

FACILITATION STRATEGIES AND TACTICS FOR PROFESSIONAL DEVELOPMENT  
ONLINE LEARNING COMMUNITIES

By

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To Andrew Glenn

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FACILITATION STRATEGIES AND TACTICS FOR PROFESSIONAL DEVELOPMENT  
ONLINE LEARNING COMMUNITIES

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Online learning communities supporting educator professional development are increasingly emerging and a growing body of research suggests that these communities may have the potential to improve professional practice. Effective online learning communities enable teachers to engage in collaborative learning, focus on improving learning outcomes, form professional networks, and create avenues for critical investigation of practice.

Facilitation, a multifaceted role engaging in community development, engagement, building culture, and managing challenges, is critical in establishing and sustaining online learning communities and given the lack of research of the facilitator's multifaceted role; there is a need for constructing a framework to inform best practices for current and future facilitators. Understanding the roles, tasks, and characteristics of facilitators in various types of communities is a key component to discovering replicable trends of sustainability in well-established communities.

The purpose of this study was to explore the strategies and tactics used by facilitators to manage online learning communities and to understand how these factors might be used to construct and support new communities. A collective case study

framework, examining two cases, was used as part of an overall qualitative research methodology. Data sources used in this research study include a thick description of each online learning community website developed using a site analysis rubric and in-depth semi-structured interviews with facilitators from each community. The findings resulting from analysis highlight five key strategies, eight underlying sub strategies, and identified nearly fifty tactics used by facilitators. The outcomes of this study indicate that the identified strategies and tactics have relevant implications for online learning community facilitators, online learning community members, and future research.

# CHAPTER 1

## UNDERSTANDING FACILITATION OF PROFESSIONAL DEVELOPMENT ONLINE LEARNING COMMUNITIES

### **Introduction**

Online learning communities with an educational focus are becoming more prevalent in today's online environment. The growing body of research about the power and potential of online learning communities to improve professional practice has prompted the creation of many new communities (Darling-Hammond et al., 2009; Gray 2004; Little et al., 2009; Lock, 2006; Sprague, 2006). However; not all communities have attained the goals or fulfilled purposes for which they were created (Gray 2004; Kimball & Ladd, 2004). Research suggests that the role of the facilitator is one of the most pivotal factors in aligning online learning communities with their goals and purposes in order to make them more effective and sustainable (Gray, 2004; Johnson, 2001; Kimball & Ladd, 2004; Tarmizi, Vreede, & Zigurs, 2006). A facilitator aids in guiding a group in achievement of identified outcomes through unobtrusive assistance, guidance, or supervision (Merriam Webster, 2003). Unfortunately, there is little research on the role of the facilitator in online learning communities, specifically, the tasks, responsibilities, and characteristics involved in creating and sustaining an active online learning community (Tarmizi, Vreede, & Zigurs, 2006). This dissertation is designed to better understand facilitation of online learning communities and the potential impact facilitators may have within the community to support the creation of collegial knowledge designed to help improve professional practice. This dissertation was developed through three primary stages; first, exploration of the strategies and tactics through which facilitators of online learning communities create, manage, and

use processes and resources to aid learning, support collegial knowledge building, and improve practice. This exploration consists of a broad review of existing literature on facilitation specifically facilitation in learning communities as well as online learning communities used in professional development capacities. Second, collection of data to support an enhanced understanding of facilitation of online learning communities through website analysis, community observations, and a series of semi-structured interviews with site facilitators. Third, based on the results of the interviews and observations of online learning communities and facilitators; development and description of findings aimed at increasing the understanding of strategies and tactics used by facilitators to manage online learning communities and an explanation of how these factors might be used to construct and support new online learning communities.

### **Learning Communities for Professional Development**

The capability to create an educational environment where learning is collegial, interactive, and draws from authentic activities for the purpose of professional development offers a practical solution to a wide range of complex educational issues (Kellogg, 1999). Professional development learning communities represent groups of people who assemble for the purpose of collaboration to build new knowledge and address identified learning needs (Department of Education, 2002). Learning communities, constructed around shared identities and values (Palloff & Pratt, 2005), offer a social constructivist learning environment where learning is situated in social contexts (Vygotsky, 1978) and knowledge is facilitated, shared, and created for the benefit of a community of members (Kilpatrick, Barrett, & Jones, 2003). Several research studies suggest learning communities as a powerful tool for professional development in academic settings because of their ability to transform teaching into a

collaborative and empowering endeavor (Hord, 2009; Price, 2005; Smith, 2001).

Learning communities enable professionals to engage in collaborative learning and reflective practice (DuFour, 2004; Palloff & Pratt, 2005) to elicit and share practical knowledge, focus on improving learning outcomes, form new networks, gain support, create an avenue for critical investigation of practice, and improve communication and sense of community (Jones, 2003; Kaplan, 2002; Kilpatrick, Barrett & Palloff & Pratt, 2005; Price, 2005).

Online learning communities are being introduced rapidly, throughout various types of organizations, to facilitate knowledge creation and to address specific institutional goals and issues (Duncan-Howell, 2010; Flanigan, 2011; Lock, 2006; Smith, 2001). Researchers have shown that the use of technology and social interaction as a means to transform the ways we think, work, and communicate in the field of education can be a viable solution to improving professional practice (Foti, 1997; Januszewski & Molenda, 2008). Intentional integration of technology and a learning community model creates a unique platform which enables facilitation of knowledge and collaborative inquiry for the purpose of enhancing teaching and learning (Lock, 2006).

Learning communities may incorporate the technology and social interaction as a means to facilitate professional learning (Hord, 2009; Lock, 2006; Wenger & Snyder, 2000). Exploring new methods to advance professional practice through utilizing technology in a professional development realm represents a means through which learning may be improved (Claussen, Aquino, & Widerman, 2009) by expanding traditional professional roles, introducing new perspectives, and integrating more technology into teaching practices (Wesley & Buysee, 2001).

## **Facilitating Online Learning Communities**

In the development and facilitation of an online community of practice a facilitator's role is crucial in ensuring that the goals or objectives of the community are met, members receive proper support, interactions are congenial and appropriate, administrative tasks are addressed, technology is accessible and functioning properly, and professional practice is enhanced by community exchanges (Feenberg & Xin, 2004; Fusco, 2011; Haavind, Remold, & Schank, 2011; Thorpe, 2007; Wagenaar & Hulsebosch, 2008). Effective facilitators create a culture where inquiry is valued and support opportunities for learning experiences that benefit the community as a whole (Borko, 2004). Further, a facilitator's role is multifaceted and can include strategic leadership, linking members, organizing and promoting interactions which create community knowledge, encouraging participation, starting and contributing to discussions, and planning and executing community events, activities, and projects (Australian Government Information Management Office, 2006; Fontaine, 2001).

## **Online Teacher Professional Development**

Improving professional development and learning opportunities for educators is a significant factor in improving student academic achievement and initiating school change (Darling-Hammond, Wei, Andree, Richardson, & Orphanos, 2009). In many cases, teacher professional development in its traditional state, while recognized as important, has been described as insufficient, intellectually superficial, and unsupportive of teacher learning (Borko, 2004). Taking steps to improve teacher learning is essential and recent studies have identified integration of emerging technologies into teacher professional development as a key component to advancing innovation and achievement in teaching and learning (Little, et al., 2009; Partnership for 21st Century



Skills, nd). Online teacher professional development is a professional development opportunity that provides flexibility within teachers' schedules, offers a variety of resources (in some cases resources not locally available), and provides real-time, work-embedded support using the Internet as a vehicle of delivery (Dede, Ketelhut, Whitehouse, Breit, & McCloskey, 2009). Further, online teacher professional development offers new possibilities to educators by giving greater access to experts in the field, facilitating collaborative participation in teaching, allowing extended time for reflection and dialogue, permitting greater flexibility in scheduling and timing, giving greater control in development of personal learning spaces, and empowering teachers through the opportunity to take ownership of their own learning (Sprague, 2006). Research suggests that effective teacher professional development also includes: connecting professional development to practice while focusing on student learning, building strong relationships and networks with other educators, and utilizing a collaborative and collegial approach (Darling-Hammond, et al., 2009; Servage, 2008). These aspects, and many more, may be supported using technology and an online platform as a vehicle to deliver an innovative, low cost alternative or supplement to teacher professional development. Moreover, online teacher professional development has the capability to support development of a more systematic approach to professional learning, where equipping teachers with new tools and support may lead to improved student learning (Hirsh & Killon, 2009). Finally, utilizing the Internet as a medium to host a learning community has many advantages because the use of Internet technology has the ability to grow and strengthen communities through its

ubiquitous nature, wide use, flexibility, and potential for scalability (Schlager & Fusco, 2003).

In order to support new methods of learning in schools and as a means to aid in improvement of academic achievement, educator professional development and learning must be expanded; the creation of learning communities in the form of online learning communities have represent the potential to advance professional learning (Hirsh & Killon, 2009). Online learning will be an important avenue through which both students and teachers may pursue learning in the future (Lock, 2006; Sprague, 2006).

### **Purpose of this Study**

A better understanding of factors utilized by online facilitators to promote learning and improve practice is important in the creation of efficient, sustainable online communities supporting teacher professional development. Previous studies investigating the role of the facilitator in professional development propose that the facilitator is one of the single most important factors in the success of a community (Bolam, et al., 2005; Borko, 2004; Lock, 2006). Based on these findings, derived from face-to-face professional development communities, this study aims to examine the role of the facilitator in greater detail in order to form an improved understanding of the factors that are utilized in managing online learning communities. It is anticipated that the findings associated with this study will inform new or existing online communities.

The research questions addressed in this study are:

1. What are the strategies and tactics that facilitators use to manage online learning communities for professional development?
2. How might these factors be used to construct and support new online learning communities?

These questions were addressed through building a preliminary understanding of online learning community facilitation through research of current literature supporting the framework for the qualitative research methodology used in this study. Two mature online learning communities used for professional development were selected. Each community was observed and analyzed and in-depth, semi-structured interviews with the facilitators of the communities were conducted. Strategies and tactics utilized by the facilitators of the selected communities were revealed through analysis and discussion of the findings. Finally, areas of future research related to better understanding the proposed research questions have been suggested.

### **Benefits of this Study**

Presently, few studies have been conducted on online learning communities and even fewer have analyzed and described the role of a facilitator in this type of environment (Gray, 2004; Johnson, 2001; Tarmizi, Vreede, & Zigurs, 2006). Understanding the roles, tasks, and characteristics of facilitators of various types of online learning communities is a key component to discovering replicable trends of sustainability in well-established communities.

Research conducted by EDUCASE in 2009 identified key educational challenges including creating learning environments that are active, collaborative, develop critical thinking, and support knowledge creation; developing 21<sup>st</sup> century literacies among students and faculty; reaching and engaging today's learner; promoting faculty adoption and innovation in teaching and learning utilizing technology; and finding ways to advance innovation and technology in education despite financial restrictions; recommendations stemming from this study suggest that many of the identified challenges can be successfully addressed through teacher professional development

online learning communities (Little, et al., 2009). Through identification and research of these challenges, educational professionals are becoming more aware of the pedagogical implications associated with introducing emerging technologies to support 21<sup>st</sup> century teaching and learning (Little, et al., 2009). Further, research agendas of organizations ranging from the United States government to leading educational organizations such as the National College for School Leadership, the Graduate School of Education at Harvard University, the National Staff Development Council call for exploring new designs for teacher professional development utilizing technology and online models (Darling-Hammond & McLaughlin, 1995; Darling-Hammond, et al., 2009; Sprague, 2006). Facilitation is critical in establishing and sustaining online teacher professional development (Tarmizi, Vreede, & Zigurs, 2006) and there is a growing demand for constructing an understanding of the factors utilized by current facilitators in management of active online learning communities.

## CHAPTER 2 LITERATURE REVIEW

### **Introduction**

In order to better understand the factors utilized by facilitators of online learning communities to create, manage, and use processes and resources to facilitate learning and improve practice, a review of the current literature was conducted. The research for this project initially began with communities of practice which provided a framework allowing research areas to extend into exploration of learning communities and online learning communities. Through the perspective of online learning communities, facilitation as well as online professional development for education were also examined. Combined, this research suggests that facilitation of online learning communities is an area of emerging research which can inform understanding of these communities in an educational professional development capacity.

### **Parameters for Research**

The community metaphor is used often throughout research about groups of professionals who engage in collaborative learning and knowledge production. Authors have used the many terms to describe a community interchangeably throughout writings (e.g.; Clausen, Aquino, & Wideman, 2009; Hord, 1997; Muirhead, 2009 ) whereas some have intentionally and purposefully selected a specific term (DuFour, 2004; Garrison & Arbaugh, 2007; Gunawardena et al., 2004, Vescio, Ross, & Adams, 2008; Wenger, 1998; Wenger & Snyder, 2000). While the focus of this dissertation was specifically learning communities and online learning communities, in order to get a more complete understanding of what is already known about community learning and knowledge production; many terms were researched including: “learning communities”,

“professional learning communities”, “communities of practice”, “learning communities”, “online/virtual learning communities”, “online/virtual communities of practice”, “online/virtual professional development communities”, “wisdom communities”, and “communities of inquiry”. Research related to facilitation was conducted using search strings such as: “online facilitation”, “virtual facilitation”, “facilitation and online professional development”, “facilitation”, “moderation of online communities”, and “moderation online”. Research exploring the facilitation of online classes was excluded because, in many cases, the focus of the facilitator was centered upon building course knowledge and community instead of centering the focus around a group of practitioners to build a long-term, sustainable learning community. Over 100 articles were examined in this process, ranging in date from 1978 to 2010, focusing primarily on 2000 to 2012, utilizing the EBSCO, ERIC (the US Department of Education’s Educational Resources Information Center), WilsonWeb, Gale (Cengage Learning), and Google Scholar databases. The resulting articles were grouped into four categories: theory, learning communities, online learning communities, online professional development, and facilitation of online learning communities, and are explained more fully below.

### **Framework Shaped by Theory**

When considering an online learning community model for supporting knowledge, growth, and development, it is important to explore the theoretical foundations upon which the model is based. The learning community model uses a social constructivist approach that recognizes the concept of learning as an effort to synthesize information and experience (Hord, 2009). Vygotsky’s conception of social constructivist learning adds the stipulation that learning environments are collegial and draw from authentic

activities and contexts (1978). Additionally, a social constructivist perspective recognizes the importance of context or situativity in learning and knowledge development (Putnam & Borko, 2000). A situative perspective has three primary tenants that inform both social constructivist and learning community models. First, cognition is situated in experiences and activities where importance is placed on authentic activities as a part of learning (Wenger, 1998). Second, using a sociocentric view, cognition is recognized as a social endeavor where communities can provide cognitive tools to help individuals maximize learning through their experiences (DuFour, 2004; Garrison & Arbaugh, 2007; Gunawardena et al., 2004, Hord, 2009; Neff, 2002; Palloff & Pratt, 1999). Finally, cognition is distributed, meaning, cognition does not solely belong to a specific individual rather it is generated and supported by a community (Putnam & Borko, 2000).

Technology (methodology applying to application and development of various machines, tools, and techniques) has been used to facilitate social interaction in many educational applications (Saettler, 1990). However, as technological solutions are applied in the field of education, retaining social elements is an important part of learning (Dewey, 1916). Thus combining technology and social interaction has powerful potential, in the field of education, to change the way we think about knowledge and learning.

This research suggests that social constructivist and situative perspectives serve to inform how learning communities and online learning communities support learning. Such theoretical underpinnings are no guarantee that learning will occur; however, such

an understanding can inform the design of a learning community, specifically an online learning community, which ultimately serves as the focus of this dissertation research.

### **Learning Community Models**

Models of collegial collaboration are numerous and have many applications ranging from use in corporations, to governments, to schools, and even social networks (Clausen et al., 2009; Gunawardena, et al., 2006; Hord, 2009; Johnson, 2001; Neff; 2000; Wenger & Snyder, 2000). Each of these models is labeled with a specific name and is uniquely defined. In this field of study, several widely accepted literature reviews and articles consider the terms learning communities, professional learning communities, communities of practice, wisdom communities, and communities of inquiry to be synonymous and use them interchangeably (e.g. Clausen et al., 2009; Hord, 1997; Muirhead, 2009). While the terms share many similarities and are closely linked, there are fundamental elements which serve to suggest that they are vastly different types of communities (Wesley & Buysee, 2001).

Specifically examining each term helps to provide a more clear understanding to aid in the classification of the communities examined in this dissertation project. First, wisdom communities are communities that “share a common mission, engage in reflection and dialogue, believe in mutual trust, respect, and commitment, care for the common good, and empower members (Gunawardena, et al., 2004, p. 44).” Further, a wisdom community may encompass mentoring and learning to support knowledge innovation which may lead to transformational learning within the community (Gunawardena, et al., 2004). Next, a community of inquiry is built around the framework of three primary elements: social presence, cognitive presence, and teaching presence (Garrison & Arbaugh, 2007). These elements combine to construct an



educational experience, support discourse, set climate, and select content within a community (Garrison & Arbaugh, 2007). Professional learning communities are defined as, “teachers work[ing] collaboratively to reflect on practice, examin[ing] evidence about the relationship between practice and student outcomes, and mak[ing] changes that improve teaching and learning for the particular students in their classes (McLaughlin & Talbert, 2006, p. 4).” Professional learning communities are most often found in educational contexts and have the unique distinction of focusing on improving student learning (Vescio, Ross, & Adams, 2008). Next, a community of practice incorporates many of the components of the communities previously defined yet is unique. Building on the initial research on communities of practice spanning over ten years (Cox, 2005); Wenger, McDermott, and Snyder defined communities of practice as “groups of people who share a concern, set of problems, or a passion about a topic, and who deepen their knowledge and expertise in this area by interacting on an ongoing basis (2002, p. 4).” The key aspects of this term require that communities share a joint enterprise, mutual engagement, and a shared repertoire to produce capability to improve practice (Wenger, 1998).

Communities of practice focus on a shared goal (Clausen, Aquino, & Wideman, 2009), engage in making practice more transparent (Little, 2002), establish an environment where members interact and learn together, where professional development opportunities and insights may be shared, where instructive practices on how to use technology in the classroom are shared, and offer opportunities for joint activities and collaboration for the purpose of improving practice (Wenger, 2006). Communities of practice mediated by technology and information systems tools have

influenced the development of online learning communities (Sharratt & Usoro, 2003). Learning communities are “developed where groups of people, linked geographically or by shared interest, collaborate and work in partnership to address their members’ learning needs (Department of Education, 2002, p. 12).” Learning communities have the ability to increase intellectual interaction, promote coherence among learners, and create a sense of common purpose to increase learning (Kellogg, 1999). Palloff and Pratt describe online learning communities as “the vehicle through which learning occurs online [where] members depend on each other to achieve the learning outcomes for the course (p. 29).” The presence of collaborative learning, reflective practice, and transformative learning help to further differentiate this type of community (Palloff & Pratt, 2005).

Upon examination of each different type of a learning community, it is clear that there are aspects of each definition present in the online communities being studied for this dissertation project. Each of the terms offered have become commoditized in ways that over time have diluted their meanings (DuFour, 2004) however; they each have a wide body of research to support their use and can have powerful impact when appropriately used. Of each of the offered terms, the term which most closely describes the communities being studied is communities of practice with a learning community implementation. It is for these reasons that online learning communities will be the framework used to define the communities under evaluation.

