Tips and Tools for Developing and Delivering an Online Workshop

Report on the Online Workshop on Board – Staff Relations

Report written by Joanne Kaattari
With input from OMAFRA staff
March 1999

Acknowledgements

Table of contents

COMMUNITY LITERACY OF ONTARIO

80 Bradford Street, Suite 508 • Barrie, Ontario, L4N 6S7
705-733-2312 (t) • 705-733-6197 (f)

Tips and Tools for Developing and Delivering an Online Workshop

Report on the Online Workshop on Board – Staff Relations

1. Overview of the online workshop

Community Literacy of Ontario (CLO) is a network of volunteer-based literacy agencies in Ontario. The Ontario Ministry of Agriculture, Food and Rural Affairs (OMAFRA) fosters competitive, economically diverse, and prosperous agriculture and food sectors and is the lead ministry to promote economic development and job creation in rural communities.

CLO found that many community literacy agencies had been expressing the need for more training in volunteer management. However, time, cost, and the availability of local training opportunities were major barriers to their accessing such training.

In response to this need for additional training, Community Literacy of Ontario and the Ontario Ministry of Agriculture, Food and Rural Affairs developed and delivered an innovative online workshop on board / staff relations. The workshop was created for the staff, directors, and volunteers of community literacy agencies in Ontario.

Eight course modules were developed for this workshop. Workshop facilitators responded to questions and encouraged a lively online discussion. It was delivered over a two-month period from October 15 – December 15, 1998. A total of 75 people participated. The average time to complete the workshop was eight hours.

Many other key partners were involved with the success of this initiative. The workshop was funded through the financial support of the Ontario Ministry of Education and Training and the National Literacy Secretariat. It was hosted on the electronic conferencing system of AlphaPlus Centre. The National Adult Literacy Database assisted with the online evaluation of the workshop. Our most sincere thanks to you all!

Because online delivery of workshops is so new, CLO and OMAFRA included a strong evaluative component to this workshop. This workshop was extremely successful and we learned a great deal about effective online delivery. This report has been developed in order to share our experience and knowledge about this emerging method of learning: online delivery of workshops. We sincerely hope that you will find it useful.

One very encouraging statistic was that 100% of the 30 people who conducted the anonymous workshop evaluation said that they would take another online workshop!
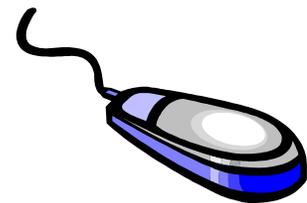
"This workshop was an opportunity to "attend" a workshop even though I am far away in Northern Ontario and isolated from many colleagues"

(Quote from a workshop participant)

2. Workshop Planning and Goals

CLO had determined that it wanted to actively circulate volunteer management information to community literacy agencies online. However, we were not sure of the best method of doing this. The Ontario literacy community (since 1991) and CLO (since 1994) have used the AlphaPlus online electronic conferencing system. We wanted to build on this experience while trying something new. In the 1997-1998 fiscal year, CLO received project funding from the Ministry of Education and Training and the National Literacy Secretariat to provide volunteer management information on AlphaPlus. This funding provided our organization with the opportunity to pilot the online workshop.

CLO conducted a survey of community literacy agencies in May 1998 in order to learn about current volunteer management priorities. Forty people responded to the survey. The survey revealed that the priority issue facing literacy agencies was *"Board – Staff Relations"*.

OMAFRA has a long tradition of assisting rural non-profit organizations with organizational development. Staff provide advice, resources, skills training, and facilitation and management of change in order to enhance rural leaders, organizations, businesses and communities. OMAFRA was looking to develop knowledge and experience in the field of online workshop delivery to their clientele.

CLO and OMAFRA staff met, very appropriately, at the Ontario Voluntary Forum in June 1998 and determined that an effective partnership could be developed between the two organizations. Staff communicated by e-mail, telephone, conference calls and face-to-face meetings to plan, develop and deliver this workshop. The workshop-planning phase was very intensive and time-consuming. Online delivery was (and is!) extremely new, both in general and to the workshop partners.

Workshop roles and responsibilities were set as follows:

CLO's Role:

- ❑ Planning
- ❑ Recruiting participants
- ❑ Marketing the workshop
- ❑ Reviewing the modules and resources to ensure relevance to literacy agencies
- ❑ Online facilitation
- ❑ Liaison with participants, AlphaPlus, and the National Adult Literacy Database
- ❑ Evaluation
- ❑ Writing the report on the successes and challenges of holding an online workshop

OMAFRA's Role:

- ❑ Planning
- ❑ Developing the course modules
- ❑ Developing the discussion questions
- ❑ Developing the resource section of the modules
- ❑ Online facilitation
- ❑ Posting the modules
- ❑ Technical support
- ❑ Evaluation

The Roles of Other Partners:

Many other key partners were involved with the success of this initiative. The workshop was funded through the financial support of the Ontario Ministry of Education and Training and the National Literacy Secretariat. It was hosted on the electronic conferencing system of AlphaPlus Centre. The National Adult Literacy Database developed the online evaluation.

