-made for anyone who wants to get a group together to make things happen in cyberspace."*

Michele Landsberg  
Toronto Star Columnist and Author

The Internet, and now intranets, are creating exciting new ways to work together.

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- choose the best online collaboration tools
- assess your "true" technical needs for working together
- identify the facilitators in your group

We also give you steps and guidelines for:

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- creating a productive workspace
- dealing with conflict
- holding online meetings
- drafting joint documents
- keeping your workspace active

... and much more!

Whether you are a beginner or a seasoned expert, *Working Together Online* provides useful information to help your group to make better use of the Internet. Technology on its own won't make online collaboration happen. It's people that make the difference. This is the first book of its kind to show how groups can collaborate to bring shared online spaces to life and make them work.

Authors Liz Rykert and Maureen James put years of online facilitation experience together in this comprehensive resource for effective use of online workspaces.

Web Networks, a Canadian, non-profit, online service provider has been building online communities for ten years. *Working Together Online* continues a commitment to help groups take advantage of electronic workspaces. From providing basic connectivity services to building intranets and online communities, Web Networks is working to make electronic networking more accessible and effective for people working to make a difference in the world.



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