Table 2-1. Learning Community Models

Categories	Leading Theorist(s)	Definition	Implications	Historical perspectives
Wisdom Community	Gunawardena, et al., 2004	Communities that “share a common mission, engage in reflection and dialogue, believe in mutual trust, respect, and commitment, care for the common good, and empowers its members”	-expands to mentoring and learning support -knowledge innovation -transformational learning -exists within a community of practice	-instructional design model to explain -collaborative learning -analysis of learning theories and principles related to collaborative learning
Community of Inquiry	Garrison, Anderson, & Archer, 2004	“Constructing experience and knowledge through the critical analysis of subject matter, questioning, and the challenging of assumptions” where learning is both collaborative and reflective	-higher-order learning -utilizes three primary elements: social presence, cognitive presence, and teaching presence -constructs an educational experience, -supports discourse sets climate, and selects content	-developed through empirical research of text-based dialogue -from formal computer-mediated communication courses -develops an instrument to assess cognitive presence in online communities
Professional Learning Community	DuFour, McLaughlin and Talbert, 2008; Hord; Vescio, Ross, & Adams, 2008	“Teachers work[ing] collaboratively to reflect on practice, examine evidence about the relationship between practice and student outcomes, and make changes	Teachers interact in a collaborative environment for the purpose of improving practice	

Table 2-1. Continued

Categories	Leading Theorist(s)	Definition	Implications	Historical perspectives
Community of Practice	Lave, Wenger, McDermott, and Snyder, 2000; Wenger, 1998	that improve teaching and learning for the particular students in their classes “Groups of people who share a concern, set of problems, or a passion about a topic, and who deepen their knowledge and expertise in this area by interacting on an ongoing basis ”	-communities share a joint enterprise, mutual engagement, and a shared repertoire to produce capability to improve practice	-derived from apprenticeship learning model later -shifted to focus on a more corporate application of knowledge management
Learning Community	Meiklejohn; Kellogg, 1999; Department of Education, 2002; Kerns, et al., 1999; Kilpatrick, Barrett, & Jones, 2003	“Developed where groups of people, linked geographically or by shared interest, collaborate and work in partnership to address their members’ learning needs”	-promotes social cohesion -community capacity building, and social, cultural, and economic development to create new knowledge	
Online learning community	Palloff and Pratt, 2005; Lock	“The vehicle through which learning occurs online. Members depend on each other to achieve the learning outcomes for the course.”	-presence of collaborative learning, reflective practice, and transformative learning	

## **Community of Practice Model and Learning Theory**

Given that learning communities are a derivative of the community of practice model, it is valuable to review the definition and early concepts as well as typical characteristics of the model. Etienne Wenger defines communities of practice as “groups of people who share a concern or passion for something they do and learn how to do it better as they interact regularly (2006, p. 1).” Communities of practice are formed informally by groups of people with a shared expertise or passion (Wenger & Snyder, 2000). The concepts of communities of practice are also constructivist in nature and focus on situated learning within a community (Smith, 2003). Although the idea of a community of practice has existed for centuries, Lave and Wenger coined the term based on studies of apprenticeship models of relationships where a community may act as a “living curriculum” for the apprentice (Wenger, 2006). According to Wenger there are three dimensions of communities of practice; what it is about, how it functions, and what capability it produces (1998). More simply it can be characterized by domain, community, and practice (Wenger, 2006). The domain is a shared interest, experience, or knowledge that distinguishes members from non-members. The community is a group of members who act collegially in terms of sharing information, engaging in discussions, and participating in joint activities to learn as a group. Finally, the practice is a development of shared practice where members develop a repertoire of skills, experiences, and knowledge to increase effectiveness of practice (Wenger, 2006). One of the greatest strengths of a community of practice is that the community can be informally created, by a group of members, around a shared experience. They can also be self-perpetuating constantly generating knowledge which in turn reinforces and renews individual participants and the community as a whole (Wenger & Snyder,

2000). The terms and characteristics of a community of practice lay the framework by describing vital components of the learning community model, in fact many research studies and writings about a learning community model use the community of practice model as the foundation (Brook & Oliver, 2003; Buffington, 2003; Kilpatrick, Barrett, & Jones, 2003; Schwier, 2002; Sharratt & Usoro, 2003; Tu & Corry, 2002).

### **Online Learning Communities**

Throughout the literature published on online learning communities (especially those with educational emphasis) many labels including professional learning community, wisdom community, community of inquiry, and community of practice have been used to describe online learning communities ( Gray, 2004, Gunawardena et al., 2009, Johnson, 2001, Mulphy et al., 2007, Schalger et al., 2002, Sharratt & Usoro, 2003). Modest research exists in the area of online learning communities (although it is growing rapidly), thus in order to gain a full understanding it is important to also include online/virtual community research. Understanding previous studies of online communities will help to not only define and characterize present communities but to also provide guidelines for improving and sustaining communities utilizing the Internet as a vehicle for collaboration.

Johnson describes an online learning community as a virtual community, which is “a group separated by space and time ... [using] networked technologies in one form or another to collaborate and communicate (2001, p. 53).” Sharratt and Usoro take the concept one step further in defining it as a collaboration of information systems which store, process, and communicate information blended with knowledge management which “seeks to leverage the organization’s expertise and know-how to add value to the business, utilizing some form of technological support system (2003, p. 187).”

Gunawardena, et al. (2009) take perhaps one of the most important steps towards defining an online learning community by first defining what it is not. According to Gunawardena, et al., an online community of practice is not simply social networking, social publishing, social bookmarking, or collective intelligence, but it is the integration of these tools to “facilitate collective intelligence through social negotiation when participants are engaged in a common goal or a shared practice (2009, p. 6).”

### **Advantages of Online Learning Communities**

The characteristics of online learning are similar to those of traditional learning communities, however; there are many advantages that the online platform can provide. Shared characteristics include community-centered learning (Gunawardena, 2006) and establishment of common goals and values (Molphy et al., 2007). Other similarities enjoyed by both formats include reducing isolation in work environments and creating identity as well as establishing a forum to negotiate the meaning of work-related problems (Gray, 2004). Learning communities utilizing an online environment add value in several areas including: (1) absence of formal boundaries of time or space, (2) norms dictating social interactions are more subdued in an online forum than in traditional communication, and (3) asynchronous communication may aid in equalizing communication practices (Johnson, 2001). Further it has been reported that online learning communities have greater ability to achieve economies of scale, have greater diversity, and better utilize informal communication channels (Schlager et al., 2002). Perhaps one of the most promising characteristics of online learning communities is their ability bridge “structural holes” in networks where people in different professional groups become involved in discussions that would not have previously taken place in a face-to-face forum (Ardichvili, 2003).

## **Challenges Associated with Online Learning Communities**

In addition to addressing similar challenges faced by traditional communities face, online learning communities encounter many additional challenges related to technology integration. First, although research about online learning communities is growing there are many areas yet to be studied (Darling-Hammond et al., 2009; Gray, 2004; Spargue, 2006). Also, a specific set of technical skills must be mastered by participating members (Johnson, 2001). In addition, because of their ubiquitous nature, as communities are built and sustained the moderator must remain sensitive to the competing urgencies of daily work tasks and responsibilities (Gray, 2004). However; given these additional technical challenges, it is critical to recognize that social, cultural, and organizational issues remain the greatest challenges that learning communities face (Wenger, 2001).

A vital key to the success of online learning communities is assigning or establishing a moderator or facilitator who can appropriately employ effective facilitation strategies to help sustain the community in times of both high and low utilization (Gray, 2004). The moderator must also employ social presence techniques and be able to handle “human issues” related to asynchronous discussions where interaction may be characterized as poor, superficial, or impersonal and lacking urgency (Gunawardena, et al., 2006).

In any successful learning community there must be a willingness to share knowledge and a willingness to use the learning community as a new source of knowledge (Ardichvili et al., 2003). Trust is a primary facet in the sharing and acquisition of this knowledge. While traditional learning communities face this issue, online learning communities are perceived as being more susceptible to this issue



because of the pervasive, ubiquitous nature of communities utilizing this platform (Johnson, 2001). Establishment of knowledge-based trust is crucial to the survival of online learning communities. Two dimensions of trust have been articulated: (1) trusting other members not to misuse information and (2) trusting the knowledge in the community as a source of reliable and objective information (Ardichvili et al., 2003). The quality of the information shared has been shown to directly affect participation in the community and it is important to recognize that simply sharing information and knowledge does not always result in new knowledge (Sharratt and Usoro, 2003).

Through understanding the definitions, characteristics, and challenges that an online learning community may face it is possible to better evaluate existing online learning communities. Prior research explores how communities have established themselves and overcome challenges which serve to better inform both present and future online learning communities. Further, an understanding of this research supports the development of new research in in this dissertation project examining online learning communities and constructing an understanding of the role of the facilitator through interviews and evaluations of selected communities.

### **Online Teacher Professional Development**

Professional development opportunities via distance education and collegial workplace practices have become more prevalent in the for-profit sector however; “on the whole, the field of education has not developed the kind of fine-grained investigations of teachers’ collegial workplace practices that have begun to emerge in other occupational areas (Little, 2002, p. 919).” This type of individualized can support teacher professional development and potentially increase student learning through augmenting teacher knowledge of new instructional practices and techniques where

teacher learning can “spiral down” to student learning (Borko, 2004; Darling-Hammond, et al., 2009).

Through the use of online learning communities, teacher development may be accelerated by expanding traditional professional roles, introducing new perspectives, integrating more technology into teaching practices (Wesley & Buysse, 2001), and facilitating participation in reflective communities which allow discussions, sharing, and connection of new concepts and strategies (Darling-Hammond & McLaughlin, 1995). Also, professional development is critical to student learning and research suggests that professional development is most effective when it is collaborative and collegial (Servage, 2008). Finally, collaborative professional development may also foster more positive feelings overall as well as have the ability to encourage improved teaching techniques (Clausen, Aquino, & Wideman, 2009) allowing schools to look at themselves as social organizations and engage in peer collaboration and collegial dialogues to improve teaching practices.

### **Facilitation of Online Learning Communities**

Communities may grow anywhere communication occurs however; building communities that create capacity that have the ability to promote improved professional practice is a complicated endeavor best guided by a facilitator (Williams, 1999). Separating understanding of the roles, tasks, and duties of the facilitator from the learning community may help to provide valuable insight in constructing new communities that have the ability to create capacity.

### **Community Development**

The specific mechanisms and tasks included in this role may be most easily identified throughout the stages of community development. Since many research

studies and writings about learning community models use the community of practice model as the foundation (Brook & Oliver, 2003; Buffington, 2003; Jones, 2003; Kilpatrick, Barrett, Sharratt & Usoro, 2003; Schwier, 2002; Tu & Corry, 2002) the stages of community development, used to describe facilitator tasks, will reflect a community of practice framework. McDermott, a recognized authority in the field of communities of practice, proposed five stages in his model of community development: planning, start-up, growth, sustaining, and closing (2000). Exploring facilitation through each of these stages provides insight into not only the specific tasks but also the role of the facilitator throughout the process of managing a community.

### Five Stages of Community Development

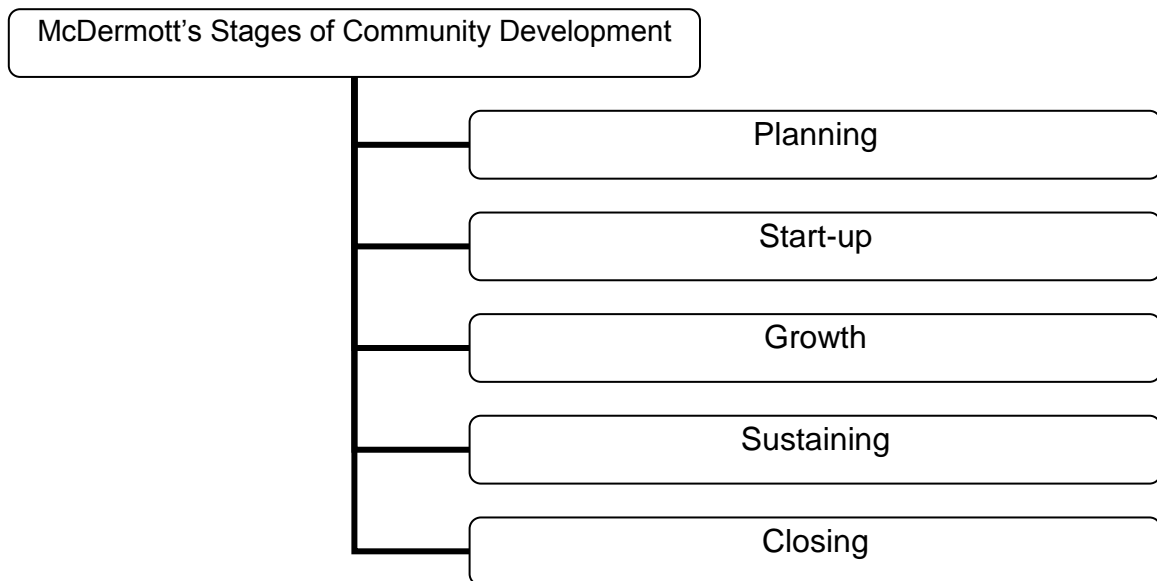


Figure 2-1. McDermott's Stages of Community Development. Adapted from McDermott, R. (2000). Community development as a natural step. *Knowledge Management Review*, 3(5), 16-19.

Tasks performed by a facilitator during the planning stage of a new community revolve around exploration of the possibility and desirability of the community (Tarmizi & de Vreede, 2005). Also, during this stage the case for the community is established and

common interests and topics are identified (Tarmizi, de Vreede, & Zigurs, 2006). During the establishment of the case for the community the facilitator aligns member interests with priorities while determining the significance of each of the priorities to the community. In this phase the facilitator will also determine whether content related to the focus of the community is pre-existing, address issues of domain, determine available capacity to provide for the community, and establish the value of the community (Australian Government Information Management Office, 2006). During this phase planning should not be too detailed or structured but should instead focus on ways to support development and growth as the community begins to evolve (McDermott, 2000).

Next, the start-up phase is where the community officially begins its launch. Tasks related to start-up may be most easily divided into two segments: building community structure and identification of membership and member needs. Building community structure involves identifying goals and operating principles (Australian Government Information Management Office, 2006) as well as setting up means to share knowledge and aligning knowledge sharing and creation with enabling technology (Tarmizi & de Vreede, 2005). Determining membership and related needs requires identifying member characteristics (level of demand for knowledge, willingness to participate, and levels of knowledge and expertise), examining member needs (key learning needs, expectations of participation, preferences, and critical success factors), and explaining the scope of the community (Australian Government Information Management Office, 2006). Recruitment of not just members but the right members to support the community is also crucial during this phase (Tarmizi & de Vreede, 2005). Clarifying and

reinforcing the purpose of the community is also a key role of a facilitator (iTrain, 2005). An online community adds operational components to the facilitator's tasks during the start-up phase. A facilitator must develop the web page as tool for learning and collegial development, must consider establishment of both public and private domains for participation, and construct links and structure for organizing the sharing of information (Australian Government Information Management Office, 2006). Finally, this is a critical phase of community development because if the community does not establish value quickly it will cease to grow, energy will fall, and the community will cease to exist (McDermott, 2000). The growth phase increases and expands members' exposure and network through the introduction of new members and ideas (McDermott, 2000). During this phase facilitators must establish trust and lower barriers between members to facilitate the sharing of information (Tarmizi, de Vreede, & Zigurs, 2006). Also, providing members with a sense of ownership is also vital to the growth of the community (Australian Government Information Management Office, 2006). Finally, a facilitator must help the group to function during this phase by not only building trust but also through strengthening a sense of commitment and fostering an environment of mutual support and encouragement (iTrain, 2005). Recruiting new members and adding useful information are also hallmarks of this stage (McDermott, 2000).

During the sustaining stage a community may be described as mature however; maturity does not equal stability. Communities are dynamic in nature which means that changes in membership, contribution levels, technology, and the information shared may require adaptation. A community in the sustaining phase must strive to maintain momentum throughout these changes (McDermott, 2000). A facilitator must also

continue to update the web page to reflect changes, continue to monitor and stimulate participation, and provide the community with new and useful information (Australian Government Information Management Office, 2006). Evaluation and measurement of the community may also be conducted during this phase where a facilitator may examine various factors such as: levels of participation and involvement, the range of stakeholders, creation of usable outputs (specifically those aimed to improve practice), the usage of the usable outputs, and member satisfaction (Australian Government Information Management Office, 2006).

The final stage of a community is closing. A learning community may close if it is no longer active (member have faded away), it fails to achieve its primary purpose or is serving no purpose, or has turned into a social club (Australian Government Information Management Office, 2006; McDermott, 2000). During this phase members should be consulted, recognized for their achievements, and contacted to be notified that the community is closing (Australian Government Information Management Office, 2006). Timing of closing the community is also vital since “the key to closing a community is to close it before it has lost too many members and help it to articulate its legacy (McDermott, 2000, p. 19).”

Understanding these tasks as components of phases of development may help to better clarify the importance and role of the facilitator in online communities to support new exploration of the strategies and tactics used to manage online learning communities which may support construction of new online learning communities.

### **Summary**

This chapter provides a research based foundation upon which to develop an understanding of the history and importance of collaborative learning in teacher

professional development. It also clarifies the purpose and value that learning communities, specifically online learning communities, may have in terms of the potential to facilitate teacher professional learning, improve practice, and thus increase academic achievement. Finally, this chapter provides an understanding of factors used by facilitators to manage an online learning community for teacher professional development. The amalgamation of this literature review serves to inform the design, methodology, and implementation of each component of this dissertation project.

## CHAPTER 3 RESEARCH METHODOLOGY

### **Introduction**

Groups of people are now able to collaborate in online communities across time and space using Internet technology; facilitators fill a unique leadership role in these communities (Feenberg & Xin, 2004; Thorpe, 2007). While many agree that facilitators are a vital component of online learning communities (Feenberg & Xin, 2004; Fusco, Haavind, Remold, & Schank, 2011; Thorpe, 2007; Wagenaar & Hulsebosh, 2008) there is little research available to support understanding of how that role is actually fulfilled (Tarmizi, Vreede, & Zigurs, 2006). The purpose of this project is (1) to better understand the strategies and tactics used by facilitators to manage online learning communities for professional development and (2) to understand how these factors might be used to construct and support new online learning communities.

A collective case study framework, examining two separate cases, was used to support the design of the research methodology. This case study design revolves around six steps which are reflected across multiple chapters in this dissertation (1) defining the research questions, (2) selecting the cases and determining the data collection and analysis techniques, (3) preparing to collect the data (constructing interview questions and website analysis rubrics), (4) collecting data, (5) evaluating and analyzing the data, and (6) communicating recommendations and implications (Simmons, 1980; Stake, 1995; Yin, 1984). The advantage to using a case study approach in this research project is its ability to relate everyday experiences and convey a better understanding of complex real-life situations (Soy, 1997).



The data sources used in this research study include a thick description of each online community of practice website developed using a site analysis rubric (Neilson, 2001) (Appendix C) and in-depth semi-structured interviews (Appendix B) with the facilitators from two different online communities of practice. This chapter describes the research methods and analysis techniques utilized to build explanations which propose to address the identified research questions. First, participant selection and recruitment will be discussed; second, data collection using rubrics and in-depth interviews will be reviewed; next data analysis techniques will be explained; and finally a discussion on validity, quality considerations, and researcher bias will be presented.

### **Participant Selection**

The two communities were selected using a purposive sampling approach (Glesne, 2006). In order to be considered for this study online learning communities were required to meet several qualifications: (1) classification as an online learning community (facilitated online where members share a common vision with a present of collaborative learning with the goal of improving professional practice), (2) in use by educators for professional development, (3) established through several years of content and user activity (enabling a more rich analysis of activities), and (4) a sustained membership with frequent facilitator-member and member-member interactions. In an effort to better compare communities, it was decided that both communities selected should have a similar focus and after initial research of online learning communities an emphasis on educational technology was selected. Initial searches were conducted using Google (a web search engine) and Dogpile (a meta search engine) using key words such as: educational technology, online, community of practice, network, and education. These searches resulted in identification of over 100

online groups using a variety of platforms (Facebook, Diggo, LinkedIn, Ning, and several others). Preliminary results of all online groups found through the initial search were recorded and several of the groups were initially selected and observed for interaction between members, facilitators, and frequency of usage. However; after applying the above criteria fewer than 10 communities qualified for the study using the identified inclusion criteria. Also, experts in the field of educational technology (including professors, peers, and colleagues) were sought for their advice on exemplary communities to observe and facilitators to contact. Further, Tech and Learning, a literary magazine focused on dissemination of research related to best practices for technology integration in teaching and professional development, identified the top 20 social networks for education (Kapuler, 2011). This report helped to further narrow the search and after reviewing each sites listed in the report only five were communities focused on educational technology; of those five one was a small community of approximately 300 members but resembled an online digital library for educational articles and lesson plans, two other communities were related, with one being a spinoff of a larger community identified, and a third community was a part of an organization which required membership (Kapuler, 2011). The top social networks identified by the Tech and Learning article aided in selection of the two online communities of practice chosen for evaluation in this research study. Combining the results from the preliminary Internet search, initial site observations, expert recommendations, and research resulted in selection of the two communities included in this study.