> **Successful planning takes time – CLO and OMAFRA spent 100 hours out of 482 total hours (21%) planning the online workshop.**

CLO and OMAFRA developed the following goals for our online workshop:

1. To develop and deliver a professional development workshop for community literacy agencies on the topic of board / staff relations
2. To increase knowledge among community literacy agencies about board / staff relations
3. To provide community literacy agencies with readily available, concrete, and relevant resources on board / staff relations that they can use both online and within their agency
4. To provide an online forum for participants to discuss issues and share information with each other on the topic of board / staff relations
5. To learn about the successes and challenges of delivering a workshop online
6. To evaluate the effectiveness of online workshop delivery
7. To increase the comfort level of participants with technology and the Internet

Tips and tools for planning an online workshop:

❑ Planning will be key to the success of your workshop. The old saying of *"if you don't know where you are going, how will you know when you get there"* is absolutely true with delivering an online workshop!

❑ Be sure to allocate time for planning. You will need time to develop the "how, who, when and why" of your workshop. The "where" is the easy part: *"to infinity and beyond"* on the World Wide Web!

❑ Develop clear goals for your workshop before proceeding. Your workshop cannot be all things to all people!

❑ Who is your audience? What are their goals? How much time can they devote to your workshop? What is the focus of your workshop? What resources do you have to bring to this workshop (both financial and human)? What are the time frames?

❑ Develop clear roles and responsibilities for everyone involved with the workshop. Developing and delivering an online workshop requires a significant amount of work. Make sure that everyone is clear about his or her roles from the outset.

❑ Develop a clear evaluation plan during the planning phase of your workshop.

3. Participants

The target audience for this workshop was the staff and board members of community literacy agencies in Ontario. However, CLO and OMAFRA made the decision early on to make this an open workshop. We believed that many agencies outside of our target group would be interested in a workshop on board – staff relations.

Participants could simply join our workshop from within the AlphaPlus electronic conferencing system. Participants did not register to specifically join our workshop. However, all users must register to join AlphaPlus. A total of 75 people participated in this workshop. Our initial projection was between 30-40 participants. We tracked who participated in the workshop and for how long.

Total workshop participants = 75

Total participants from Ontario Community literacy agencies = 51 (68%)
- Including: 44 literacy practitioners; 7 volunteer board members
- Agencies from every geographic region of Ontario participated
- 55% of literacy agencies were rural and 45% were urban

Total participants from literacy networks = 13 (17%)
- Including: Regional and Sectoral Literacy Networks and the Movement for Canadian Literacy

Total literacy practitioners from other provinces = 7 (10%)
- Including: Nova Scotia; Northwest Territories; Yukon; Quebec; PEI; British Columbia; and Saskatchewan

Total non-literacy participants = 4 (5%)

The online workshop ran from October 15 – December 15, 1998

- Total participants who took part from October – December 1998 = 45 (60%)
- Total participants who took part from October – November 1998 = 21 (28%)
- Total participants who took part during October only = 9 (12%)

4. Development of the Online Modules
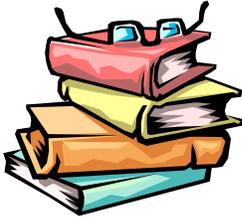
In the planning phase, CLO and OMAFRA determined the following:

- ❏ OMAFRA would take the lead role in developing the workshop modules
- ❏ CLO would review the modules to ensure relevance to the target audience
- ❏ CLO would gather "real life" examples of board / staff relations in community literacy agencies for OMAFRA to incorporate into the course modules
- ❏ Eight course modules would be developed
- ❏ Each OMAFRA staff person would share in the development of the modules
- ❏ Each of these modules would have three parts:
- *a) Content*
- *b) Tools and resources*
- *c) Discussion questions*
- ❏ One OMAFRA staff person would post every module in order to ensure a consistent format
- ❏ The modules should be highly readable (large font, colour, graphics, lots of white space)
- ❏ The modules should be suitable for use both online and offline (within an agency setting)
- ❏ Each section should contain fairly brief messages, so that participants did not have to scroll down endless (and daunting!) screens of information
- ❏ Although the facilitation of the workshop would have a definite end date, we would archive the workshop as a "read only" AlphaPlus conference, so that any one could benefit from the workshop material at a later date

Both CLO and OMAFRA had wanted to post the workshop modules in a highly readable, user-friendly format. We had wanted to use:

- *Larger font (16 point)*
- *Bold, italics and other fonts*
- *Lots of graphics*
- *Colour*

At that particular time, we were not able to incorporate this formatting into the workshop. Incorporating this type of formatting would be a major goal for any future workshops.