The first community selected (66,587 members as of May 2012) was included because it is a well-established community, large membership, frequent activity, and

permanent information (discussion posts, media, resources, and other member interactions that will never be removed from the community) posted by members. The second community, (6,647 members as of May 2012) was selected because it is also an example of a community that is an established successful community but implemented and utilized within a smaller scope than the first community. Both communities focus on education technology in K-12 classrooms. Both communities have been designed using the Ning platform. Ning is a for-profit company that provides a social website to bring groups together for a variety of purposes including building new knowledge, advertising, revenue generation, and improved social involvement in various ventures (ranging from non-profit to educational to music groups to for-profit companies). For an annual fee Ning features the ability to quickly create a social network. It was not the original intent of the design of the evaluation to use communities with similar platforms however; an added benefit to studying communities on similar platforms allows for more reliable comparisons between the larger and smaller communities to be made..

### **Participant Recruiting**

Once the online learning communities were identified the facilitator contact information, given on the home page of the community, was used to e-mail the selected facilitators an interview request (Appendix A). This interview request explained the purpose of the research, discussed institutional research board (IRB) requirements, explained why the community was selected, and discussed how the facilitator's point-of-view could aid understanding of the research questions associated with this dissertation.

Both facilitators contacted responded within one week and enthusiastically agreed to participate in the study. The researcher established a time with each facilitator for an interview to be conducted online using Skype™ as a medium and Audacity® as the primary tool to record the interview. Following establishment of an interview time, each facilitator was e-mailed an informed consent form (Appendix D) again explaining the purpose of the research study, time required, right to withdraw, and the contact information of the researcher and university. Each participant was also sent an electronic copy of the proposed interview questions prior to the scheduled interview (Appendix B).

### **Participant Expectations**

The participants were asked to participate in a recorded online interview consisting of 11 primary pre-written questions (e-mailed prior to the interview) with the addition of follow-up questions to probe responses given during the interview. Also, in order to create a more rich description of the participants' experience as facilitators, they were also asked to answer questions about background and recommendations.

### **Data Collection**

A qualitative methodology was selected for collecting, evaluating, and analyzing data. A combination of site analysis (observing activity, structure, details, and features) and interviewing helped to form an understanding of the routine roles, tasks, and strategies utilized by site facilitators in management of online learning communities.

### **Site Analysis Rubrics**

An inventory of each site's activities and resources was made noting how features were used by the facilitator and members of the community. Data collected from the site analysis included descriptions of structure, activity, features, and content. To

ensure that the selected sites were analyzed similarly a 60 item rubric was used (Appendix C). The development of this rubric was based in part on an article written by website usability expert, Jakob Neilson (2001) and was adapted by the researcher. Also, several items were included in the rubric after studying several existing online learning communities (discussion board, member information, and resources). Following the adaptation, the rubric was sent to other educational technology researchers who helped to add suggestions in order to better validate the rubric as a data collection tool for this project. Suggestions for improvement included considering Alexa traffic reports and rankings, wording modification to make statements more readable and easier to categorize, and inclusion of exemplary examples of the evaluated rubric items. Research of site activities and completion of the rubric supported the implementation of the semi-structured interviews with site facilitators. A few of the questions were designed, based on knowledge of site features, to elicit feedback regarding the facilitators perceptions of how activities and resources were selected, implemented, and what types of usage patterns are occurring. This analysis was useful and created a better understanding what types of activities and resources were most useful, engaging, and helped to sustain community members' involvement and interaction.

The site analysis for both community websites was originally conducted in January 2012. All items on the rubric were analyzed to determine if they were present, somewhat present, not present, or not applicable. Research comments and observations were also included. When the websites were checked by the researcher in March 2012, it was noticed that the general site layout of both communities had been

modified so the sites were reanalyzed and the rubrics were revised to ensure that the research being presented was as current and accurate as possible. Most of the other primary features, activities, and resources remained unchanged.

### **In-depth Interviews**

Two standard, online open-ended interviews, with facilitators from the identified communities, were conducted. Each interview lasted about one hour. Interviews were selected as a primary method of data collection because of their ability to aid in the understanding of central themes while allowing the “story” behind participant experiences to be pursued more in-depth (Glesne, 2006). The interviews consisted of 11 primary pre-written questions (Appendix B) and were framed around McDermott’s Five Stages of Community Development (McDermott, 2000) with the addition of follow-up questions to further probe responses given during the interview. In construction of the interview questions, validity was achieved through submitting the questions to an expert review and making modifications (reducing the number of questions, using more clear and neutral wordings, and more clear alignment of various questions to McDermott’s identified stages) based on expert recommendations. Also, in order to create a more thorough description of the facilitator, questions were asked about background and recommendations.

The interviews were conducted using Skype™ and recorded using Audacity®. The researcher also took comprehensive notes during each interview to aid in transcription. The interviews with both facilitators were both conducted in February 2012 with the interview with Facilitator #1 lasting one hour and fourteen minutes and Facilitator #2 lasting fifty-eight minutes.

To create a better understanding of the strategies and tactics used by facilitators to manage online learning communities for professional development, interviews provided a unique insight into each facilitator's individual perspective of their experience facilitating an online learning community.

### **Data Analysis**

Data analysis was performed to organize and categorize the data into emerging themes which provided greater meaning to the data. The data analysis approach used was a thematic analysis where the data was coded, grouped by code, then further analyzed and described (Glesne, 2006). The analysis was done with respect to the research questions asked at the beginning of the study (Spradley, 1979).

### **Site Analysis**

The site analysis rubrics provided technical data on each community. The rubrics were able to capture both qualitative and quantitative data and allowed the communities to be more scientifically compared and contrasted. As part of completing the site analysis rubrics, the researcher compared quantitative findings including total memberships, number of breakout groups, number of discussion forums, total amount of media, and total number of pages on each website. Following quantitative analysis the researcher next sorted the remaining data from the rubrics into general categories of home page elements (subdivided by left- center- or right-column), discussion board activities, media, member information, advertising and donations, and resources. These categories assisted the researcher in reporting the site activities and interactions in an organized and consistent manner. Finally, in order to gain an enhanced understanding of the capability of each community site and related interactions, the

researcher analyzed the rubrics for similarities between the two community sites and differences (unique features and observations) between the community sites.

### **Interview Analysis**

Following the conclusion of each interview the dialog was transcribed to help organize and analyze the information (McLellan, MacQueen, & Neidig, 2003) it was also transcribed as soon as possible to better ensure accuracy (Glesne, 2006). Next, the transcripts were reviewed for key words and categories which helped to suggest general patterns. In order to classify major categories or patterns in interviews as strategies and tactics it was necessary to identify operational definitions for the terms strategies and tactics. Strategies were identified as advanced planning directed towards achievement of long-term or overall goals; tactics were identified as a means to realizing strategy (The American Heritage New Dictionary of Cultural Literacy, 2003). After analysis of interviews with site facilitators five major strategies emerged; (1) community development, (2) engagement, (3) building culture, (4) generating revenue, and (5) managing challenges. Following the establishment of patterns, coding schemes were developed and applied to the transcripts to help identify the pertinent roles, tasks, and characteristics of the participants (Meyers & Newman, 2007). Each code was related to either a top-level strategy or an associated sub strategy (Table 4-2). An internal audit procedure was implemented where the researcher went through each interview transcript and coded participant responses as accurately and exhaustively as possible then after period of time reexamined the transcripts and edited existing codes as well as added additional codes.

After coding of interview transcripts was completed, responses for each major code were collected and arranged in a code book fashion to allow reflection on what



was learned and to aid in making new connections and gain new insights (Glesne, 2006). Through cautious examination of the interview data, interpretation of the data was possible through extending the analysis (Wolcott, 1994).

### **Researcher Subjectivity**

Qualitative research by nature is rich with interpretations of multiple perspectives, patterns, and is descriptive in nature (Glesne, 2006) which is influenced by the subjectivity of the researcher in the role of collecting, analyzing, and interpreting data. This study was influenced by the researcher in a variety of ways (generation of data, determination of what constitutes a data source, and assertions based on data,) however; systematic and disciplined reflection on researcher subjectivity and values serves to strengthen the outcomes of this research (Auerbach & Silverstein, 2003).

The researcher was led to explore online learning communities in more depth as an alternative to educator professional development after personal experiences with traditional professional development sessions which were rigid in schedule, limited in opportunity, and largely ineffective in inspiring and promoting improvement of practice in classroom teaching. Experiences teaching online courses for a technical college further promoted interest in how teachers and facilitators create a community where knowledge is constructed in a collegial fashion. Membership in online social networks used for social interaction further led the researcher to explore ways that popular networking tools and frameworks could be used to support not just improved educator professional development but an opportunity for educators, separated by distance, to create new knowledge with the capacity to impact classroom teaching practices and thus improve student achievement. The combination of these prior experiences led the researcher to design an online learning community for professional development of technology

teachers in a local school district. Utilization of the community was low as well as interest which led the researcher to consider exploring factors which contributed to successful and vibrant online learning communities used for professional development. The combination of these experiences enabled the researcher to go into greater depth in data collection and analysis through utilization of subjective experiences as a source of knowledge.

Further, the researcher held various views in key areas examined in the research. First, experience with corporate planning of new ventures provided specific experience with proposals and the planning phases of initiatives. Previous experiences in the construction of online learning communities included creating multiple online course spaces in addition to the aforementioned community of practice for career and technology educators. These communities were created with a methodological design which included measurable goals and objectives, timelines, strategies, site construction plans, and other specifics.

In an effort to prevent the interview questions from focusing too heavily on design factors McDermott's Five Stages of Community Development (reference) and Neilson's web rubric (reference) were used as a framework to ensure that other phases in community development were present in data collection and analysis. Additionally, peer review of interview questions helped to assure neutral wording for questions in all phases. To ensure that the role of the facilitator was more objectively constructed, a focus was established on meeting the objectives of the research; addressing the research questions and aiming to reveal an understanding of key strategies and tactics used in each community. Further, multiple sources of information (both site analysis

and the interview) helped the researcher to examine all information presented from multiple viewpoints to reduce personal bias. Finally, data collection was completed for both communities prior to analysis to prevent the researcher from drawing premature conclusions.

### **Confirmability, Credibility and Reliability Considerations**

To increase the confirmability of the study, several procedures were used. Clarification of researcher bias was addressed through reflection on researcher subjectivity and how it was used and monitored throughout the project (Golafshani, 2003). Furthermore, triangulating results of this study with research outside of online learning communities, including studies from sociology, business, economic development, and several others, not only aided in creating a more rich understanding but also helped to verify results. Finally, as an additional source of information to help the researcher gain a deeper understanding of each community prior to each interview, the site analysis rubric was used. In addition using the open-ended interviews to aid in understanding facilitator strategies and tactics the site analysis rubric was used to help confirm activities and facilitator presence. The transparent nature of the Ning platform, on which both communities were built, helped the researcher to verify statements made in the interview as well as to discover additional tactics being used by facilitators in the communities which lead to a more rich description of the data.

Creditability was increased through member checking which was applied by providing interview transcripts to participants, via email, to ensure that their responses were accurately reflected. Finally, to increase dependability peer review and debriefing via unbiased expert review was utilized to gain an external reflection on the research

methods, analysis, and conclusions (Glesne, 2006). Finally, detailed field notes from interviews, site analyses, and coding activities were archived for future possible usage.

To increase the reliability of the study several measures were employed. First, the researcher carefully reported (using rich, thick description) the methodology and data gathering throughout the project (Glesne, 2006). Also, since two interviews were conducted an interview protocol was constructed to guide administering and implementing each interview to ensure that they were conducted similarly. Finally, an expert in the field educational technology was asked to review interview questions to help ensure that the questions being asked would elicit appropriate data for this project.

### **Summary**

The research methodology employed in this study was deliberately selected in order to address the research questions being asked. To establish a better understanding of the strategies and tactics used by facilitators in management of online learning communities for professional development; observation of activities and interactions within the online community followed by one-on-one interviews to further investigate the facilitators' personal perceptions of their roles and responsibilities were utilized. The facilitators' personal perceptions when carefully examined emerged as primary categories (codes) and subcategories (sub codes) which when analyzed began to identify strategies, sub strategies, and tactics that were employed in management of these communities. Further, through extending this analysis the researcher has the opportunity to develop an understanding of how these factors might be used to construct and support new online learning communities.

## CHAPTER 4 FINDINGS

The methodology outlined in the previous chapter describes the procedures utilized to identify and gather research. This chapter presents an opportunity to delve into the data collected to initiate greater understanding and provide a research based rationale of the strategies and tactics used by facilitators to manage online learning communities and how those factors might be used to construct and support new communities (Krathwohl, 1998).

The purpose of this chapter is to present the main findings from the data collected relative to the stated research questions. The questions explored the strategies and tactics used by facilitators to manage online learning communities for professional development and discovering how these factors might be used to construct and support new online learning communities. A collective case study framework has been used to help support the design of the research methodology. In order to most clearly present the findings, each case will be presented by community (two cases). To give each case in this research project specific context, this chapter will begin with a General Overview section; first introducing each community and second presenting the strategies and sub strategies (emerging from key activities and philosophies described by the facilitators during each interview) into which the facilitator interview responses are organized and in later chapters analyzed and discussed.

The cases for Community #1 and #2 will each be presented through a narrative description of the community environment and design features followed by a description of the site facilitator interview organized into the identified five primary strategies and supporting sub strategies. Within discussion of the strategies many tactics utilized by

each facilitator are identified. The presentation of the facilitators' environments, stories, and quotations illustrate an interpretation which interweaves actions and philosophies in such a way that a framework begins to emerge which builds an understanding the strategies and tactics used and how they might be transferred to other online learning communities.

## **General Overview**

### **Overview of Selected Communities**

Each community selected is an online learning community used for professional development focused on supporting educators in the use of technology in education. Each community is open to the public for viewing and free to join (although each requires facilitator approval to reduce spamming). While these two communities share many similarities they are distinctly unique.

Community #1's overall focus is building community knowledge around Web 2.0 applications, social media, and other educational technology resources in classroom practice. This community was established in 2007 and has over 66,000 members. The average member of this community is female between 35 and 44 years old and has earned a graduate degree. This community experiences frequent, daily interaction from many members, has multiple web conferences each year, is engaged in a collaborative community book writing project, and has almost 900 individual breakout groups focusing on various topics related to education technology in teaching.

Community #2 is also focused on facilitating the use of technology in the classroom. This community was established in 2009 and has over 6,000 members. The average member of this community is female between 55 and 64 and holds a graduate degree. While a bit older and not as large as Community #1, this community

still has frequent interaction from members (although not at the same volume each day as Community #1) and focuses more on sharing content, tools, and resources with educators. Primary methods of communication with members are through featured blog posts, news feeds, and links to resources and supporting sites. Community #2 also has a large commercial presence through advertising, breakout group creation, and member interaction. This community also provides over 50 individual breakout groups to allow members to better connect with each other on topics of mutual interest.

Table 4-1. Overview of selected communities

	Community #1	Community #2
Year Established	2007	2009
Membership	66,603	6,650
Breakout groups	876	55
Hosts/Featured Members	4	6
Discussion forums	6,684 forums (13% of posts by facilitator)	520 forums (34% of posts by facilitator)
Alexa traffic ranking*	#116,917 global #46,962 United States	#1,021,051 global # 229,602 United States
Alexa Audience Snapshot*	Average Age: 35-44 Education: Graduate School Gender: Female	Average Age: 55-64 Education: Graduate School Gender: Female
Number of pages on site	-12 top level pages -30 subpages	-7 top level pages -30 subpages
Media	-12,121 photos (4 photos or <1% by facilitator) -2,471 videos (37 videos or 1% by facilitator)	-480 photos (71 photos or 15% by facilitator) -518 videos (299 or 58% by facilitator)
Sponsors	1	8

\*(Alexa, May 2012)

### Overview of Identified Strategies and Sub Strategies

The operational definition of strategy indicates advanced planning which is directed towards achievement of long-term or overall goals. As a means to realizing a strategy, tactics (or specific actions) are employed (The American Heritage New Dictionary of Cultural Literacy, 2003). After analysis of interviews with site facilitators

five major strategies emerged; (1) community development, (2) engagement, (3) building culture, (4) generating revenue, and (5) managing challenges. Following identification of major strategies, several sub strategies emerged which promoted better understanding of how the facilitators used specific tactics within their given communities to achieve the identified strategies (Table 4-2). Also, one strategy -generating revenue - and a sub strategy - building content - is used exclusively by Facilitator #2. The tactics utilized to achieve each strategy and sub strategy will be identified as each facilitator and related strategy or tactic is explained individually.

Table 4-2. Strategies and sub strategies identified through facilitator interviews

Strategy	Sub strategy	Use by community facilitator
Community development	Philosophy	1,2
	Identification of needs	1
Engagement	Encouraging Participation	1,2
	Building content	2
Building culture	Handling quality issues	1,2
	Sustaining	1,2
Generating revenue		2
Managing challenges	General challenges	1,2
	Closing philosophy	1,2



## Case #1: Community #1



Figure 4-1. Screenshot of Community #1

### Community #1 Environment and Design Features

#### Home page

The home page for Community #1 is the first page that users are directed to once they type the site address into the address toolbar of an Internet browser. The online learning community is built on a Ning platform and uses a Ning template. When first entering the site, visitors will see a large banner at the top of the web page; first, displaying the name of the community and second, the tag line stating the general purpose of the community; “web 2.0, social media, & more.”

On the home page there are several links and areas for site visitors to navigate to other community pages, media, and content. A standard navigation bar with mouse-over features (buttons change from white to gray and submenus appear when a user hovers over the features) appears at the top of the page. The top level pages on the

standard navigation bar are: Main, My Page, Web 2.0 Labs, Events, Forum, Members, Groups, Recordings, EdIncubator, Book, More, and About (most top-level pages also have related subpages that users may select). There are also navigation features at the bottom of the home page including: links to badges created by the online learning community, a link to report an issue, and a link for terms of service (written by the site facilitator). The terms of service page is 978 words and explicitly states the conditions that members must abide by in order to participate in the community and covers topics such as: intellectual property rights, viruses and spamming, fraud and impersonation, member privacy, advertising and solicitation, discriminatory posts, content that is adult in nature, content that is irrelevant or diminishes the quality of the community, engaging in interactions that are abusive to other members, and a notice for reporting alleged copyright infringement. Assuming the members are over 13 years of age; registering with and using the network implies tacit consent to these terms.

**Left-column elements.** On the home page there are several elements that are positioned in the left-column of the page. First, the members frame shows the twenty members with the most recent activity and links to member profiles. Below these member links is a link to view all members. A visitor map, made by ClustrMaps, shows a world map with a red dot on the location of each visitor to the community (the dots on the map show worldwide participation) is shown next. According to Alexa search analytics, 32.8% of visitors are from the United States, 19.5% are from India, 7.7% are from South Africa, and the remaining countries listed as Argentina (5.6%), Germany (5%), Canada (2.9%), and Malaysia (2.7%) (Alexa, 2012). The next element is a frame for the site's live shows explaining how members may meet in a live environment to

share favorite web tools and engage in virtual conference opportunities such as: virtual conferences, live show sessions, or recordings of previous sessions. A feature to search the site with Google is included (the Google search feature is a more robust search tool than the Ning search tool). Finally, an area is provided to help members find specific discussion topics. This area explains use of standard tags in forum posts and lists groups of discussions by tool, subject, and area with search tools for searching for tags within a forum, photo, or video; clicking any of the links takes the user to a list of multiple discussion forums related to the standard tag link clicked.

**Center-column elements.** The center-column is the widest column on the home page. The center-column elements represent fifty percent of the horizontal space on the page (with the left- and right-column elements each representing twenty-five percent). The first element in the center-column is a welcome message which briefly explains the community, gives a link to sign up and gives a link to an introductory forum message where members introduce themselves and tell about themselves and where they are from. The welcome message was posted by the site facilitator and also includes a link to starting tips which has general help, a link to an Elluminate recording of a tour of the community, and suggests that new members contact a host if additional help is needed. Next, a frame is included for an online learning summit which takes visitors to another page within the site that gives a description of the summit and links to the posted recordings. Forums are discussion areas where members interact frequently. In the forum frame, a link to the forum page is included as well as links to six discussion forums with the latest activity (with the exception of the Introductions forum the other five forums are all focused on educational technology topics).

The next frame in the center column is designed to help users identify smaller breakout groups focused on specific interests within the larger membership of the community. The heading of this frame encourages visitors to “Find a Special Interest Group or Start Your Own” and shows the ten groups with the most recent activity; this area also allows members to navigate to the groups page to search within all 876 groups. Next, members are given an opportunity to easily interact by posting a brief status update in the Latest Activity frame. In this frame, members may type a short message; share a blog post, discussion, photo, or video; and may send an update directly from Twitter or Facebook. This area shows the eight most recent posts (with the option to view more) and is used by members daily (numerous posts are made in this area each day). Finally, blog posts list ten member blogs that are the most recently updated with links to add a blog post or view all.

With the exception of the Welcome Message, the frames in the center-column of the home page are areas which encourage interaction and knowledge sharing activities among community members.

**Right-column elements.** The first frame provided allows users to “Sign Up” or “Sign In” to the site; an option to sign in with Facebook, Twitter, Google Accounts, or Yahoo! is also provided (this is a standard frame which is present in Ning sites). Next, a commercial policy statement is given stating, “If you are representing a commercial entity, please see the specific guidelines on your participation.” Users wanting more information on this topic can click on the text to be taken to a page within the site which explains the policies for commercial solicitations (this page is a forum page with the commercial solicitation policy stated at the top and an area for members to reply to the

discussion – as of May 5, 2012 there had been three hundred and ninety three views and thirty-four replies).

Two frames in the right-column which provide links to top-level pages describe two large projects being undertaken by the community where members are encouraged to participate and upload submissions for each project. Following the project frame, related links and events are provided to make visitors aware of sites, events, and professional development opportunities related to the focus of the community (educational technology).

The next frame explains that the site is free to use but offers users the opportunity to donate using PayPal; supporting the site by using the Amazon search link; and a thank you message thanking a sponsor for their support of the site. Additional frames are for community badges where members may get a badge for joining the site, an about area which provides a link to the site facilitator's profile and the Ning Network home page, and a link which directs visitors to the Twitter site account for Tweets posted by members about this online learning community. Finally, a frame is provided for awards which have been given by various organizations to the community, seven awards dating from 2007 to 2010 are shown.

### **Discussion boards**

Discussion boards, also called forums, are a place for members of the community to interact asynchronously via posted messages. Members may either begin a new discussion by posting a new topic (or thread) or may contribute to an existing thread. Message posts are most often a combination of typed text and hyperlinks.

As of May 6, 2012 there were a total of 6,684 discussion forums with various numbers of responses for each forum (this number represents all forums that have been

created in this community since its introduction in 2007 – all are still and available for interaction). Members are very active in discussions with activity occurring daily – in a sampling of twenty days, the average number of postings each day was 4.55. The replies appear to be related to the purpose of the site with many responses offering advice from teaching experience, technical experience, or other related knowledge.

The forum topics are organized into categories including: Introductions (2231), Book Discussions (103), Conferences and Workshops (301), First Time Posting (351), Help or Feedback Needed (3334), News or Noteworthy (698), Off-Topic or Just for Fun (154), Philosophy/Pedagogy (334), Reviews Software Tools and Services (409), Site Announcements (16), Site Features Discussion (101), Success Stories (138), Uncategorized (428), Learning Summit Proposals (5), Learning Accepted (71), Chapters – The Book (0). Topics may also be grouped based on the use of standardized tags and may be found on the home page grouping forums in to various categories by Tool (28), Subject (16), or Area (20).

Most topics are related to a Web 2.0 technology and its use in education – there are a few discussions, created by members, that are related to other topics (one member posted the Algebra homework for his class for the week as a post, another member made a posting for an online math tutor wanted, and the facilitator created a discussion post to make members aware of a donation site set up for another member who lost her home to a fire).

Members of the site also appear to be interacting with each other (not only the facilitator) with the facilitator participating in 892 discussion forums of the total 6,684 (representing thirteen percent of total discussion communication). Four hosts have been

identified to aid with facilitation. Their forum participation is at a lower volume than the primary site facilitator(250, 137, 36, 23). In the discussion forum area most of the hosts have participated minimally in most discussions posts acting mostly as respondents. However; in discussions started by hosts, in most instances, the host acted as a moderator of the discussion. The majority of the interaction on the discussion forums is occurring from member to member.

## **Media**

The media present on the site can be divided into two primary categories: (1) pictures and graphic design or (2) other media files. The pictures and graphic design media impacts the use, ease of finding information and navigability of the site. The other media files include audio, video, chat, web conferencing, and e-mail.

There is a location under the Members link on the home page for members to upload photos. There were 12,121 photos posted as of May 6, 2012 ranging in topics from conference photos to site visits to vacation photos to random photos (4 photos were posted by the site facilitator which accounts for less than one percent of the total photos posted in the community).

Multiple audio files are available for user to listen to previously recorded events from the site. There is a link for recordings on the top navigation bar on the home page divided into four categories: previously recorded Live Shows, recorded sessions from the Learning Summit, iTunes for interview podcasts (focused on topics related to educational technology), and recordings on PBS (Public Broadcasting Service) related to current projects and the purpose of the site.

There is also an area to add videos to the community. There were 2,471 videos as of May 6, 2012. Videos include a wide range of topics however; the majority of the

videos appear to be about educational technology topics. After reviewing a sample of twenty videos in the All Categories section only three appeared to be unrelated to a technology teaching content area (less than 4%). The videos are mostly posted by the members with the site facilitator only having posted 37 videos (one percent of the total posted).

A Video/Web Conferencing feature is offered for members to participate in via Blackboard's Elluminate. The community also offers free webinars, conferences, and workshops (these can be found under More on the top menu bar under Workshops).

Finally, e-mails are sent to members on a regular basis informing them of upcoming interviews and events in the community.

### **Member information**

The site itself is semi-restricted to members only; it is open to anyone to view however; no one can participate in the site (comment, add media, or contribute to discussions) without first becoming a member (membership is free and simply requires sending an electronic request from the site to the facilitator). There are 66,603 members of this site as of May 6, 2012. There is a profile page created for each member of the site. Member profiles provide information about latest activity, general profile information (school/work affiliation, blog, website, favored instant message account, Skype™ account, Twitter/Plurk/Other Account), A written section with a brief biography. Members may also post photos, videos, show links to colleagues, display breakout groups, and show discussion posts.

There is not explicit privacy policy or standards of behavior document posted however; a link for Terms of Service is included in the lower right corner of the home page. This describes the Terms of Service that apply to all users using this network.



The terms of service in Community #2 are identical to the terms of service in Community #1 with the exception that Community #2 is only offered to users 18 years of age and older instead of 13. The terms of service page is 978 words and explicitly states the conditions that members must abide by in participation within the community and covers topics such as: intellectual property rights, viruses and spamming, fraud and impersonation, member privacy, advertising and solicitation, discriminatory posts, content that is adult in nature, content that is irrelevant or diminishes the quality of the community, engaging in interactions that are abusive to other members, and a notice for reporting alleged copyright infringement. Assuming the members are over 18 years of age, registering with and using the network implies tacit consent to these terms.

Breakout groups are provided within the larger group with a total of 876 groups with a wide range of group foci.

### **Unique features of community #1**

One of the first content frames on the website is a brief Welcome Message for new visitors which explains the purpose of the community, encourages appropriate visitors to join, and provides links to resources (forums, recordings, and tips) where new users can get support on how to begin and interacting and participating within the community.

Other unique features on the home page include a visitor map, a Google search bar (a more robust searching tool than the internal Ning search bar), an area to help visitors find interesting discussions by breaking forum posts down by standardized tags (tool, subject, or area), and a commercial policy which explains the community's policy on commercial solicitation.

The first community also has links from the home page to several large scale collaborative projects in which members are participating. There is a book project, an

education incubator project, live shows, web conferences, and an online learning summit. Further, there is an area where visitors can connect with and join other Ning sites which have a similar focus (several of the communities were started by the same facilitator and are spin-off sites of the larger community described here).

The discussion forums in this community are organized into sixteen categories; they are further searchable by standardized tags which categorize them into three major areas (tools, subject, or area). Analysis of a sampling from a twenty day period (April 17, 2012 to May 6, 2012) revealed that members are interacting on a daily basis with an average of 4.55 posts each day.

Financial support of the site is identified through acknowledging one sponsor, soliciting visitors to make a donation via PayPal, and through promoting use of the communities Amazon search link.

### **Interview with Facilitator #1**

Many of the responses of Facilitator #1 strongly emphasize his beliefs in the importance of member engagement and building culture. This is supported by his background which includes his first job after college leading tour groups an experience which he believes prepared him most for understanding the dynamics of community. After that, he sold computers and helped to install open source software at schools which led him to speaking at conferences where he was initially exposed to Web 2.0 technologies. He was initially motivated to facilitate communities (he has created and facilitates several other communities on a wide range of topics) by blogging. He saw the ability of this medium to promote personal practice and growth but the task was very daunting and did not lend itself well to social interaction. Creating an online community

of practice and promoting social networking was a new way to connect educators without all the work of blogging.

Social networking really addressed the social and sharing needs and speaks to us on a very human level. I knew teachers didn't have a place to go to share and I found you don't need more than two or three people to feel like you are connecting with others.

### **Community development**

**Philosophy.** When Facilitator #1 was asked about the planning phases of the community he responded that he didn't do any planning which he felt implied an "advanced understanding" that does not exist in these types of technologies [online community networks]. Instead he approached it as an idea that he wanted to experiment with, using a group to construct a collaborative vision. He explained developing a community as a part of a group and understanding social networks as recognition of three key factors. First, recognizing that there has been a shift in educational power structure; instead of the traditional hierarchical structure, communities are growing out of need, education is moving from teacher centered to learner centered, educators are becoming engaged as 21<sup>st</sup> century learners, and the web is a voluntary medium where learners may choose to participate. Second, a facilitator must understand that engagement trumps content and finally, recognition that building culture is vital to community engagement (these two factors emerged as strategies are explained in more detail later). The facilitator also advises that there must a willingness to fail. In the past, he has created other communities that did not take off and he expressed that letting go of those communities was hard but recognizing when it is time to move on is important.

**Identification of needs.** To explore building new communities, Facilitator #1 advises that creating a new community may not always be the best solution; instead encouraging participation in an existing community may better meet member needs. If it is determined that a new community should be created this facilitator suggests sending potential new members to twenty different communities so that members may come back with a combined and will engage in building the new community from the ground up not the top down. Involving member in building scope is what the facilitator describes as a progressive pedagogy. Further, he explained that the confidence should not be placed in tools but in members, to facilitate this, the potential new members should spend an hour or two in other networks and report back on what they like. This facilitator also advises remembering that failure is sometimes important in community development. Again, this facilitator emphasizes that involving the members and allowing them to build the community that meets their needs, “collaborative vision must happen as a community ... you are missing the point otherwise.”

## **Engagement**

The Facilitator #1 identified engagement as a key factor to understanding communities and social networks, he further emphasizes that engagement should trump content.

You need to understand the value of connecting users and then helping them build a professional learning network for professional development. It is most important for them to catch the vision, you need passionate people who engage and want to be there.

One of the most important lessons to learn is to create something that is valuable to people, otherwise they will not be there. The facilitator emphasizes that the goal is to do things that make a difference and help people; as a result the community will grow.

**Encouraging participation.** There were several specific actions that the facilitator of this community performed to encourage participation and engagement between community members. He described how important it is to value engagement from the beginning involving the first members in building the community. Utilizing forum posts, pictures, and Web 2.0 collaboration tools helped to promote and encourage engagement where members were not only contributing and being engaged but also at the same time creating the community. These tactics helped “use communities to build communities” where once engagement is established it actually builds content which should focus around the needs of the members. Also, social technology in a medium such as Ning creates high visibility of transactions (activity feeds, forums, and listings) where people can see activity and participation. If what they see is valuable to them, then they will stay and participate. There were also several live events that the facilitator hosted that he said that members enjoyed and responded to positively: Webinars, discrete events, weekly live shows, and the global education conference.

In addition to the tangible actions mentioned above, there were several tactics that the facilitator utilized to encourage participation in the community. Overall, the primary strategy was building a welcoming culture where members can be affirmed through their contributions and are directly involved in the process. To promote membership of the community no promotions or advertisements were used, members simply told other people about the community and it remains that way today. The facilitator also held physical events to encourage participation and new members such as workshops, live online interviews, meetings, and online conferences.

## **Building culture**

Building culture was identified by Facilitator #1 a key factor in understanding a community and social network. Building culture involves understanding that the amount of influence exerted by the facilitator determines the overall tone or tenor of the network. Striving to create a welcoming culture helped the community, within sixteen months, to establish a culture that became self-perpetuating. In building culture, it is also important for a facilitator to be intuitive, sense nerves and focus on being a people person interacting with members rather than being an information technology director.

As the community grew and became larger it became more like what Facilitator #1 would describe as a network. As the community began growing it became difficult for members to have places to go and learn and have deep conversations which began to indicate the upper limits to the number of people who could be involved at this level. As a response, the community began to utilize breakout groups and build character within the culture that was self-supporting. After 10,000 members it was not possible for the facilitator to interact individually with each member so the he looked for new ways to connect users thus mitigating the need to be as personally involved.

The Facilitator #1 shared his belief that the web tends to reward authenticity and generosity and that focusing on the social aspect adds to the pedagogical goals of the community.

**Handling quality issues.** In building culture within a community, a role that emerged for Facilitator #1 became monitoring the quality and types of interaction occurring within the group. Issues related to negative information exchanges in Community #1 fall into two general categories: commercial solicitations and inappropriate interactions from a community member. The facilitator used several

tactics to handle the issues of negative information exchanges. To manage commercial solicitations and influences on the site the facilitator created a policy statement and posted it to the front of the website explaining the community and outlining appropriate interactions (in the interview he identified this as a preventative measure). If misinformation was posted or if a member was being highly critical or abusive to other members the facilitator would consistently post public responses that where the other members and visitors to the site would see his comments. After setting the tone for appropriate interactions, often he found that in these situations other members would also help in policing misinformation or abusive behavior. If these tactics did not work, then he suggested personally contacting the member by (phone if possible) to inform the member that complaints were being lodged and to explain that if he or she wanted to continue to participate in the community that it would be for behavior to be positively modified. In the experience of this facilitator, the members responded and changed their behaviors as a result of going the extra mile for them. Typically, this resulted in better members for the community because the facilitator cared and reached out to them. The facilitator summed all this saying, “Facilitators and founders of a network have a huge amount of influence, just like a teacher.”

**Sustaining.** As a part of building his community Facilitator #1 looked for ways to help sustain the growth, membership, and information exchanged in the community. He shared that one of the most important aspects is to focus on the social aspect and to infuse that with pedagogical goals (the learning and sharing of community knowledge). As the community grew, he began to notice that there would be times when a member would post a question that was not answered which initially was disappointing to him

however; he said that he had to let go of expectations and be comfortable that if all questions are not answered. Instead he stated that, “The real value is in finding other people and creating those conversations.”

A unique feature within the community is the ability to create groups. This allows members freedom to participate in areas where they perceive value and it also allows the community to evolve so that continues to meet the varied needs of a diverse population of members. Further, the facilitator stated that it is not his job to force feed anyone or to keep a community going if no one sees value any more. Finally, Facilitator #1 feels that as a product of the voluntary nature and culture that has been established within Community #1 that members have not been very critical, if they do not like the community or if they perceive no value, they simply stop visiting the site and participating in the community.

### **Managing challenges**

**General challenges.** As Community #1 became more established, one of the largest challenges facing this community was growth. The facilitator admitted that he felt temptation to keep everyone in Community #1 but as he considered how best to manage the large growth of the community he realized that having one very large community would not have been respectful of the conversations that needed to happen and to the user choice that had been such an integral part of the culture. He learned that the foci of the members of Community #1 were so diverse that all conversations were not best facilitated in one online learning community so he encouraged people to start their own spin-off Ning networks. He did however state that, “It was hard and the only way I could get there was because Ning was paying me to evangelize the platform.” So the response to growth was starting new networks which benefited



Community #1 because it was seen as launching pad or springboard for new conversations and thus new online learning communities. Other than managing large growth, according to the facilitator, there were no other perceived negative challenges. In a final statement regarding responding to challenges faced as a facilitator of Community #1, the facilitator stated that he felt his greatest fault was caring too much.

**Closing philosophy.** When asked if he believed if and when it was appropriate to close a community the facilitator responded that he believed it was never appropriate to close a community even if a community is only serving a few members stating that there is “an accumulation of conversations which creates a social contract and I would want that to be open as an archive.” The facilitator felt that a community is best “managed” by allowing involvement not mandating involvement which promotes the learner and user centered concept and supports his argument for leaving a community open.

### **Final recommendations**

The Facilitator #1 has five years of experience facilitating this community as well as experience building and facilitating many additional communities. To help current or future facilitators, he offers several recommendations. First, a facilitator should focus on being intuitive and sensitive to nerves and people, really building a community, instead of focusing on information technology aspects. Facilitators should also remember that they have an enormous amount of influence on the members of their community. Second, focus on engagement versus content; do not dictate how you want people to participate instead allow them to define how they want to start or engage. The facilitator feels that it is important to remember that you do not have to build everything but you should instead watch and figure out how to help.

## Case #2: Community #2



Figure 4-2. Screenshot of Community #2

### Community #2: Environment and Design Features

#### Home page

The first page that users to Community #2 are directed to is a splash page for the site including the name of the site, a general description of the site (what it is, who it is for), and links to what's new, sign in, join or download the site's free Android app. On this page, users may click Enter and be taken to the primary home page. The online learning community is built on a Ning platform and uses a Ning template. When first entering the site, visitors will see a large banner at the top of the site first displaying the name of the community and second the tag line stating the general purpose of the community, "Facilitating the Use of Technology in the Classroom."

On the home page there are several areas where the user can link to various topics within the site. There is a navigation bar at the top of the home page with mouse-

over features that will gray out each selection and give a drop down menu when it is pointed to. The general links provided are Home, Community, Communications, Resources, Events, News Feeds, and About Us. There are also navigation features provided at the bottom of the home page. A link to the site creator's (facilitator) member page (in Ning) is included along with links to badges created by the online learning community, a link to report an issue, and a link for terms of service (written by the site facilitator).

**Left-column elements.** The home page is divided into two columns with the left column spanning across sixty percent of the horizontal space on the page (the right column accounts for the remaining forty percent). There are several elements in frames arranged in this column.

The first frame that users see is a frame that is labeled features and shows an award (Top 20 Social Networks for Education by TechLearning.com). Latest Ed Tech News is the next frame, this frame features five current articles that are linked to the site through RSS feeds coming from Converge Magazine, District Administrator, Education Week – Tech, eSchool News, Tech and Learning, Technology Trends, and THE Journal. The next frame on the page allows visitors to easily choose the information they are most interested in seeing. Instead of listing each topic in another frame resulting in a longer home page; users click a tab to choose Latest Activity, Monthly Top 10, Discussions, or Blogs. Groups are shown next, this is an area showing links to fifteen breakout groups with thumbnail icons representing each group. Finally Educational Technology Bookmarks are provided with three links to educational

technology tools (all posted by the facilitator) and a link for More which takes users to the facilitator's Diigo page featuring 3,115 links (as of May 6, 2012).

**Right-column elements.** The first frame provided allows visitors to "Sign Up" or "Sign In" or an option to sign-in with Facebook, Twitter, Google, or Yahoo! (this is a standard frame which is present in Ning sites). Next, a link is provided which sends visitors to the site's Twitter account of 688 tweets and in Shares with 23 (both as of May 6, 2012). Other social media links provided directly below are: Facebook, Diigo, Twitter, the facilitator's personal blog site, LinkedIn, and Kindle blogs. To further facilitate user connectivity and access to the community a free app download for the site (in both Apple and Android platform) is provided. At the bottom of the right-column a thumbnail picture with link to the site's Facebook Group is provided.