> **Developing the course modules was the most time consuming task.**
>
> **CLO and OMAFRA spent 132 hours out of 482 total hours (27%) developing the course modules.**

The course modules consisted of the following:

- Introductory Posting - Tips on How to Get the Most out of the Workshop
- Module One - Introduction to Board / Staff Relationships and Roles
- Module Two - Legal Issues for Organizations
- Module Three - Who Does What in Your Organization?
- Module Four - Policy and Management in Non-Profit Organizations
- Module Five - Models of Board Governance
- Module Six - Deciding Where You Want to Be - Building a Shared Vision
- Module Seven - Pulling It Together and Pulling Together - Effective Communications
- Module Eight - Staff Reporting and Board Monitoring
- Evaluation and Closing Remarks

Length of the workshop and frequency of the postings

CLO and OMAFRA determined that the workshop would run for six weeks and that a module should be posted either once or twice per week.

Given that eight modules were prepared, the workshop time frame was far too short and the frequency of posting the modules was too often. We should have either had fewer modules, or extended the timeframe to at least ten weeks. People tended to feel rushed. Many participants commented that modules should only be posted once per week at the very most.

In the anonymous online evaluation, participants told us that the workshop was (a) too long (4 out of 29 or 14%); (b) too short (12 out of 29 or 41%); and (c) just right (13 out of 29 or 45%).

*"Time must be allowed for readers to read, possibly print, and digest the information and then respond. Posting the modules only once per week would be good".*
(Quote from a workshop participant)

In the evaluation, participants told us that frequency for posting modules was (a) too frequent (17 out of 30 or 57%); (b) not frequent enough (0) and (c) just right (13 out of 30 or 43%).

Content of the Modules
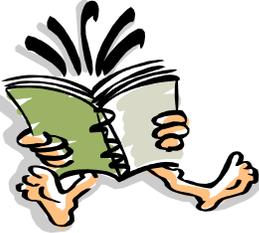
CLO and OMAFRA determined that the contents section must:

- Provide useful and reliable information and resources on "board – staff relations"
- Be formatted for online use
- Be relevant to the literacy field
- Give "real life" examples from literacy
- Be long enough to provide useful information, but not so long that the content would be overwhelming for online users
- Be suitable for downloading for later use

The content developed proved to be very useful. Online participants responded well to the material, as did participants who informed us that they were using workshop material "offline" (i.e. downloading the workshop material) in their programs at a later date.

In the anonymous online evaluation, participants told us that the content of the modules was (a) very useful (24 out of 30 or 80%); (b) somewhat useful (6 out of 30 or 20%); and (c) not useful (0).

"This workshop is a great training tool. We use this material with our board a lot. We refer to the resources on a regular basis and we intend to read the entire course".
(Quote from a workshop participant)

Module Length

We were less successful with assessing the length of each module. We had prepared eight modules that would take approximately two hours each to complete. The majority of participants (63%) found the length of each module to be an appropriate length. However, the module length was too long for many other participants (27%).

For a similar target audience (in our case, full-time workers who were taking this course in addition to their regular work day), we would definitely either lengthen the time frame of the workshop or shorten the content of the modules.

In the evaluation, participants told us that the content of the modules was (a) too much (8 out of 30 or 27%); (b) too little (3 out of 30 or 10%); and (c) just the right amount (19 out of 30 or 63%).

"The pace of the workshop needed to be slower so I can find the time to do the workshop and the activities. I felt rushed and still haven't gone through many of the items. We're a small office with only two staff and so much to do!"

(Quote from a workshop participant)

Resource Section of the Modules

CLO and OMAFRA determined that the resource section should:

- Provide participants with key information that would increase their knowledge of board – staff relations related to specific content of each of the eight modules
- Provide participants with resources within the modules and with links to supplementary resources that would be useful long after the workshop was completed
- Increase participants' knowledge of the wide array of valuable resources on the Internet
- Have hot links to key, credible material on "board – staff relations" that was available on the Internet (for example the Panel on Governance and Accountability website)
- Have hot links to material that was familiar to the literacy field (Alpha Ontario, OMAFRA fact sheets, CLO's website)
- Have resource listings of material that was very common and likely to be found in any library in Ontario

In the anonymous online evaluation, participants told us that the resource section of the modules was (a) very useful (26 out of 30 or 87%); (b) somewhat useful (4 out of 30 or 13%); and (c) not useful (0).

"I enjoyed being able to read the postings at my own pace. The same applied for absorbing new information, I did not have to keep up with anyone else and I did not slow anyone down. Thank you for being forward thinkers".

(Quote from a workshop participant)

ℒ

Tips and tools for developing online workshop modules

- ❑ It is key to break your workshop material into appropriate smaller postings. **People do not like to scroll through long, dense postings.** Material should only be one or two screens long. After that, divide up the module into additional parts.

- ❑ Develop your modules so that they are suitable for both online and offline use. Some participants will only want to download your resource material.

- ❑ Build "real life" examples from your target audience into your workshop. Ask participants to send you examples and quotes and weave this into the workshop content. Our participants strongly related to these "real life" examples and often noted this fact.

"Both of the organizations I am involved with right now are dealing with the very issues being discussed in this workshop". (Quote from a workshop participant)

- ❑ Post workshop information often enough to keep participants interested, but not so often that they will be overwhelmed. In our workshop, participants strongly told us that posting a course module once per week was the ideal time. Each module took approximately one to two hours to complete. Unless your participants are full-time learners, do not load on too much content in the first few weeks or sessions – many participants will become overwhelmed and may continue learning!

- ❑ Make the first few modules fairly short and easy. If participants can work through the material they will get a sense of accomplishment and success with online learning. Once this happens, they will be more likely to continue through the entire workshop.
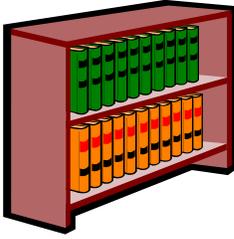
- Make your course material as readable as possible. Use lots of white space, graphics, large fonts, and plain language.

- Try to be aware of other major external events that your target audience may be involved with and do not schedule your workshop then. Because this type of medium is so new, people need time and energy not only for the workshop material, but to become comfortable with the whole online delivery method.

- Incorporating some fun activities and content within the workshop modules will help participants to work through the material.

- Use simple text, concrete examples and relevant hot links.

- Our participants seemed more likely to respond to questions when the discussion questions were asked as a completely separate module (rather than included with on module containing resource material).

- Clearly identify your workshop modules in the subject line at the time they are posted. This will allow people who only want to read or download the workshop modules, and not the discussion, to easily find the modules.

- If possible, archive your workshop material so that later participants can access the material easily. Although our workshop was finished in December 1998, it is still archived on the AlphaPlus system. New people continue to join up to the workshop in order to access its resources.

- If possible, have at least one person from your target audience work through and evaluate your workshop material prior to it being posted online.

- Post the workshop schedule at the very beginning of the course (the dates when the modules will be posted online). This will allow people to plan their schedules around material that is most key to them.

- Try to ensure that your workshop facilitator(s) are credible sources of information for the participants.

5. Marketing the workshop

The online workshop was marketed to the literacy community by means of:

- ❑ Information bulletin in CLO's "OurVoice" newsletter
- ❑ Workshop flyers sent to all CLO members, regional literacy networks, umbrella organizations, and provincial and national volunteer organizations (i.e. Volunteer Canada, Coalition of Ontario Voluntary Organizations)
- ❑ Posting on CLO's website
- ❑ Posting information on AlphaPlus
- ❑ Word-of-mouth by CLO board members and staff at various meetings

Both CLO and OMAFRA were surprised at the high level of interest in this workshop from the external (non-literacy) community. Discussions about this workshop were held with: Ministry of Education and Training; the National Literacy Secretariat; Volunteer Canada; Professional Administrators of Volunteer Resources; Ontario Network of Employment Skills Training Projects; Volunteer Centre of Ottawa-Carleton; Ministry of Citizenship, Culture and Recreation; Coalition of Ontario Voluntary Organizations; Industry Canada; Community Development Corporations, and many other external organizations.

CLO and OMAFRA spent 20 hours out of 482 total hours (4%) marketing the online workshop.

Facilitating the Online Discussion

CLO and OMAFRA believed that the online discussion was an important component of the workshop. The discussion would make the modules more "real" and relevant to community literacy agencies. We believed that participants would learn a great deal from each other. CLO and OMAFRA felt that very active facilitation would be key to the success of the online discussion.

CLO and OMAFRA spent a total of 80 hours out of 482 total hours (17%) facilitating the online workshop discussion.

The role of facilitator:

We saw our role as facilitators as:

❑ Encouraging and guiding the discussion

❑ Sharing information and resources and encouraging others to do the same

❑ Creating a welcoming environment

❑ Tying together the threads of the discussion and summarizing it

❑ Enforcing the discussion group ground rules, if necessary

❑ Keeping the discussion focussed on the workshop topic

❑ Clarifying the questions and comments of participants, if necessary

❑ Acting as an unbiased, neutral commentator

Creating a welcoming online environment:

❑ We believed it was key to create a supportive, welcoming environment for participants to discuss key workshop issues.

❑ In the introductory postings, we tried to create this environment for participants by setting (and enforcing if necessary!) basic ground rules for the discussion group. These ground rules included respecting the comments of other participants at all times!