Several links to media items are show in the right-column. First, a frame describing the webinars series (in association with the sponsor BrightTalk) and links to participate is provided. Also, frames for newly posted photo and video content are shown. A calendar is also provided with links on various days displaying planned events – clicking the link will take the user to a brief description of the event and related details; there is also a link to each of the events listed below the calendar giving the title of each event.

Finally, there are multiple advertisements listed in the right-column. First, a link to Saint Joseph's University's Instructional Technology program is shown; clicking this link takes viewers to the school's website. Similarly a link to Southern Wesleyan University is also given under the heading Advertisements.

## **Discussion boards**

Discussion boards are a forum area where community members may come to post messages related to educational technology topics. Members may create a new discussion topic (or thread) and other members may either respond or create their own new topic. There are 520 forum discussions as of May 6, 2012. The discussion forums available date back to the creation of the site. Discussions are grouped as either Featured Discussions (3) or Discussions (the ten most recent, at the time of review, all show activity within the past month). The featured discussions are directly related to promoting the community: one about how to follow the community on Twitter (no discussion – just an announcement), one on the app development soliciting a partner for aid in developing an app for Apple (no discussion), and the final about Pearson, Incorporated sponsoring a new Ning Mini program for education (only a few comments about correcting a broken link). The general forum topics and discussions revolve around various educational technology issues, questions, and resources. Discussions are not grouped by category but may be searched using a Ning search bar.

Most topics are educational technology related and several include links to other sites where additional tools and resources may be shared.

After review of member interaction and participation in discussion forums it was found that some members are very active in posting new discussion topics but other members do not seem to typically respond. In a sample of the most recent fifty discussions (about 10% of total discussions) five forums had one reply, one forum had four replies, and the remaining forums had no replies. In a sampling of the past twenty days, the average number of postings each day was 0.25. The facilitator is involved in 179 of the total 520 (thirty-four percent) of all discussions with involvement ranging from

starting the discussion, to responding to discussions started by other members, to guiding a few members with inappropriate responses to either post information in a more appropriate spot or to moderate commercial interests.

This site also offers an area called a Leaderboard where the top five content contributions (one is posted by the facilitator), members with the most postings (the facilitator is listed as first), blog posts (one posted by the facilitator), and videos (all posted by the facilitator) are highlighted. The facilitator represents forty percent of activity posted in the Leaderboard.

## **Media**

Media can be grouped as either: (1) pictures and graphic design or (2) other media. Most images are integrated into other features (blogs, group logos, videos, etc...). The site created images, logos and graphics appear to be related to the topic being presented and primary focus of the community. On the Photos page there are a total of 480 photos. The site facilitator has posted seventy-one of the total photos (fifteen percent of total content). Many of the photos are educational technology focused and appear to be graphics from another website however; only a web link is used to attribute the source.

Community site content also includes videos. There are 518 videos posted (as of May 6, 2012) and are divided into two categories: featured videos which features four videos (all posted by the site facilitator) and general videos which includes videos that relate to educational technology and are frequently updated. The site facilitator has posted 299 videos in this area (fifty-eight percent of the total videos posted).

The site also offers BrightTalk webinars in a channel created by the facilitator within BrightTalk allowing members to participate in relevant live and recorded

interactive webcasts. Visitors must have a BrightTalk log-in and password in order to access this tool (the service is free).

Finally, e-mails are used to communicate with members. The frequency of e-mails sent by the facilitator varies from multiple e-mails sent in one day and to no e-mails for several days. Also, users may choose to communicate with other users who are currently online through using the chat feature.

### **Member information**

This site is semi-restricted to members only, it is open to anyone to view however; no one can participate in the site (comment, add media, or participate in discussions) without first becoming a member (membership is free and simply requires sending an electronic request from the site to the facilitator). A members page shows six featured members at the top; below the remaining 6,650 members are listed (as of May 6, 2012). Each member has a profile page including General information, Latest Activity, Friends, Groups, RSS (Really Simple Syndication) feeds, Other information, Comment Wall, and uStream link. Also, a Member Map (provided by Apps. IO) is a link option under the Community submenu. This map shows the location of the members of the community displaying membership in worldwide locations. This site has a global Alexa search analytics rating of 1,021,051; since this ranking is less than 100,000 no specific historical data about the geographic breakdown of site visitors is provided (Alexa, 2012).

An explicit privacy policy or standards of behavior document is not posted however; a link for Terms of Service is included in the lower right corner of the home page. This describes the Terms of Service that apply to all users using this network.

Smaller breakout groups are provided within the larger group. On the groups page there are four featured groups listed at the top of the page and fifty-one additional

groups are below (as of May 6, 2012). It is not clear why featured groups are selected they do not appear to have the most members or most recent activity. Most group topics appear to be related to educational technology however some groups are created by and for commercial companies or tools for sale.

### **Advertising and donations**

The home page of the site does not have any explicit ads however; under the Supporters link it shows all companies which have a commercial interest in the site (Atomic Learning and Collaborators are Efquel, Hextlearn, Engage Learning, Web 2.0 European Resource Center, Glogster, BrightTalk, and Adobe Education Exchange). Other commercial interests on the site which may generate revenue for the facilitator are: Kindle Blogs (taking users to an external website - Amazon.com - where members can buy a blog subscription for \$0.99) and a site shop developed by a third party group (Café Press) where members may purchase site merchandise (long sleeve t-shirts, short sleeve t-shirts, tank tops, hoodies, fitted t-shirts, baseball jerseys, kid sized items, bibs, tote bags, messenger bags, aprons, and dog t-shirts).

### **Resources**

This site offers several free resources to members related to the overall focus of the community. From the home page under resources some additional resources are: links shared by the site facilitator as well as other users and free publications of free education magazines and downloads from [tradepub.com](http://tradepub.com). Additionally there are vendor offerings listing featured vendors including Cambium Learning Technologies, Atomic Learning, EasyBib, Ginger, Zimmer Twins, We Muv, Sparsha, Buzz Math, Go!Animate for Schools, Character Booster, and Class Parrott. Users may use this area to navigate to site pages created for each vendor offering: an introducing to the vendor, links to the



vendor site, vendor videos, typically either a free trial or a discounted rate for community members.

## **Unique features of community #2**

There are several unique features of Community #2's site. On the home page this community offers resources, Ed Tech News through various new feeds, educational technology bookmarks (through linking with the facilitator's social bookmarking site), the ability to follow the group on LinkedIn, free apps to keep the user connected with the site (in both the Android and Apple platform), a calendar with a schedule of events, and identification of the top content in the site.

The discussion forums in this community are organized into two categories; Featured and All. The forum area also allows discussions to be created by commercial companies and interests. There is also an area in the forums that the facilitator created called the Leaderboard which shows the members who have participated most in this discussion boards (the facilitator represents forty percent of all content posted in the Leaderboard area). Member participation in the forums does occur frequently but not daily and has an average of 0.25 posts per day (based on analysis of a twenty day sampling from April 17, 2012 to May 6, 2012; the total number of posts across all forums was added and then divided by the sample period, twenty, to find the daily average).

Financial support of the community is identified through acknowledging eight different sponsors (many of the sponsors also offer free trials, samples, or other incentives to members of the community). Members may also purchase a paid subscription to Kindle blogs or visit the community store and purchase merchandise with the community's logos.

Community #2 offers resources in addition to the resources that members are sharing with each other. The site offers a place for favorite website links (linked to the facilitator's social bookmarking site), free publications, and information on site vendor offerings.

### **Interview with Facilitator #2**

Facilitator #2 was an educator in a New Hampshire school district and has recently moved into a supervisory position of other educators. He says he is passionate about the use of technology in education which was supported by being able to work in state-of-the-art schools for most of his teaching career. His motivation to found and facilitate Community #2 came a few years ago when he was looking for a change and a new outlook for his education career and it was suggested he contact a career counselor. The career counselor suggested that he join LinkedIn (the world's largest professional network on the Internet) and after signing up he noticed that it was a good platform for people in the business world to make connections but that there were almost no educators in the network. This led him to believe that he might be able to create a venue to address problems that educators face on a daily basis and enable better networking between professionals in the educational technology world. From there he decided, "what educators really needed was a common place where they could go and have all the resources they would need to better integrate technology into their lessons." This prompted him to create a platform where people can go as a jumping off point for finding educational technology resources.

### **Community development**

**Philosophy.** Facilitator #2 stated his belief that the only way to learn how to successfully integrate technology into education is to engage in collegial learning, thus

the overall goal of his site is to provide a venue for learning and sharing relevant information. For guidance on setting-up and facilitating an online learning community, Facilitator #2 reached out early to creators and facilitators of other sites for input. The experience facilitators emphasized that within each online learning community, there must to be something worthwhile to encourage users stay, participate, and contribute new information; in other words they must find value.

When asked about the planning phase for Community #2 the facilitator stated that he did not engage in formal planning but that it “just kind of happened.” He then explained that people are very fluid and that in setting up this environment he wanted it to have the ability to go where it needed to go in terms of what the members of the community wanted or needed. He also wanted to ensure that the site had a practical application for educators in not just sharing an interesting premise but in actually showing educators how to integrate technology into their classrooms for daily educational use. Another primary goal of “planning” for Community #2 was to support conversations about how things worked and how to make them better. The “planning” of this community was primarily a product of implementation of a “fluid thinking” approach where the facilitator would share and integrate new tools and ideas as he came across them and as they seemed appropriate to integrate into the community. This “fluid thinking” approach also impacts his future community facilitation philosophy which he described as, “see[ing] where it goes and if something else comes then maybe we’ll look.”

## **Engagement**

In order to help facilitate engagement in Community #2, the facilitator focuses on specific tactics or actions, building content, and encouraging participation and new

members to join. Despite these actions the facilitator acknowledges that there are several members who only observe (or sit in the background) instead of directly participating.

**Encouraging participation.** There are several tactics that the facilitator utilizes to encourage more engagement and participation in Community #2. He is very involved in linking the Ning community to other social media sites and groups that he has created in LinkedIn and Twitter. A few other tactics that the facilitator employs are developing and launching a podcasting series, a webinar series, and appointing key members to be featured bloggers to create and provide content on a scheduled basis. The facilitator has also created an app (in both the Android and the Apple platform) which keeps members updated on new content and information shared within the community.

Facilitator #2 further focuses on encouraging participation from two different groups: individual community members and commercial or company groups. In the first case to increase awareness of individual community members he posts his community name and a link to the community website on a variety of external websites. Whenever he participates in a webinar, visits another online learning community, or at any other opportunity the facilitator will “drop a link.” Once members have joined the community the facilitator (usually within 24 hours) sends a personal email welcoming the new member and also invitations to his other groups (LinkedIn and Twitter) . Also, the facilitator makes an exerted effort to read members’ content and to post comments to encourage continued participation.

It’s just a matter of you know people want to hear what you have to say and they have to also realize that they have something to say so if you let them know that by reading their contributions and comment on how you like

something that they have contributed, they realize that they have something worthwhile to say as well and that kind of feeds upon itself.

To encourage participation from the commercial groups, the facilitator encourages representatives from these organizations to become members and to create a breakout group within the site where they can educate other members about the product or service they are promoting (he does specifically mention however that commercial communications should only occur within the designated groups and not anywhere else in the community). The facilitator said that he works hard to reach out to companies, inviting them to join, to build connections and possibly offer resources to the other members. A byproduct of building connections between companies and Community #2 is that some (including Prezi and Glogster) have ties and links from their website back to Community #2. This helps to facilitate building an even larger community where information can be shared between multiple groups of people (not just those who are members of Community #2). Further, the openness of this platform provides start-up companies a venue to showcase their products and services.

**Building content.** The facilitator of this community is responsible for sharing a large amount of the content that is available to the community, he mentioned several times throughout the interview that finding enough time to dedicate to facilitating the community is a great challenge for him so he has found several shortcuts to help him share and upload content in the community website. Installing the Diggo toolbar, linking the group to RSS (Really Simple Syndication a web feed used to publish frequently updated information) feeds, and cross-posting blog entries for other sites all help the facilitator reduce the time involved in supplying content.

## **Building culture**

To build culture within the community the facilitator attempts to provide members with what they are looking for. To better understand what members want from Community #2, the facilitator posts queries asking members for feedback through asking very targeted questions. For example, about a year ago he asked members if they would like to have an app to help stay connected with the community. As a result of the positive response to his question, he has now created a community app for members. He also focuses on the benefits that a commercial presence may have in the community in terms of generating revenue as well as offering featured products with free trials and giveaways to members.

**Handling quality issues.** When asked to explain his techniques for handling issues related to the quality of information exchanged; Facilitator #2 responded that he considered himself unique in feeling that everyone has something to offer and it is each person's responsibility individually to determine the quality of that content. Presently, he only limits and censors people who are not contributing something educationally related in an appropriate forum or group within the community. The facilitator explained that once people become members under false pretenses and start soliciting other members inappropriately he simply removes them from the site. However, he encourages contributions from anyone else because he believes that there is a lot we can learn from each other so he typically allows members comment as they wish.

**Sustaining.** Facilitator #2 explains his experience as a facilitator sustaining an online community of practice as "a lot of reaching out to people." He tries to make good connections to new people through articles he has read (reaching out to the subject

and/or the authors of the articles) or people he has spoken to. Fundamentally he believes that if he creates an atmosphere where people realize that they have something to contribute to each other they will engage in discussions which promote the building of community knowledge.

Less than one year after establishing his community the facilitator experienced an unexpected obstacle when Ning made the announcement that their communities would no longer be offered for free. The facilitator explained the options he faced to sustain the community as accepting an offering by Pearson to pay for an educators account (which was just the base minimum and did not allow the community to retain the features and videos), looking for an alternate platform onto which to move the community, or seek sponsorship for the \$600 per year membership. Unexpectedly, Atomic Learning approached him about sponsoring the site for the next five years so the facilitator opted to allow sponsorships of his site. That event opened the door to possibilities of more commercial activities and sponsorships within the site.

### **Generating revenue**

Since establishing the community, there have been several opportunities for the facilitator to generate revenue through the community site. In fact, he has met with a venture capitalist to gain a better understanding of the revenue potential that facilitating Community #2 may potentially offer. The facilitator stated that the venture capitalist projected that the site might be able to make \$100,000 this year which is an amount that does not entice the facilitator to pursue managing the site as a full-time career opportunity. Essentially he says he just enjoys running the site and if he can generate some extra profit in the form of advertising then he is open to exploring that possibility. He offers the opportunity for companies to sponsor and advertise in the community and

with the money that is generated he plans to put it towards future investments for the community (like creating an app). The venture capitalist did however recommend that the facilitator charge a membership fee. The facilitator rejected this recommendation because he felt that the audience as primarily educators might not be willing or able to pay the membership charge feeling that the community was more productive and useful as a freely open community.

### **Managing challenges**

**General challenges.** One of the greatest challenges described by the facilitator, several times during the interview, is finding the time to keep the site going. The tactics utilized to help save time include linking into other social networking groups, using RSS feeds, and cross-posting content.

Another challenge he describes is working with members who felt that they were being solicited by commercial members of the community or members who felt that they were being contacted too often via email. His tactic for dealing with the members who felt that they were being contacted too often was to make them aware of a feature in their profile where they can opt out of emails from the community. He explains that communication is a hard balance to achieve because some members react very positively to all the interaction where others have reacted negatively. His philosophy on when to create and send email messages is driven by content – when he finds something that he believes is beneficial and worthwhile he will share that “even if it means sharing twenty or zero emails daily.”

**Closing philosophy.** When asked when he believes it would be appropriate to close a community, the facilitator responded, “when it gets to be too much for you.” For him personally he felt that he might be ready to move on from the community if



something better came along, if it became too much work to continue to facilitate the community, if it became too expensive or if he was not making enough profit. He also said at any of these instances he might turn it over to someone else who wants to keep facilitating the community. The facilitator says he loves what he is doing right now and has no intentions of changing.

It's something cool; I don't know what it is. It may turn into something great or it just may be something cool. For now it's fun so I'm going to keep doing it.

### **Final recommendations**

Facilitator #2 offers three recommendations to current or future facilitators of online learning communities. First, facilitators should “realize what you are getting into”. He suggests that if you are going to do this wholeheartedly, it is a lot of work in reaching out to other people and belonging to and contributing in other communities with a related focus. Second, he recommends taking a close look at the community that you are proposing to create; if it already exists, look at ways that you can come together and exist as a community in one place instead of duplicating efforts. Finally, from a design and functionality perspective, create a hub or central place where everyone can start. From that hub people can branch out to other related sites and information. Instead if we have a lot of smaller sites serving the same interests, it is a waste of time and resources.

### **Conclusion**

Many online learning communities may be easily found through a quick Internet search however; finding a community that has strong member participation, is designed to support communication and reflection, and promotes the construction of new knowledge through collaborative learning is much more difficult to find. As reinforced by

the literature and research presented throughout this dissertation, the facilitator is an essential component to a successful and sustainable online learning community. The purpose of this chapter was twofold; first to provide a detailed description of each community to identify website design and related features built by facilitators to support member interaction and engagement and second to organize the findings from the facilitator interviews in such a way that the strategies and tactics used throughout various stages of community development can be more clearly identified. What becomes evident through the presentation of these findings is the explicit identification of specific strategies and tactics employed by these facilitators which might be used to inform current or future facilitators in management of online learning communities used in a professional development capacity.

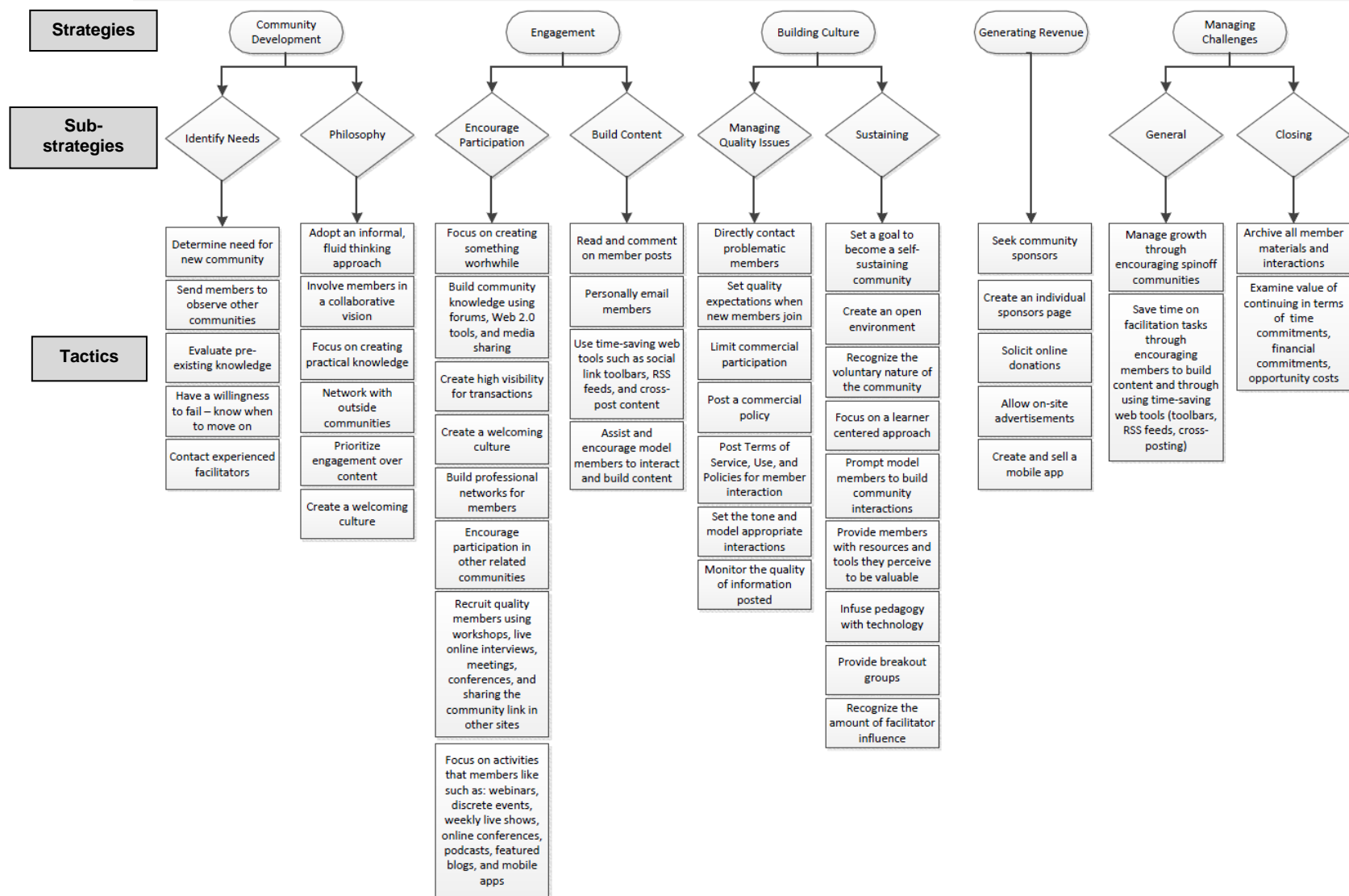


Figure 4-3. Relationship between strategies, sub-strategies, and tactics

## CHAPTER 5 DISCUSSION

### **Introduction**

The purpose of this study was to explore the strategies and tactics used by facilitators to manage online learning communities for professional development and to understand how these factors might be used to construct and support new online learning communities. Online learning communities supporting educator professional development are increasingly emerging and a growing body of research illuminates the potential that these communities may have to improve professional practice (Darling-Hammond et al., 2009; Duncan-Howell, 2010; Flanigan, 2011; Little et al., 2009; Lock, 2006; Smith, 2001). Facilitation is critical in establishing and sustaining online teacher professional development and given the lack of research of the facilitator's multifaceted role; there is a demand for constructing an understanding of the strategies and tactics utilized by current facilitators in management of online learning communities (Gray, 2004; Johnson, 2001; Kimball & Ladd, 2004; Tarmizi, Vreede, & Zigurs, 2006). In order to gain an understanding of these strategies and tactics throughout the life of the community, the interview questions were organized into McDermott's Five Stages of Community Development: planning, start-up, growth, sustaining, and closing. Initial use of this framework helped to insure that the perspective of the facilitator and his associated role was examined throughout all stages of community development.

In chapter four, a description of the selected communities' site elements and design features and an analysis of interviews with community facilitators was presented. The analysis of data provided in the chapter allows examination of similarities and differences between the each community's site as well as organizes the major

strategies, acknowledged by the facilitators during interviews, into sub strategies and tactics. In what follows, the findings of this study with respect to the strategies and tactics utilized by facilitators in online communities of practice used for professional development are discussed in terms of five major strategies which emerged from the research; (1) community development, (2) engagement, (3) building culture, (4) generating revenue, and (5) challenges. Integration of existing research on facilitation of communities of practice into this discussion will scaffold a framework to better support the findings and implications. The chapter concludes with identification of future research in facilitation of online communities of practice.

### **Discussion of Findings**

Learning communities enable professionals to engage in collaborative learning and reflective practice (DuFour, 2004; Palloff & Pratt, 2005) to elicit and share practical knowledge, focus on improving learning outcomes, form new networks, gain support, create an avenue for critical investigation of practice, and improve communication and sense of community (Kaplan, 2002; Kilpatrick, Barrett & Jones, 2003; Palloff & Pratt, 2005; Price, 2005). Online learning communities use networked technologies to enable collaboration (Johnson, 2001) and have the ability to facilitate collective intelligence supporting a common goal (Gunawarda, et al., 2009). Construction of a community which creates capacity and has the ability to promote improved professional practice can be a complicated undertaking however; a skilled facilitator may guide an online community of practice in such a way that it builds and contributes to professional knowledge (Williams, 1999). Separating the facilitators' overall strategies (advanced planning directed towards achievement of long-term or overall goals) and tactics (means to realizing strategy) from the online learning community aided in forming a

framework from which their role and tasks could be better understood. Following each interview, the interview transcripts were reviewed for key findings where actions and philosophies were highlighted and separated from anecdotal conversational and responses. Grouping of the actions and philosophies began to reveal trends in data which informed the codes that were used. Initial groups included identification of needs, networking, engagement, voluntary participation, building culture, building scope, member building, affirming users, background, motivation, encouraging participation, managing quality issues, sustaining actions, and closing. Closer inspection of each of these groups revealed that some appeared to be more important than others and that several shared similar characteristics. After grouping related codes together, five strategies with supporting sub strategies emerged (1) community development (philosophy and identification of needs), (2) engagement (encouraging participation and building content), (3) building culture (handling quality issues and sustaining), (4) generating revenue, and (5) managing challenges (general challenges and closing philosophies).

Each identified strategy is an important viewpoint in understanding the role of the facilitator. First, building an online community of practice is a complex undertaking; despite the success of his current online learning communities one of the facilitators talked about previous experiences where his communities have failed. There are important philosophies and tactics that these facilitators share, stemming from their experience in building large online learning communities being used for professional development, which can inform current and future community facilitators. Next, many of the online learning communities that were considered for inclusion in this study had very

detailed layout and infrastructure for their community pages online however; there was not a lot of sustained member engagement where members of the community were building collegial knowledge. Results of this study are important in outlining some tactics to guide both current and future facilitators in how to encourage members to participate, gain individually from interactions, and produce new knowledge. The third identified strategy, building culture is very closely linked with engagement but goes beyond simply getting members to participate to understanding why members participate and encouraging them to participate more with each other to create a self-sustaining community (this insight is extremely valuable because many online learning communities never become self-sustaining in the ways that are described for Community #1). The fourth strategy, generating revenue, is a reasonable consideration for both current and future facilitators. To some degree both facilitators interviewed for this study engage in some type of revenue generating tactic; these tactics provide considerations that new communities may choose to implement. Finally, it is important to address how facilitators manage challenges since all communities will face challenges in some form. Although the facilitators did not identify many specific challenges, their tactics in dealing with the challenges that they described may serve to inform other facilitators and provide additional viewpoints which may help in solving new challenges.

Within each of the five major strategies that will be discussed various sub-strategies and tactics explaining how each facilitator achieved the identified strategy will not only be highlighted but also relevant literature, from chapter two, supporting these findings will be integrated. This will be done in an effort to clarify how the outcomes of

this study extend to construct and support new online learning communities which may be used for online teacher professional development.

### **Community Development**

The term community development implies notions of building, growing, sustaining, and advancing a community. For the purpose of this study, the overall strategy for community development focus on the initial stages of the community which include: exploration of possibility and desirability (Tarmizi & de Vreede, 2005); establishing common interests and topics (Tarmizi, de Vreede, & Zigurs, 2006); identifying member priorities, interests, and needs; and addressing pre-existing content and issues of domain (Australian Government Information Management Office, 2006). A fundamental goal in the development of an online learning community is to facilitate and disseminate new knowledge; this same goal is applied by economic development professionals in physical community development of a transformational society (Bowen, 2012). Further similarities exist between online learning community facilitators and economic developers in that both are responsible for promoting and sustaining communities and must be able to adapt to dynamic and shifting priorities while accommodating both short and long-term objectives (Bowen, 2012).

### **Philosophy**

McDermott's first phase in community development is planning, both facilitators seemed to interpret planning as an intentional action where the online learning community was prearranged or worked out in advance. Facilitator #1 stated that he did not do any planning but that to him the phrase implied an "advanced understanding" that he feels does not exist within the technological realm of online learning communities. Facilitator #2 also stated that he did not engage in formal planning but



that it “just kind of happened.” McDermott however explains planning from a different perspective, although he uses the term “planning” which these facilitators reject, his description of the term summarizes both facilitators’ community development philosophies by emphasizing the idea that planning should not be too detailed or structured but should instead focus on ways to support development and growth as the community begins to evolve (2000). Defining planning as McDermott does identifies critical tactics employed by these facilitators during community development. Both emphasize the importance of involving the members in a fluid thinking approach (especially Facilitator #2) by guiding them in the building of a community that meets their needs where they can focus on networking and making professional connections. Facilitator #1 approached community development as an idea that he wanted to experiment with using a group to construct a collaborative vision. Many businesses also use collaborative “planning” to accomplish a variety of goals ranging from product development to supply network establishment to generating forecasts and new processes to engaging stakeholders on multiple levels (Danese, 2011; Goldstein & Butler 2010). Often, collaborative planning results in more rich data for decision making which can increase the responsiveness of companies to their customers, employees, or networks (Danese, 2011).

This notion is supported through Facilitator #1’s description of developing a community and recognition of three key factors inherent in social networks: (1) understanding that in education there has been a shift in power from a traditional hierarchical structure to a more distributed structure where education is more learner centered and voluntary resulting in a choice to participate; (2) engagement trumps

content where social networking should address social and sharing needs on a more human level and create new professional connections; and (3) building culture and creating a welcome environment which will establish a culture that becomes self-perpetuating (Wenger & Snyder, 2000).

This philosophy is further implemented through tactics which focus on making connections and reaching out to a variety of professionals from the corporate to the educational sector (primarily using LinkedIn, joining other online learning communities, and through attending webinars and online meetings). Both communities show evidence of linkages to outside social networks as well as collaborations with other online learning communities with similar foci. After making these initial connections, next focusing on how to make the content practical and support conversations about how things work and how to make them better through involving members in discussions that would not have taken place otherwise (Ardichvili, 2003) is significant. Facilitator #2 further emphasized a focus on creating practical knowledge that could be used in everyday classroom applications. Above all, the focus should be on an informal approach utilizing a fluid thinking philosophy where members of the community, converging shared expertise and passion, share a role developing what they want or need (Wenger & Snyder, 2000).

### **Identification of needs**

Analysis of these two facilitators and their online learning communities implicitly suggests that implementation of their community development strategy is a combination of McDermott's (2000) first two phases; planning and start-up. Specifically, identification of needs including member characteristics, expectations, preferences, and

scope of the community (Australian Government Information Management Office, 2006) was addressed by both facilitators through utilization of similar tactics.

Addressing preexisting knowledge, domain, and communities with similar capacities is a critical tactic in community development (Australian Government Information Management Office, 2006). Facilitator #1 recommended having potential new members conduct research to combine an understanding of the depth of preexisting knowledge as well as any identifying any existing communities with a similar focus. In an initial needs assessment, both facilitators advise that creating a new community may not always be the best solution suggesting instead that encouraging participation in existing community may prevent duplication where time and resources may be wasted. Further, Facilitator #2 suggested that it could be advantageous to explore ways to bring communities together to exist as one group or as a hub allowing members to branch out to other related sites and information. Research on decision making in complex organizations emphasizes the importance of evaluating preexisting knowledge and suggests that new processes are shaped through an understanding of preexisting working knowledge which directs how people generally understand problems and seek solutions (Coburn, 2009).

Further, as a tactic to identify needs both facilitators discussed contacting creators and facilitators of other sites. Through these informal contacts it was learned that the most important factor in community development was creating something that was worthwhile for the members that would encourage them to stay, participate, and contribute new information. Facilitator #1 suggested contacting experienced facilitators (as a pioneer in the field, he did not have the luxury of contacting prior facilitators)

however; Facilitator #2 reported reaching out to creators and facilitators of similar sites for guidance and input. In order to build an understanding of what is “worthwhile” for members of these groups, Facilitator #1 suggested that members be sent to various different online communities (at least 20) and then return with a combined knowledge. This combined knowledge and view of member involvement represents a strategic focus on building from the ground up; retaining social emphasis through focusing on members, interaction, and member content instead of tools (Dewey, 1916); and creating a collaborative vision of what must happen as a community (Gunawardena, et al., 2004). The members of the community through their presence are indications of where value and knowledge creation may exist.

Finally, Facilitator #1 acknowledges that there must be a willingness to fail and an ability to recognize when it is time to move on to a new community and endeavor. Leaders in all fields must be willing to take informed risks where risking failure is a crucial component in many successful initiatives (Sharpiro, 1990).

## **Engagement**

Engagement was identified by both participants as a key factor in understanding online learning communities. After thorough examination of literature focused on learning community models, few, if any, discussed actual tools or infrastructure, most focused on engaging in a common mission, shared passion and expertise, collaborative dialogue, commitment to the common good, and addressing member needs for the purpose of constructing new experience and knowledge to improve practice (Department of Education, 2002; Garrison, Archer & Arbaugh, 2007; Gunawardena et al., 2004; 2009; Lave, Wenger, McDermott, & Snyder, 2002; McLaughlin & Talbert, 2006; Palloff & Pratt; 2005). Examination of facilitator interviews revealed a similar

perspective, where the focus was on building value and engaging in tactics that support members which as result will help the community to grow. Facilitator #1 advised that one of the most important lessons to learn is to create something that is valuable to people, otherwise they will not stay and engage in your community.

### **Encouraging participation**

After building an understanding of member needs, the participants emphasized that it is important to utilize tactics which will allow the members to build the community through engagement with each other to build new community knowledge (Fontaine, 2001). Specific tactics to enable better member participation were employed through utilization of forum posts, media sharing, and Web 2.0 collaboration tools which allowed resources to not only be shared but also discussed and improved through collaborative member participation. For example, in both communities the facilitators have created a forum area, allowing members to create an unlimited number of forum topics, where members can not only read information posted by other members but they can also see all interactions and make contributions to the community discussions. Facilitator #1 felt that Ning (or a similar type of platform) is an application that aids in enabling members in seeing value in their interactions and encourages participation through creating high visibility of transactions (activity feeds, forums, and listings).

Recruitment of members to the community is also a key tactic in supporting community growth (Tarmizi & de Vreede, 2005). A primary tactic employed to encourage participation and build membership involves creating a welcoming culture (a culture where members feel comfortable sharing information and where they feel that their input and collaboration is valued) where members may be affirmed through their contributions (Community #1 dedicated an entire page to welcoming new members and

providing new member help). Additional methods used included holding physical events such as workshops, live online interviews, meetings, and conferences or attending events organized by outside organizations and sharing a website link to the community with fellow participants. Following analysis of the two community websites, it was clear through the volume of member participation that these activities were perceived as valuable where both existing and new members actively engaged with one another.

Understanding the value of connecting users to help them build a professional learning network for professional development is key in achieving member participation (Fontaine, 2001). Facilitator #2 emphasized this tactic most; perhaps his emphasis grew from his discovery that networking is less advanced for professional educators, especially in a K-12 environment. Enabling engagement is vital within the community however; interestingly both facilitators also encouraged engagement in other communities and social platforms by leveraging outside community knowledge via linkages with social networks such as Facebook, LinkedIn, Twitter, and other related Ning networks. Facilitator #1 even suggested using his community as a platform for building new communities with similar interests. The use of these tactics by both facilitators highlights an important finding that each acknowledges the value that other, outside, and at times perhaps even “competing” sites may bring to their community. Both facilitators focus on using the community as a professional learning tool which serves to add emphasis to the focus on the individual user, their professional growth, and the opportunity to network. Networking online is a valuable tool in professional development for all industries because it can provide an almost unlimited number of

professional contacts, the opportunity to interact with and assist colleagues outside of typical communication circles, stay current on industry trends, and establish a public profile and an online identity (Jacobs, 2009).

Engaging tactics that facilitators reported receiving positive feedback about included: Webinars, discrete events, weekly live shows, the global education conference, podcasting series, and featured blog posts. In order to keep members better connected to new information being shared in the community, Community #2 has developed an application for members to download and access the community via a mobile platform.

### **Building content**

Where Facilitator #1 focused on engagement instead of building content (posting around one percent of the total pictures and videos in the community and representing thirteen percent of discussion communication), Facilitator #2 is responsible for sharing a large amount of content that is available to the community (posting fifteen percent of the total pictures, fifty-eight percent of videos in the community, and representing thirty-four percent of discussion communication) often commenting that finding enough time to facilitate the community was a challenge. In order to reduce the amount of time required to build content and provide resources, several shortcut tactics were suggested by Facilitator #2: installing a social link sharing toolbar, using Really Simple Syndication (RSS) feeds to publish related news articles and features, and cross-posting content built for other sites. This highlights a divergence in implementation of facilitator presence tactics between the communities. Further, Facilitator #2 reported sending a personal e-mail to each new member of the community when they join and makes a concerted effort to read other members' content and comment on it to.

Despite the differences in implementation, both communities have been recognized as top ten communities (Kapuler, 2011), have been established for five years (Community #1) and three years (Community #2), and have large membership bases that interact on a regular basis which implies that for their members these facilitators have created a valuable resource and networking tool.

### **Building Culture**

Effective facilitators create a culture where inquiry is valued and there is a structure for learning experiences that benefit the community as whole through understanding the goals and common purpose of the community (Borko, 2004). A primary goal, discussed by both facilitators, should be creating a community in such a way that it can become self-sustaining, constantly generating new knowledge which reinforces the members' efforts and the community as a whole (Wenger & Snyder, 2000). Facilitator #1 discussed achieving this strategy within sixteen months of creation by utilizing tactics which emphasize a welcoming philosophy and as a facilitator understanding that the emphasis should be placed more on people instead of technology. Facilitator #2 mentioned that this is a goal for his community however; after three years his community is still working to achieve this goal. Further, Facilitator #1 emphasized the importance of recognizing that the amount of influence exerted by the facilitator determines the tone and tenor of the community. As a community begins to grow, developing breakout groups where members can have deeper discussions on specific topics is an important tactic (Neilson, 2001). Facilitator #1 mentioned large growth as one of the greatest challenges that the community faced and stated that the community might have imploded if it had not been for a breakout group feature as well as his encouragement of other members to create new communities related to breakout



group categories and topics. Finally, it is important to provide members with resources and tools that they feel is important; one tactic employed by Facilitator #2 was asking targeted questions via discussion forums. The combination of these tactics, which McDermott would identify in the growth phase (2000), better enables members to function as a group and thus a community strengthening a sense of commitment and mutual support and encouragement (iTrain, 2005).

In building a strong collaborative culture in an online learning community a facilitator must also recognize that there has been a shift in the traditional hierarchical structures in education where knowledge and power are more distributed and disbursed between members of a community. Researchers exploring physical community building in pursuit of reinventing traditional economic development practices acknowledge the same trends emerging where hierarchies are giving way to interlocking networks (Bowen, 2012).

### **Handling quality issues**

Monitoring the type and quality of information being shared in the community is an important role for a facilitator in establishing knowledge-based trust (Ardichvili et al., 2003). Issues related to negative information exchanges within these communities fall into two general categories: commercial solicitations and inappropriate interactions from a community member. Although both communities are engaged in generating revenue in some way, through their Terms of Service and Commercial Policy, both actively discourage commercialization and explicit solicitation of members. Several tactics may be employed to limit commercial interactions within the community. A tactic used by both facilitators as a preventative measure involved creating a policy statement, posted on the home page, outlining appropriate interactions within the site; failure to adhere to

this policy may result in facilitator removal of the commercial interest (represented as a member) from the site. Another tactic employed by Facilitator #2 involves limiting commercial interests to individual breakout groups by encouraging a company interested in establishing an online presence to create a group where they may discuss their product only with members who are interested. As of May 6, 2012 of the fifty five total groups, twenty-eight were formed by companies with members averaging around seven people. In many of these groups there is one post made by the company with no response; in a few of the groups' community members have asked questions about the product or how to use it in the classroom. Typically, there are not lengthy discussions in these groups.

Managing misinformation and inappropriate interactions is also important in sustaining member participation (Sharratt & Usoro, 2003). Both facilitators explained that posting of misinformation or inappropriate interactions was rare however; each mentioned an incident when this had occurred to help explain the tactic used in dealing with the issue. The Facilitator #1 recommended setting the tone by modeling appropriate interactions and posting public responses to inappropriate interactions as key tactics that facilitators may apply which indirectly encourages other members to help in policing inappropriate comments. In situations where additional measures are required an additional tactic may involve directly contacting the abusive member (by phone if possible). Facilitator #1 emphasized that in these types of situations that the most important thing to remember is to care about the person and help them to understand how to participate and contribute within the community in an appropriate way. The combination of these tactics may result in a better community member whose

behaviors may change as a result of reaching out to them and going the extra mile. It is vital for facilitators to remember that they have an enormous amount of influence and can use that to build better members and direct appropriate community interaction. Further, it is important for facilitators to monitor the quality of information being shared so that members can trust that the community knowledge and resources that are built are reliable. Facilitator #1 also mentioned setting the expectations and guidelines for quality information as soon as the member joins the community. This finding also applies to online communities used in other disciplines; a marketing study conducted on interaction in online communities determined that users' perceived trust in their contacts was positively related to their engagement with the community (Shu-Chuan & Yoojung, 2011). Thus, the member's ability to trust the content and information found within the community is a vital component of engagement.