❑ We felt that using a "personal" touch would make participants feel more comfortable about participating. We sent an e-mail to every participant to personally to welcome them to the workshop.

❑ All five facilitators introduced themselves and asked participants to do the same. We also posted our personal e-mails and telephone numbers for participants.

❑ As well, the AlphaPlus conferencing system already had an existing culture of creating a supportive environment for discussion groups. We would just build on this culture.

❑ As facilitators, we made the commitment to respond to every comment posted by a participant, especially at the beginning of the workshop. We wanted participants to feel that their input was valuable and that they were being listened to.

❑ We investigated the feasibility of sending an e-mail "bouquet" to each participant about one month into the workshop which would thank everyone for participating and encourage them to continue. However, this was not possible.

"To get really comfortable with this on-line "stuff" I have to pretend I am around a large table with all of you!"
(Quote from a workshop participant)

Active facilitation:

- We believed that active facilitation of the workshop would be key to its success.

- Because active facilitation is extremely time-consuming, and would be unmanageable for one person, CLO and OMAFRA committed to sharing the facilitation duties. Also, we felt that participants would benefit from the different points of view and personalities of the facilitators.

- OMAFRA staff took turns amongst each other in being the "lead" OMAFRA facilitator. The lead OMAFRA facilitator would check in every day. CLO's Executive Director would check in every day as well.

- So that there would be considerable content on the discussion group, we posted a workshop module either once or twice per week. We also responded to questions and comments daily.

- We believe that the first few weeks of the workshop would be key as to whether participants became involved or not. Therefore, we made sure to post information of particular importance and interest in the early weeks.

- The facilitators maintained constant, behind-the-scenes contact with each other by telephone, fax and e-mail during the workshop.

- We respected the time of our participants and did not allow the discussion group to become filled with comments that were not relevant to most participants. We wanted to keep the discussion focused on important issues relating to "board – staff relations", not to focus on general topics. As facilitators, we felt it was our job to ensure that the discussion remained focused, whether this meant deleting inappropriate comments, or sending polite e-mails to participants whom posted inappropriate material. However, these tactics were not necessary.

- One facilitator committed to collecting issues and questions that were posted too early by participants (i.e. their issue related to a module that was coming at a later date) and made sure that these questions were responded to during the appropriate module.

Encouraging online discussion

- We believed that our facilitation skills would be most needed at the beginning of the workshop, or when the discussion started to go off-track or flag. Once participants started to talk to themselves, the facilitators could "fade" back.

- We decided to use a facilitator from CLO (who was known to participants and who could help create a welcoming environment) and facilitators from OMAFRA (who were unknown to participants and who could bring an outside, neutral and expert opinion on the workshop topic).

- We also encouraged participants to send the facilitators e-mails if they did not want to post comments publicly. About ten participants chose to participate this way.

- The discussion questions in each module were specifically designed to encourage participation and responses from participants.

- However, participants could also answer the discussion questions (either singly or with their boards) off-line within their agency.

- The facilitators encouraged participants to respond to the questions and answers posted by their colleagues as much as possible, in order to encourage information sharing.

- If the discussion started to flag, the facilitators committed to contacting keen workshop participants and asking them to post comments.

- We posted a notice to "late-comers" halfway through the workshop. This notice welcomed the latecomers and briefly summarized for them where we were at in the workshop.

- We had wanted to e-mail welcome "bouquets" to all participants that would either thank them for their participation, or encourage them to begin posting comments.

- In the introductory posting, we informed participants that they would get more out of workshop if they participate in the discussion group.

> *"Reading other people's responses helped affirm that I was on the right track, so this was a good confidence building exercise for me! I think if another workshop was offered, I would feel much more confident in participating."*
>
> (Quote from a workshop participant)

Lurkers:

> *"I was comfortable with the environment, but still I didn't participate. I just wanted to read the questions, answers and discussions posted by others. It was still very useful just to read what others said".* (Quote from a workshop participant)

❑ CLO and OMAFRA believed that not all participants would want to post comments, in the same manner that not all people want to speak at face-to-face workshops. We felt it was important to accept that "lurking" was not a problem because people learn in different ways.

❑ Our goal was to ensure that all participants FELT comfortable to post comments in the discussion group. Whether participants chose to post comments or not was completely up to them.

❑ We recognized that some people might only want to read the modules and download material, or just read the comments of others and not participate in the discussions at all. We believed that this type of learning was just as legitimate as learning by sharing information in the discussion group.

❑ Our assumptions about lurking proved correct. Both the evaluation and personal e-mails noted how valuable the workshop was to participants who did not post comments. Many noted that while they did not post comments in the discussion group, that they enjoyed reading the comments of others, or that they just wanted to read and use the workshop modules.