### **Sustaining**

Communities are dynamic in nature and must have the ability to adapt to change and maintain quality as they mature (McDermott, 2000). In a phase that McDermott would describe as sustaining; one of the most important tactics is to focus on the social aspects which add to pedagogical goals; the learning and sharing of community knowledge transferring to educational technology practices (Wesley & Buysse, 2001). Facilitator #1 emphasized the importance of infusing pedagogical aspects with technology and social aspects in the process of community knowledge building. Facilitator #1 also discussed the importance of recognizing that as online learning communities grow, it is imperative to allow the ability for groups to form and to allow the community the freedom to evolve so that it continues to meet members' needs; not forcing involvement in areas where members find no value. Further, another key tactic

to building real value into the community is finding active members and modeling conversations that will prompt these members to respond to and build interactions with other members. Facilitator #2 stressed creating an open environment where the facilitator continues to reach out to people and build networks to create an atmosphere where members realize that they have something valuable to contribute and will engage in the community which promotes generating new community knowledge. A group analysis of the interplay between large and small groups in social networks found that while people are drawn to the wider social connections that the whole (large group) may offer that they typically seek out a more private place where they feel they can find more privacy, authenticity, and interaction (Rippa, Moss, & Chirurg, 2011).

### **Generating Revenue**

Generating revenue as a component of an online learning community is typically not discussed in most educationally related research articles. However; some research articles that are more business related do explore using online learning communities or social networks as a means for generating revenue (Enders, Hungenburg, Denker, & Mauch; 2008). Facilitator #1 did not discuss any revenue generating tactics during the interview however; review of the community's website reveals that Atomic Learning is a sponsor of the site, using the Amazon search bar provides resources to the site, and there is an area explaining that the community is a free site however users may make a donation in any amount using PayPal to support the site. Facilitator #2 focuses more on the revenue generating aspects of the community, mentioning it at several different points of the interview. The tactics used by the facilitator to support revenue generation include securing sponsors and creating an individual page for each sponsor, allowing companies and schools to advertise on the site, and creating an application for users to

purchase. The facilitator of this community also mentioned that a few complaints have been sent regarding corporate solicitation within this community. Sociology studies conducted on user perceptions and responses in online learning communities suggest that a facilitator should first build a strong sense of group identity and propagate the benefits of using social advertising in order to improve member acceptance (Fue, Li, & Wenyu, 2009). Facilitator #2 has even met with venture capitalists to help get a better understanding of the revenue potential that the community may bring. However; Facilitator #2 mentions that he simply enjoys running the community and at this point in time while it does not fully support his salary, he is open to the possibility of generating revenue from the website.

### **Managing Challenges**

Research of online learning communities has articulated a variety of challenges communities may face ranging from large time investments and sustaining the community through high and low utilization (Gray, 2004), to organizational issues (Wenger, 2001), to dealing with social and human interaction issues (Gunawardena, et al., 2006), to accepting the community as a new source of knowledge and dealing with quality issues (Ardichvili et al., 2003; Sharratt & Usoro, 2003). Tactics to address some these challenges have already been identified as means to achieving the primary strategies described above. There are however several additional challenges and tactics for managing those challenges that have been expressed by the facilitators of the two communities examined. Examining the challenges and recommended solutions offered by these facilitators may help to inform future facilitators in development of new online communities of practice.

## **General challenges**

Surprisingly, growth (a major component to sustaining a community) was identified as a major challenge for Community #1 (66,603 members). A tactic utilized to manage growth began with recognition that conversations might need to occur in other locations and resulted in encouraging members to start their own Ning communities to support the user choice that is such an integral part of the community's culture. A byproduct of implementation of this tactic ultimately may benefit the community by depicting it as a launching pad or springboard for the members to use to support new growth. It is however important to note that Facilitator #1, who suggested this tactic, was being paid by Ning to evangelize the platform and encourage new communities. Corporations have also found that during times of growth constructing smaller groups within the organization helps to define the strategic direction of the organization, solve key problems quickly, transfer best practices, develop professional skills, and help to recruit and retain talent (Regan & Gold, 2010).

Another major challenge acknowledged by both participants was the amount of time required to facilitate the network. Facilitator #2 works for a school district by day and manages his community in the evenings. He discussed the everyday tasks that he completes including sending personalized emails to each new member and making connections with new companies who may sponsor the site or offer resources to members but the item that he reported taking the most time was uploading content. He also mentioned the opportunity costs associated with taking time to facilitate the community in the evening in terms of time lost with family or in leisure pursuits. The two facilitators have divergent tactics for handling this challenge. Facilitator #1 feels that it is important to remember that you do not have to build everything but you should

instead watch and figure out how to assist and encourage members in interacting and building the community, as a result the amount of time spent managing the community was not a major point of conversation during his interview. Facilitator #2 however discussed how taxing his involvement was and shared strategies for saving time through linking into other social networking groups, using Really Simple Syndication (RSS) feeds, and cross-posting content.

### **Closing philosophy**

The final stage in McDermott's community development is closing. When a community no longer serves its primary purpose or is serving no purpose, McDermott suggests that it is time to close the community (2000). Facilitator #1 however strongly opposes this notion feeling that it is never appropriate to close a community because there is an accumulation of knowledge, conversations, and resources over time that constitutes a social contract and should be archived and preserved. The tactic to create an archive to allow the knowledge to continue to be available supports this facilitator's focus on making the community member centric.

Closing philosophies are again a point where the facilitators share two different perspectives. Facilitator #2 felt that it was time to close the community if it "got to be too much," if something better came along, if it got to be too expensive or if not a large enough profit was being generated. This facilitator also mentioned the possibility, in these instances, of passing facilitation of the community along to someone else who might want to keep the community going. These tactics recognize a very reasonable side to facilitation acknowledging the amount of time required, the resources that must be in place to support a group of people of any size, and the opportunity costs that may be involved in engagement in this type of endeavor.

## **Implications for Practice**

Given the increasing need to create educational environments, for teachers, where learning is collegial, interactive, and draws from authentic activities for the purpose of professional development; the findings of this study have relevant implications for new or existing online learning communities established to support teacher professional development.

While online learning communities have existed for some time, understanding of the facilitator's role in aligning communities with their goals and purposes in order to make them more effective and sustainable is an emerging body of research (Tarmizi, Vreede, & Zigurs, 2006). The results from this research identify best practices in areas of strategies and tactics utilized by facilitators to manage online learning communities for professional development. The implications will address the strategies and tactics used by facilitators for three key stakeholder groups: facilitators of online learning communities, online learning community members, and educational researchers.

### **For Online Learning Community Facilitators**

The findings of this study have a number of important implications for future practice of online learning community facilitators. Based on findings related to the strategies and tactics employed by the facilitators who participated in this study, it appears that several relevant implications have emerged within each of the five identified strategies; (1) community development, (2) engagement, (3) building culture, (4) generating revenue, and (5) managing challenges. A primary theme which must be interwoven into each implication explained within individual strategies below is a dedication to individual members focusing on finding ways to meet members' needs and provide value.



## **Community development**

These findings enhance understanding of the importance of the facilitator in the community development stage. Facilitators must select an online platform enabling the community design of the online learning community to utilize Web 2.0 collaboration tools with the ability to allow authorship and participation for all members. Selection of a platform permitting these collaborations serves to support transparency within the community and allows the community to build itself through collegial interactions, communication, sharing of resources and ultimately building new knowledge related to daily teaching practice. As one facilitator explained, “it is using the community to build the community.” As further extension of the community building community concept; after selection of an online platform it is critical to allow members to guide the remaining community development where the facilitator coordinates organization, implementation of tools, development of community usage agreements, and sharing of resources based almost strictly on member feedback in a ground up not top down approach. Finally, in consideration of community development it is critical for a facilitator to employ strategic leadership where he or she is actively involved in linking members, organization, and promoting interactions supporting community knowledge development.

## **Engagement**

Following community development endeavors, integration of tactics to engage members is a vital component of managing online learning communities. As identified above, an overall implication that impacts each strategy and is key in consideration of engagement is a primary focus on the members of the community. A community that experiences high levels of member engagement is one that is focused on the member not the tools or the content and aims to make a difference in the lives of its members.

Beyond that focus it is important for a facilitator to have strong networking capabilities where he or she may reach out to potential new members, community partners, or key stakeholders through various events, networks, or existing contacts. Lastly, events and activities such as webinars, live events (conferences or meetings), blogs, podcasting, collaborative projects, and interactive mobile applications encourage members to be more actively engaged in the community.

### **Building culture**

Another important focus and thus strategy for a facilitator is building culture within the online learning community. Vibrant communities where collegial knowledge is built focus on creating a culture which values inquiry and collaboration through member engagement. The facilitator also ensures that the exchanges in the community support the collaborative goals and the common purpose of the community (Borko, 2004). Further, the structures of these communities are flat as opposed to hierarchical in nature where members engage on the same level regardless of title or position outside the community. As a part of building and understanding the culture within the community it is also vital for the facilitator to understand and appropriately use the prodigious power that he or she has to influence not only individual members but also the entire community. Effective facilitators channel this power to support the collaborative vision of the community.

### **Generating revenue**

Generating revenue is an opportunity which facilitators may choose to utilize if it is appropriate within their community. Revenue may be generated to support the community (or for the good of the entire community) or it may be generated specifically by and for the individual facilitator. Creating unique partnerships with key corporate

sponsors may be an advantage for the entire community in terms of new resources or tools which may be made available, financial assistance to support the community platform, or dissemination of new proprietary knowledge. In a community focused on teacher professional development, partnerships with commercial entities should be approached and managed carefully so that members do not feel that they are constantly being solicited but instead these partnerships should be setup in such a way that they are integrated into the culture, supporting the collaborative goals of the community and commercial interactions should be monitored by the facilitator.

### **Managing challenges**

Further, a facilitator's response to and management of challenges is vital to sustaining an online learning community. As communities begin to develop and emerge, growth is an unavoidable outcome; typically community growth is an indication of an efficient and successful community however dealing with growth can be challenging. To manage growth a facilitator first should ensure that breakout groups are created within the community so that members may more easily find outlets to interact on specific topics. Also, if the community is strong enough it can serve as a catalyst for either creating new communities with related interests or combining existing communities and resources to create a clearing house to leverage the collegial knowledge of multiple communities. Further, community growth implies new management and time requirements required by the facilitator. Research from this study reveals that experienced facilitators seek additional support from a variety of sources including tasking current community members with increased responsibilities in a host type of role as well as utilizing technology by using automatic posting feeds and cross-posting materials. Finally, it is important that facilitators of online learning

communities embrace the possibility of failure; building a new community involves risk and many facilitators have experienced failure in initial communities. The value of these failures and willingness to fail is openness to learning from each new venture and introducing strategic and calculated risk which may support and sustain the community in new and innovative ways.

### **For Online Learning Community Members**

The findings of this study also have important implications for the members of online learning communities. The size, longevity, and collegial knowledge outputs of the communities evaluated in this study indicate the power of online learning communities as a tool for professional development in collaborative learning and reflective practice enabling construction of new knowledge to improve practice in daily teaching applications providing a practical professional development outlet for educators. Further, the voluntary nature of these communities and the continued presence of their members indicate that benefits and value exists within these types of learning communities. Teachers stay and participate in these learning communities because they find it a meaningful tool to improve their professional practice. To make communities more successful; members of online learning communities which support teacher professional development must be active in these communities, make their wants and needs known to the facilitator (making it clear what is valuable to them), and continue to support new collegial knowledge creation.

Online learning community members should also use their community's to influence and build their support networks (colleagues, tools, resources, experts, businesses). The collegial nature of the Web 2.0 tools, often found in online learning communities, provide an ideal platform for supporting professional development through

building a wider professional learning network. Doing this allows social networking to address social and sharing needs which engages both members and facilitators on a very human level.

Finally, this research supports the idea that educational opportunities are increasingly open and more readily available to all types of learners. No longer is education (even professional education acquired in a professional development environment) offered within four walls, from a single authority or teacher, top-down, and at a high cost. Education is now more free, open, and available where hierarchies are shifting to allow for more flat, bottom-up educational structures and opportunities. Current and potential new members of online learning communities must seek these and take advantage of these new learning opportunities; especially teachers who can connect with other teachers to help improve professional practice and student learning.

### **For Educational Researchers**

The findings of this study suggest a set of implications relating to pedagogical practices and research. On a very fundamental level, these communities provide a valuable framework which should be examined as a possibility to initiate a new design for teacher professional development utilizing technology and online models on school wide, district wide, or even state wide levels addressing specific, local needs.

Also, online learning communities introduce ways for educational administrators to address 21<sup>st</sup> century literacies among faculty and promote ways to advance innovation and teaching despite financial restrictions. The communities examined in this study provide viable, low-cost models of professional development which may aid in achievement of these goals whose possibilities should be examined for integration into current professional development requirements. Further, it was found that members

only stay and participate in communities where they find value. It would be beneficial for educational administrators and researchers to examine these communities and similar communities used for educator professional development to gain an understanding of what educators want and value in areas of professional enrichment. This may provide guidance on what teachers need since communities are driven by member wants and needs.

The essence of this research suggests that technology can be successfully integrated into educator professional development in an online learning community framework. The large memberships of the communities evaluated indicate that many teachers find this form of professional interaction enriching on many levels: personal, professional, and even emotional. Educational administrators and researchers should explore making teachers aware of existing groups and opportunities and support them as legitimate professional development alternatives.

### **Application of Strategies and Tactics for Emerging Communities**

The findings from this study have direct application in the construction and support of new online learning communities. A salient factor that emerged from the data was the realization that the role of the facilitator within stages of community development was less important than application of broad strategies (overarching community objectives) throughout all stages of development. For example, McDermott (2000) identifies recruitment strategies as instrumental to the start-up and growth phases whereas both of the facilitators of these communities utilize the tactic of recruitment as method of supporting the overall strategy of engagement to encourage participation throughout the entire life of the community. Additionally, McDermott suggests that identifying member needs is a task related to the start-up stage whereas both interviews

and site analyses revealed that as part of an engagement strategy facilitators should continuously analyze member needs. Further, in the growth phase, McDermott suggests that the focus becomes expanding members' exposure and network whereas both facilitators in this study responded that creating professional learning networks for the members was essential in providing value to both the member and the community. In other words, data derived from this study provided evidence that an explicit list of facilitation strategies and tactics that align with McDermott's Five phases cannot be identified at each phase of community development, instead the identified strategies and tactics have more broad application throughout the life of the community.

At this point, it is important to acknowledge that communities, whether live or online, advance through recognizable phases of development similar to the stages suggested by McDermott (2000). However; these phases appear to be more descriptive of the development of the members and community itself rather than related to the strategies and tactics utilized by a facilitator. Suggesting a hierarchy of facilitation strategies independent of the phases of community development does not imply that these phases do not exist, it simply serves to remove restrictions of facilitation strategies and tactics within recognized phases, allowing them to become best practices across the life of the community.

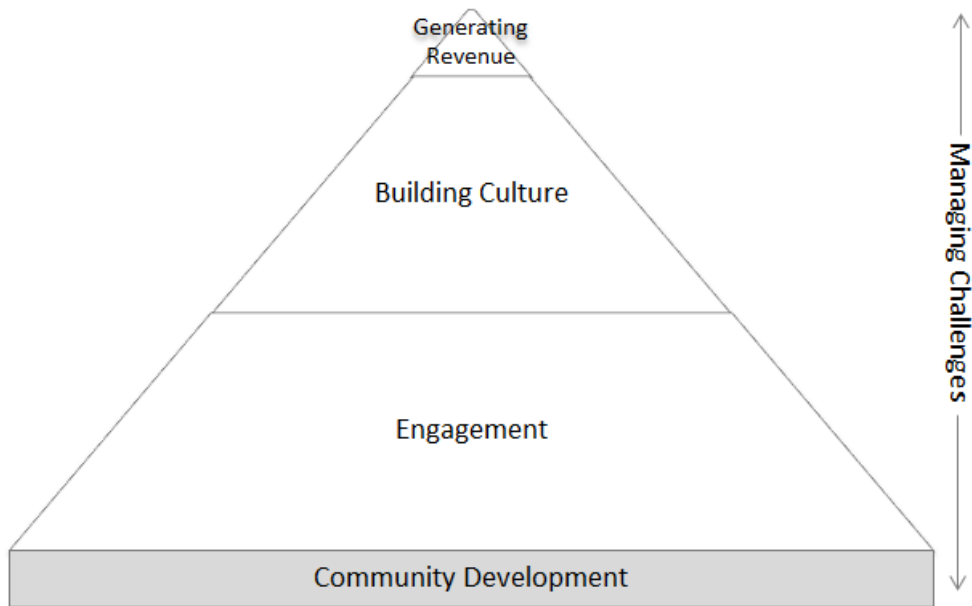


Figure 5-1. Hierarchy of facilitation strategies

The primary strategies emerging from this research may be organized into a hierarchy indicating order of importance within an online learning community. The hierarchy begins with community development as the foundational strategy. Community development is the foundation of the hierarchy because the primary focus of this strategy is establishing the community. There are many tactics associated with this strategy that are unique to community establishment: determining need, sending members to other communities to collect information, and contacting experienced facilitators. Interestingly there are several tactics associated with this strategy that must be performed not only at the beginning and creation of the community but throughout the life of the community: evaluating outside information, adopting a fluid approach, including members in a collaborative vision, focusing on practical knowledge creation, networking with outside communities, prioritizing engagement over content, and creating and sustaining a welcoming culture. A key factor in community



development is recognition that focus on the member is critical. The member must be involved in not only the establishment but the evolution of the community through engaging them in the associated tactics. The next two levels of the hierarchy, engagement and building culture are critical strategies (as indicated by their size) to implement in facilitation of online learning communities. Engagement, specifically, engagement to encourage participation is essential throughout the life of the community. In this strategy the facilitator is focused on creating value and encouraging members to become active in the community. The focus of this strategy should be on building user value. Both facilitators (specifically Facilitator #1) acknowledge that if you do not create and provide something of value then members will not stay and participate in the community. For example, the vibrant and active community associated with #1 provided users with the opportunity to receive diverse feedback on questions and ideas posted within forums. Other primary foci of this strategy should be on building professional learning networks for the members and building community knowledge. These foci are supported by the facilitator through creating a welcoming culture, encouraging participation, enabling high visibility of member interactions, recruiting quality members, and offering events and resources in which the members find value. From this perspective, community building in an online professional learning community is quite similar to community building in an online course (Rovai, 2002). Again, all of these tactics are executed throughout the life of the community (including recruitment which is typically thought to be a start-up type of tactic but is crucial in continuing to bring new members, resources, and perspectives into the community). Building content is a less important sub-strategy within the overall strategy of engagement and if not

done correctly can even alienate members. For example, while Community #2 does offer many important resources to the community, the facilitator admittedly dedicates considerable time and effort to building content. This focus on content construction has unintentionally centralized knowledge and power within the community. This has resulted, whether intentionally or unintentionally in a community with a high locus of control vested in the facilitator. A key tactic in promoting community production and dissemination of content is assisting and encouraging members to interact and build content which in turn increases the sustainability of the community's culture.

Establishing a prosocial culture is another essential strategy that a facilitator must engage. Facilitator #1 emphasized the importance of creating a welcoming culture which would engage the members. Again, with similarity to online classrooms, building culture focuses in two primary areas: maintaining quality interactions and building a culture of sustainability (Rovai, 2002). Quality interactions related to member interactions are heavily influenced by modeling desired behavior within the community but also in genuine interest in caring for others. Setting terms and conditions for membership is also important, however, a key factor is the focus on members. To this end, commercial interactions, that is, interactions promoted or lead by software vendors or other outside institutions, are also an important quality consideration. Facilitator #2 has creatively incorporated these interactions in the community by allowing commercial presence within the site in restricted areas. But this facilitator has not done quite enough on both the main home page and in other areas of the site to ensure that members do not feel that they are constantly being solicited. Facilitator #1 is on the opposite end of the spectrum and has almost no commercial influences and promotes a very restrictive

policy on the home page regarding commercial interactions on the site. This policy may be too constrictive, potentially hindering members' ability to choose to have exposure to products, services, or resources that may be offered which are educationally relevant.

Building a culture of sustainability may lead to the ultimate goal, self-sustainability, through execution of various tactics. Facilitator #2 has laid the groundwork to help his community achieve self-sustainability by providing important resources, creating an open environment, and offering breakout groups. But there are several additional tactics being employed by Facilitator #1 which if utilized might help Facilitator #2 achieve his goal of self-sustainability. Facilitator #1 has supported a self-sustaining culture through recognizing and establishing a connection between social, technological, and pedagogical goals, distributing knowledge amongst users and empowering members of the community, and building interrelationships between members to support new dimensions of engagement (no longer just facilitator to member but member to member). The topmost level of the hierarchy, generating revenue, should only become a facilitation strategy once the community has enough structure to support and warrant commercial involvement. Generating revenue is placed at the top of the hierarchy, as a smaller strategy, because it should only be addressed once the community is developed and mature. Facilitators of technologically enabled communities must recognize the cost that is associated with the community from simply purchasing site space to creating live events such as webinars and conferences to even daily management tasks. Generating revenue through securing sponsors or donations can be important tactics which help to support the infrastructure of the community. Additionally, a commercial presence may be beneficial for the members in areas of exposure to relevant products

and services in the marketplace whose inclusion may better support classroom learning and activities. Facilitator #2 does an excellent job of acknowledging this factor and helping to enable the benefits that this strategy may bring to the community through not only exposure but also resources, free trials, and discounts. Facilitator #2 fails to limit commercial influence within his community, in fact, his revenue generating focus is a prominent thread that permeates his responses to interview questions. For better or worse, this revenue generating focus has become a salient component of his learning community's personality. . A less commercialized focus might allow commercial entities to create breakout groups and limiting their interactions to those groups is a creative way to allow their presence within the community. A home page heavy with advertisements and solicitations for future advertisements is not. Clear understanding and careful assessment of the needs and wants of the members of the community is critical to implementation of a revenue generation strategy that does not overwhelm the users and subvert the online culture associated with a learning community.

The strategy of managing challenges is important to engage at all levels of hierarchy and throughout the life of the community. Day to day facilitation of a community will provide unique challenges for the facilitator to respond to and manage. Although both facilitators reported few specific challenges, careful analysis of responses throughout the interview provided evidence of obstacles ranging from financial issues to growth management to combating time constraints.

Tactics related to managing challenges extend to support all levels of the facilitation strategy hierarchy. Figure 5-2 aids in connecting explicit tactics to the strategies outlined in the hierarchy.

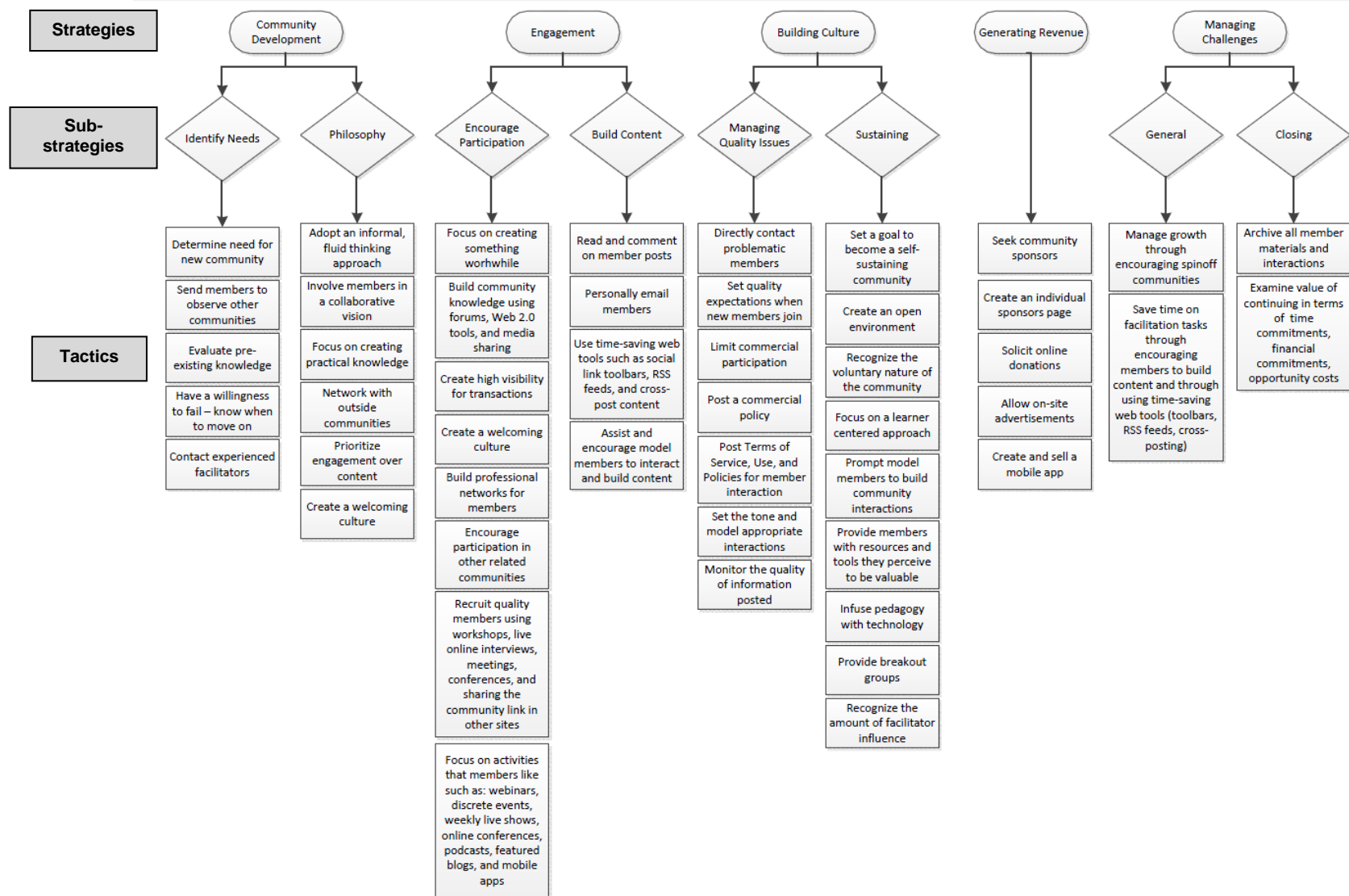


Figure 5-2. Relationship between strategies, sub-strategies, and tactics

The role of the facilitator may change slightly dependent upon whether the community is newly created or an established community however; with few exceptions (initial community set-up, exploring need in establishing the community, and other one-time set-up tasks) the facilitator should be executing these strategies and tactics throughout the life of the community (not just within a developmental phase). Further, it is important to recognize that the level of facilitator engagement will likely change depending on the community's stage of development. A new community will require much greater time and effort than an established, self-sustaining community, but the actual tactics that support the community strategies should still be employed.

Application of the strategies and associated tactics within this hierarchy may differ dependent upon the community, membership and context of the community. The fundamental consideration throughout implementation of each strategy is a focus on the members, given that the membership base of each community is uniquely distinct, the selection and application of each strategy and tactic for a given community will be unique. The hierarchy, however, recommends a framework and progression in facilitation strategies and tactics for new communities based on the findings of this study.

### **Future Research**

There is limited research on the subject of facilitation (Tarmizi, Vreede, & Zigers, 2006). Further, there is only a narrow body of research on the subject of online learning communities with many areas yet to be studied (Darling-Hammond et al., 2006; Gray, 2004; Sprague, 2006).

## **Exploration of Member Perceptions of Value**

Throughout this study, each facilitator emphasized the idea that members of online learning communities will only stay and participate if they perceive it to be valuable but did not expand on exactly what was valuable and how they as facilitators determined what members deemed as valuable. Additional exploration into what community members find valuable and exploring the perspective of the community member to discover why they participate and stay in the community would provide new knowledge to support understanding of strategies and tactics employed by facilitators of online learning communities. Further, much emphasis was placed on focusing on the member which for existing or new facilitators can be very intuitive advice however; it may be valuable to explore in greater detail best practices related to how facilitators place emphasis on individual community members. Exploration of these issues would better inform facilitators on specific tactics to emphasize members and engage them in ways that they find valuable.

## **Factors of Self-Sustaining Communities**

Additional research may be useful in examining exactly how and why some online learning communities experience growth and establish a self-sustaining culture while others do not. For example, the facilitator of Community #1 reported that the community was able to establish a self-sustaining culture within the first sixteen months when the goal (establishing a self-sustaining culture) of Community #2 for three years has been the same but has not been accomplished. As a result Facilitator #2 must spend a lot more personal time facilitating the day-to-day duties and member interactions than Facilitator #1. Exploring facilitator strategies, tactics, and external



situational factors would extend existing research to guide interactions in current and future online learning communities.

### **Examining Stages of Online Learning Community Development**

Previous research examining the development online learning communities is sparse; in fact for this study McDermott's phases of community development were constructed for a face-to-face learning community. Facilitator #1 suggested that he did not feel that the identified stages appropriately captured the stages of development for an online learning community. More in depth exploration of new stages of community development, unique to an online learning community, may help to better define the role of the facilitator and the strategies and tactics utilized at each phase.

### **Limitations of this Study**

Online learning communities such as the communities described in this study, are relatively new instruments being used for teacher professional development. Due to this factor, expertise in the field of facilitating online communities of practice used for professional development has not yet been clearly defined through research thus the strategies and tactics discovered in this study cannot be directly linked to previous research. Further, this study utilized a purposive sampling approach selecting two communities therefore the list of strategies and tactics found in this study should not be considered exhaustive and it should be assumed that there are additional strategies and tactics utilized by expert facilitators.

### **Conclusion**

This dissertation has demonstrated that efficient, sustainable online learning communities that promote learning and improve practice are greatly aided by an innovative and intuitive facilitator. One could prognosticate that an innovative and

intuitive facilitator is a necessary component of a sustainable online learning community. An effective facilitator is dynamic and can manage administrative duties, provide technical guidance, monitor financial responsibilities, and even act as a counselor. There are many faces of a facilitator and gaining an understanding of the strategies and tactics employed by experienced facilitators during the many stages of community development will help facilitators of current or future online learning communities to implement best practices to promote more effective and sustainable communities. Beyond simply creating, maintaining, and supporting an online community as a social outlet a truly effective facilitator understands his or her role as a professional development facilitator in building a community of scholars who construct collegial knowledge. Through this study, an understanding of the strategies and tactics used by online learning community facilitators was formed through application of research methodology focused on the perspective of the facilitator and his perception of his role in the online learning community. The outcomes of this study reveal five major strategies, eight sub strategies, and many associated tactics that experienced facilitators use to manage online learning communities used for professional development. The findings of this study have relevant applications to both current and future facilitators of online learning communities, members of online learning communities, and educational administrators and researchers. In this chapter the discussion and analysis of the findings offer insight into replicable trends of collegial knowledge building and sustainability in well-established communities.

APPENDIX A  
SAMPLE OF INTERVIEW REQUEST LETTER

Dear <Facilitator Name>,

I am a doctoral candidate at the University of Florida in the Educational Technology program. I am currently working on my capstone project where I am interested in gaining an understanding of the strategies and tactics that facilitators use to manage online learning communities in a professional development capacity and how these factors might be used to inform, construct, and support new communities.

After conducting research to identify communities, your community stood out as a vibrant community where members are active and meaningful content is shared and available in ways that improve professional practice. I believe your perspectives and experiences from a facilitator's point of view will be instrumental in gaining an understanding of a facilitator's role in a thriving, meaningful community.

Would you be interested in contributing to this research study by participating in an interview conducted and recorded using Skype™? I would like to ask questions about your background, phases of community development, and your recommendations to other facilitators. If you have an interest in being part of this study, please email me your contact information and some convenient times for you when we can schedule an interview.

Thank you for your time and consideration, I look forward to hearing from you.

Regards,  
Kris Kelly Frady

## APPENDIX B INTERVIEW QUESTIONS

### Background

- How would you describe your background?
- What was your motivation to facilitate your present community?

### #1 Planning

- During the planning phases of the community, what were the most important foundational elements and structures to support community building and to scaffold future learning?
- Since your community has become more developed has the importance placed on those original foundational elements changed? If so, how?

### #2 Start-up

- As you built community structure how did you recruit members and communicate the values of the community?

### #3 Growth

- How do you support and encourage motivation with respect to information exchange within your community? What are some specific strategies used?
- Do you have issues with the quality of information exchanged? If so, what are your techniques for handling issues related to information exchanges?

### #4 Sustaining

- Describe your experience as an online facilitator.
- What do you do that your members like?
- Have you done anything that has made members angry, upset, or irritated? If so, what?
- As your community has grown, how do you accommodate shifting interests to maintain momentum through changes in membership, technology, and information exchanged?

### #5 Closing

- Many communities experience challenges, some of which may prompt the closing of the community. What are your community's greatest challenges? How do you address these challenges?
- When do you believe it is appropriate to close a community?

### Recommendations

- What are your recommendations to other (current and future) facilitators?

- Are there specific research studies and writings that you have found helpful in aiding your understanding of community facilitation?

APPENDIX C  
SITE ANALYSIS RUBRIC

Table C-1. Site Analysis Rubric

Item Analyzed	Present	Somewh at	Present	Not	Applicabl Not	Researcher Comments
General Site Layout – Visible Feature description also explaining structure						
Discussion Boards						
1. Chat or discussion features don't show generic links but have actual discussion topics						
2. Topics are meaningful to the purpose of the group, not cursory (i.e. purposeful interaction)						
3. Members participate in discussions						
4. Facilitator presence is noticeable in discussions						
5. Various discussion topics are available and are either updated regularly or closed when no longer being used						
Media						
Pictures and Graphic Design						
6. Uses graphics to show real content, not just decorate the page						
7. Labels graphics and photos if their meaning is not clear from the content of the story they accompany						
8. Photos are appropriate for the display size						

Table C-1. Continued

Item Analyzed	Present	at	Somewh	Present	Not	Applicabl	Not	Researcher Comments
9. Limits font styles and other text formatting, such as sizes, colors, and so forth on the page because over-designated text can actually detract from the meaning of the words								
10. Uses high-contrast text and background colors so that type is as legible as possible Other Media Files								
11. Audio files are used on the site								
12. Video files are used on the site								
13. Other media formats								
Help								
14. User assistance is easy to find and available for members who need help or who have errors								
15. Help manuals and/or how-to topics are available								
Member Information								
16. Site is restricted to members only								
17. Includes profile pages								
18. Site includes a "Privacy Policy" link on the homepage indicating how member information is shared or not shared								
19. Standards of behavior are posted or are communicated to members								

Table C-1. Continued

Item Analyzed	Present	Somewh at	Present	Not	Applicabl	Not	Researcher Comments
20. Links to members alternate sites (blogs, research pages, etc...)							
21. Breakout groups are provided within the larger group							
22. Members of the site appear to be interacting with each other (not only the facilitator)							
Ratings and Awards							
23. Has received specific ratings/awards/recognition							
Communicating the Site's Purpose							
24. Shows company name and/or logo in a reasonable size and noticeable location							
25. Includes a tag line that explicitly summarizes what the site or company does							
26. Emphasizes what the site does that is valuable to the member							
27. Emphasizes highest priority tasks so that users have a clear starting point on the homepage							
Communicating Information about the Group							
28. Includes a homepage link to an "About Us" section that gives users an overview about the company and links to any relevant details about your products, services, company values, business proposition, management team, and so forth							
29. Includes a "Contact Us" link on the homepage that goes to a page with all contact information for the company							



Table C-1. Continued

Item Analyzed	Present	Somewh at	Present	Not	Applicabl Not	Researcher Comments
30. Provides a “Feedback” mechanism, specifying the purpose of the link and who will be reading submitted information Content Writing						
31. Avoids redundant content						
32. Refrains from using clever phrases and lingo that make people work too hard to figure out what is being said						
33. Uses consistent capitalization and other style standards						
34. Spells out abbreviations, initialisms, and acronyms, and immediately follows them by the abbreviation Revealing Content Through Examples						
35. Uses examples to reveal the site’s content, rather than just describing it with links to examples Archiving and Accessing Past Content						
36. Makes it easy to access anything that has been recently featured on the site Links						
37. Differentiates links and makes them scannable						
38. Doesn’t use generic instructions, such as “Click Here” or “More…” as link names						
39. Allows link colors to show visited and unvisited sites						
40. If a link does anything other than go to another web page (such as linking to a PDF file, launching an audio or video						

Table C-1. Continued

Item Analyzed	Present	Somewh at	Present	Not	Applicabl Not	Researcher Comments
player, or another application) it explicitly indicates what will happen Navigation						
41. Primary navigation area is located in a highly noticeable place						
42. Similar items are groups in the navigation area						
43. There are not multiple navigation areas for the same types of links						
Search						
44. Gives users an input box on the homepage to enter search queries (not just a link to a search page)						
45. Provides a simple search on the homepage with a link to an advance search or search tips						
46. Search on homepage searches entire site by default						
Technical Details						
47. UI widgets are clickable, clearly labeled, and do not detract from site						
48. Window title clearly labels the site's name						
49. URL includes the group's name and is clear and easy to use						
50. Integrates content with other sites (Facebook, Twitter, etc...)						
News and Press Releases						

Table C-1. Continued

Item Analyzed	Present	Somewh at	Present	Not	Applicabl Not	Researcher Comments
51. Headlines are succinct, yet descriptive						
52. Headlines are linked to full news stories						
Advertising and Donations						
53. Site contains external ads						
54. Site solicits visitors for donations						
Dates and Times						
55. Shows dates and times for time-sensitive information only						
56. Content is relevant and updated frequently						
57. Activity occurs on site frequently						
Resources						
58. Has free offers for members (ebooks, publications, reports, etc...)						
59. Resources are meaningful and relate to the purpose of the group						
60. Resources are timely and updated often						

## APPENDIX D INFORMED CONSENT

### **Informed Consent**

**Protocol Title:** The Effect of Facilitation in Online Learning Communities in Educational Professional Development

**Please read this consent document carefully before you decide to participate in this study.**

#### **Purpose of the research study:**

The purpose of this study is gaining a better understanding factors utilized by facilitators in the management of online learning communities.

#### **What you will be asked to do in the study:**

Upon agreement to participate in the study, an interview time will be established, and an interview will be conducted. Interviews will consist of five primary pre-written questions (which will be emailed prior to the interview) with the addition of follow-up questions to further probe responses given during the interview. Also, in order to create a more rich description of your background as a facilitator, questions will also be asked about background and future recommendations. It is possible that a follow-up interview or set of interviews may be necessary, if so, you will be asked to participate in a second interview following the same protocol as above. During this interview, the research may seek to clarify responses made during the first.

#### **Time required:**

1 hour

#### **Risks and Benefits:**

There are no anticipated potential risks anticipated with this research project.

#### **Confidentiality:**

The name and identity of the participants will be kept confidential at all times.

#### **Voluntary participation:**

Your participation in this study is completely voluntary. There is no penalty for not participating.

#### **Right to withdraw from the study:**

You have the right to withdraw from the study at anytime without consequence.

#### **Whom to contact if you have questions about the study:**

Kristin Kelly, Doctoral Candidate, University of Florida College of Education, Department of Curriculum and Instruction

Erik W. Black, PhD, Assistant Professor, College of Education, Department of Curriculum and Instruction

**Whom to contact about your rights as a research participant in the study:**

IRB02 Office, Box 112250, University of Florida, Gainesville, FL 32611-2250; phone 392-0433.

**Agreement:**

I have read the procedure described above. I voluntarily agree to participate in the procedure and I have received a copy of this description.

Participant: \_\_\_\_\_ Date: \_\_\_\_\_

Principal Investigator: \_\_\_\_\_ Date: \_\_\_\_\_

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