`In the evaluation, 22 out of 28 (or 79%) respondents told us that they were comfortable participating in the workshop discussion.`

It was interesting to note that participants found reading the responses of others more useful than responding themselves.

In the anonymous online evaluation, participants told us that answering the discussion questions was (a) very useful (11 out of 28 or 39%); (b) somewhat useful (16 out of 28 or 57%); and (c) not useful (1 out of 28 or 4%).

However, participants also told us that viewing discussion and answers from other participants was (a) very useful (22 out of 28 or 79%); (b) somewhat useful (6 out of 28 or 21%); and (c) not useful (0).

Tips and tools for online facilitation:

- Active facilitation (daily!) is key to the success of an online workshop. Facilitators will need to make a major time commitment to their workshop.
- Regularly post relevant information and comments (at least twice per week). People are busy – workshop participants will want to read topical, important information, not chatter.
- Make sure that your postings are to the point. People do not want to read long messages and text.
- The first few weeks of the workshop will be key. You will need to actively work to post relevant information and resources and encourage discussion particularly in the early stages of the online workshop.
- To get the discussion rolling, you may have to post information that you definitely know will incite comments from your participants (because it is either controversial or is a major issue for your participants).
- Respond to people's online comments – they need to know you are listening.

Tips and tools for online facilitation (continued):

- Personal interaction with participants will increase workshop success. This can include sending personal e-mails to participants to welcome them to the workshop and sending follow-up e-mails to encourage them if they are not participating or to thank people for their online comments and contributions.

- Encourage people to answer questions from their fellow participants. Many participants commented that they strongly appreciated hearing how their literacy colleagues were dealing with the various issues that come up in the workshop.

- Written material can also be sent to participants to increase their comfort level with workshop material.

- If possible, have more than one facilitator. Facilitating an online workshop effectively is a huge task. Share the work and the online energy! Participants will also benefit from the different perspectives and knowledge of the facilitators. Make sure each facilitator is clearly aware of roles and when it is his or her day or week to act as lead facilitator.

- Set clear ground rules and guidelines for your workshop (for example: that all participants should respond with respect to the viewpoints of others!). If necessary, post the ground rules every so often to remind people.

- Try to keep participants focussed. As with regular workshops, some people will try to lead the discussion off topic, into areas that the majority of participants are not interested in. Politely control these "side discussions" by personally contacting the individual by telephone or e-mail.

- Some participants will likely join the workshop late. Briefly summarize where you are in the workshop material periodically and give new participants a clear entry point into the current discussion.

"I liked the open, welcoming environment. One was never made to feel that a question was stupid or off-topic". (Quote from a workshop participant)

---

Tips and tools for online facilitation (continued):

- Participants appreciated having an online workshop conducted in a welcoming, supportive environment. This helped relieve anxiety about taking an online workshop and posting comments in the discussion group.
- Post some fun information within the content (i.e. graphics, a joke, a personal anecdote).
- Good communication between facilitators (behind the scenes) is essential.
- Having a facilitator who is known and respected by the workshop participants is a great asset. So is having an outsider with new knowledge and experience to bring to the workshop! This points to all the more reason for having at least two facilitators.
- Active facilitation will be especially necessary during the first few weeks, until participants begin to "talk" directly to one another. Once this begins to happen, the facilitators can take a less active role in the discussion group.
- Be aware of other major activities occurring for your participants and try not to schedule your workshop during busy times.
- If possible, send an e-mail to those participants who are not contributing in order to find out whether they have any barriers to participation (technical or otherwise).
- Have the e-mail, fax, and telephone numbers of facilitators readily available.
- If your participants become involved and committed to your workshop after the first few sessions, they will likely commit to its completion. However, if participants fall behind early on, they will likely become discouraged and may stop participating. In order to engage partcipants at the beginning, make your first few modules very manageable.
- Be aware that the time participants are able to give to the workshop will vary. Some will check in daily, while others will only join the workshop once per week.

> *"What I liked best about the workshop was people sharing real-life ideas and suggestions. I also liked the fact that the topics generated some serious thought on important issues that we all face but don't always talk about".*
> (Quote from a workshop participant)

6. Technical considerations

The Ontario literacy community has benefited from having access to the AlphaPlus electronic conferencing system since 1991. Because of this long experience, the literacy field has a relatively strong level of knowledge with electronic conferencing. It was a key goal of this workshop to build on the existing electronic infrastructure and experience. We also wanted to expand the comfort level of participants with technology and the Internet.
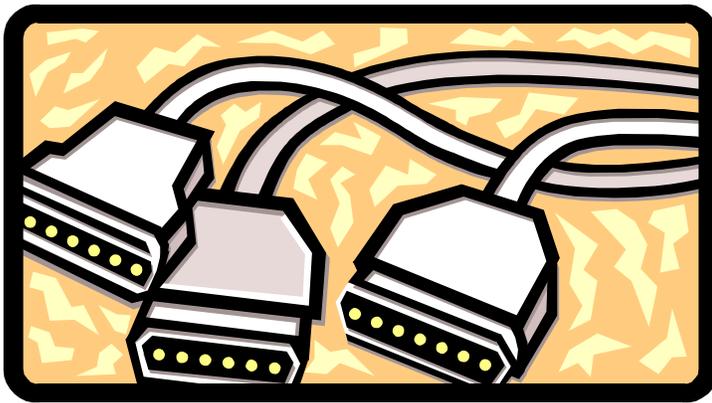
Our technical assumptions:

❑ Participants would be current AlphaPlus users

❑ Participants would have a basic knowledge of computers and AlphaPlus

❑ Participants would have a basic knowledge of online discussion groups

❑ We would not be able to provide participants with technical support

❑ We would provide only basic information on technical tips and Internet etiquette in the introductory postings, after that, people would be fine on their own

❑ For advanced technical support, participants would have to contact AlphaPlus or their local Internet Service Provider

Our Technical Role:

CLO and OMAFRA's technical role was very limited. Our role was as adult educators developing and delivering the online workshop. Our technical knowledge did not need to be extensive. We all had a good basic knowledge of the Internet, online discussion groups, and e-mail. We relied upon the AlphaPlus conferencing system and staff for technical support to this workshop. **It became clearly evident that there are two very distinct and important roles in online learning: technology (providing the infrastructure and support) and adult education (developing course content and resources, and online facilitation).**

OMAFRA assigned one technical support person to assist with the online workshop. This support included: attempting to format the workshop modules with suitable fonts and graphics, formatting, editing and posting the modules, and testing the online evaluation.

Our Technical Reality…….

In the anonymous online evaluation, 18 out of 28 (64%) participants told us that they experienced technical difficulties. Many other participants sent e-mails to the facilitators expressing this same concern.

> **"This was a great technological experience. Thank you for that."**
> **"I had difficulty getting onto the AlphaPlus website."**
> **"My computer locked up at the end of November and I stopped participating then. Once I get my computer going again, I'll download the rest of the modules."**
> **"This was an exciting new use of technology!"**
> **"I am new to the literacy field and also learning about using the technology, so I did lurk quite a bit, and felt a bit insecure about participating."**
> (Quotes from various workshop participants)

Technical tips and tools:

- **The technical and adult educator roles are both vital, but very separate roles. You will need both to successfully conduct an online workshop.**
- Know the level of technical knowledge of your target group. The level of technical support that you should make available will depend on this.
- If participants have very limited technical knowledge, an online workshop would likely be a very frustrating experience for them – unless you can provide substantial (and ongoing) technical support.
- Participants must have access to and knowledge of an appropriate technological infrastructure (hardware, software, Internet access, etc.).
- The technical knowledge of your participants may be even lower than you are assuming (unless your workshop is geared to an extremely technically sophisticated group), so make the workshop delivery as low-tech (from the users standpoint!) as possible.
- Many people get easily discouraged if they have technological difficulties and may just stop participating in the workshop. If you have the resources, check who has stopped participating, then contact them and ask them about technical (and other barriers) to participation. The ability to provide technical support will greatly assist and encourage participants.
- Only post file attachments in your workshop if absolutely necessary! Instead, post material as text. In our experience, many participants have difficulty in downloading attachments due to software incompatibilities and lack of technical knowledge.
- Start your workshop at least one week before you post the first module. This will give participants time to log on, explore the conferencing system, read the introductory messages and post introductions. This way, participants will not feel behind before the course has even started!

- A welcoming, supportive workshop environment will help relieve anxiety about taking an online workshop.

- Our target group was literacy coordinators (with presumably reasonably similar backgrounds). However, some participants adapted very easily to online learning, while others sent e-mails or evaluation comments expressing substantial frustration with the technology and the temporary shutdown of the AlphaPlus system due to the need to improve and upgrade the conferencing system.

- Many people have a lot of anxiety relating to technology. As much as possible, use a conferencing system that is very easy to learn and low-tech to the user!

- Good working relationships between the conferencing system and the workshop facilitators is crucial to the effective use of technology.

7. Evaluation

From the beginning, both CLO and OMAFRA realized the importance of this workshop since it was one of the first online workshops delivered in the non-profit sector. Accordingly, we made it a key project goal to track the successes and challenges of delivering an online workshop.

The workshop was evaluated by various means. One method was the development of an anonymous online evaluation that was completed by 30 workshop participants. The workshop facilitators also tracked their own time and evaluated the workshop from their point of view. We tracked our workshop statistics within the general AlphaPlus conferencing system. In addition, comments in the online discussion and personal e-mails to the facilitators also helped us to evaluate this workshop.

CLO and OMAFRA spent a total of 54 hours out of 482 total hours (11%)
evaluating the online workshop.

AlphaPlus conference statistics:

As of January 4, 1999, there were a total of 140 electronic conferences on the AlphaPlus conferencing system. Despite its short time frame (two months), our online workshop was the ninth busiest conference of the year with 216 messages. Our workshop, despite its short time frame, was one of 24 AlphaPlus conferences (out of 140) to have more than 100 messages posted. A total of 75 people participated in the online workshop.

The four workshop facilitators also evaluated the workshop from their perspective. This evaluation resulted in the following observations:

- ❑ Both CLO and OMAFRA were extremely pleased with the workshop and the partnership between our two organizations.
- ❑ Staff from both organizations effectively shared the workload.
- ❑ The response from participants and all involved has been overwhelmingly positive.
- ❑ Considering the innovative nature of this project and the huge learning curve for us all, we did not build in enough time to develop and deliver this workshop. Planning started in July 1998 and the workshop began in October 1998. Longer time frames would have been more realistic for all concerned.
- ❑ We were all flexible and responsive to the needs of participants and adapted the workshop as we went along.
- ❑ We recommend posting modules at the maximum of once per week.
- ❑ Shared facilitation of the workshop was key.

❑ We wished that the workshop modules could have been posted using larger fonts, colours, and graphics. We believed that this type of formatting would make the course material much easier to work through. Next time, we would have a longer time frame for the workshop to ensure that this happens.

❑ We were concerned that participation in the online discussion was very heavy at the beginning of the workshop, and then tailed off towards the end.

❑ Shared workload and clear areas of responsibility between staff were key.

❑ Having clear workshop goals was vital.

❑ We may have been too ambitious with content. Perhaps there should have only been four or six modules, not eight. It was a lot of material to work through.

❑ We would have liked to conduct a mid-term evaluation of the online workshop in order to learn the barriers to participation DURING the workshop.

❑ We would also like to conduct an evaluation three months AFTER the finish of the workshop in order to ask participants if they had made substantial use of the workshop material.

❑ The workshop took considerably more time than either organization had planned upon.

❑ Both organizations would like to explore the possibility of developing and delivering a second workshop together.

CLO and OMAFRA staff tracked their time on all tasks relating to the workshop.

a) Developing the modules = 132 hours (27%)
b) Planning = 100 hours (21%)
c) Facilitation = 80 hours (17%)
d) Evaluation = 54 hours (11%)
e) Administration = 40 hours (8%)
f) Report Writing = 35 hours (7%)
g) Technical = 21 hours (4%)
h) Marketing the workshop = 20 hours (4%)

Total: CLO and OMAFRA staff spent a total of 482 hours to develop, deliver and evaluate this workshop!

Participant evaluation:

Thirty people participated in the anonymous online evaluation of the workshop (which was prepared by the National Adult Literacy Database). This is what they told us:

Click here to view the questions and answers

Tips and tools for conducting an online workshop evaluation

- ❑ Plan your workshop evaluation from the beginning.

- ❑ Make the evaluation fairly short – approximately ten questions.

- ❑ Have participants conduct the evaluation online to increase the likelihood of responses.

- ❑ Allow participants to evaluate the workshop anonymously. People will feel more free and honest with their responses and you will learn more about the successes and challenges of your workshop!

- ❑ Do not have participants conduct the evaluation within the discussion group. It will clutter up the discussion group and will not be anonymous.

- ❑ Take the time to conduct a follow-up telephone or e-mail survey if your response rate is low. You will learn a great deal from these evaluations that will help you to improve your online delivery next time!

- ❑ Formally evaluate the experience of the workshop developers / facilitators as well as the participants. Since online delivery is so new, the workshop developers / facilitators will have gained valuable insights and knowledge.

- ❑ Use technology to assist with the evaluation (build user statistics into your conference, conduct the evaluation online, etc) to assist you and the participants.

- ❑ Consider conducting an informal mid-term evaluation with participants in order to learn more about their barriers to participation so that you can provide assistance while the workshop is still ongoing.

- ❑ Consider conducting a follow-up evaluation with participants at three or six months after the course.

8. Other Tasks

Other tasks relating to this online workshop included:

- Developing minutes and agendas for CLO/OMAFRA meetings
- Developing, printing and circulating information to community literacy agencies
- Writing project updates
- Writing up the workshop goals, terms of reference and other written material
- Preparing other written material

CLO and OMAFRA spent a total of 75 hours out of 482 total hours (16%) on administration, project updates, etc. for online workshop.

The Last Word………...

"I'd just like to say thanks for the opportunity to participate in this workshop; I learned a great deal about something I knew next-to-nothing about. The facilitation was great and I've made use of many of the resources in the modules as well. I hope the workshop will stay online as an archive, so I can come back to it for reference!"

(Quote from a workshop participant)