Guidelines for Effective Conferencing
  for Organizers, Reference R1044
DOC:R1044*P
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INTRODUCTION

Electronic conferencing is being used extensively at The
University of Michigan. The Computing Center supports two
conferencing programs on MTS: Confer II (tm) from Advertel
Communication Systems, Inc., and *FORUM. Both are used to
support instructional use, program and project planning,
staff communication, discussion on current events and
issues, and many, many other activities.

Learning the technical aspects of managing a conference is
only part of what it takes to make conferencing a
successful experience. This guide was written to help
instructors and organizers understand the nature of
electronic communication and the role they can play in
creating an electronic community.

This guide assumes a basic knowledge of MTS, which is
necessary for successful conference organizing.

The Computing Center has developed a parallel guide to this
one for conference participants. If you do not have one to
copy and distribute to your conference participants, you
can get it on MTS (UM or UB) in the DOC:R1045*P file.
Encourage conference participants to read this guide.

WHY USE ELECTRONIC CONFERENCES?

Electronic conferencing can be a wonderful way to encourage
your students or colleagues to share ideas. A conference can

- capture the excitement, informality, and spontaneity of
  face-to-face discussions.

- encourage participants to formulate questions that
  interest them and answers that satisfy them.

- facilitate easy response, so participants receive ample
  feedback from you and other participants. Because the
  electronic conference is a written medium, participants
  have the leisure to think through their entries and
  express themselves clearly.

- allow people to participate as much as they want, without
  interruption. You and your students or colleagues can discuss
  many topics at the same time; separate discussions cannot
  interfere with each other. This feature allows you to monitor
  the progress of separate, "simultaneous" group discussions or
  projects as fully as you like.

- keep a permanent record of discussions that you and your
  students or colleagues can refer to at any time. You can
  print a hardcopy of discussions that interest you most,
  instead of taking notes.

- allow shy people or foreign participants to express
  themselves more easily. Conferencing offers these
  individuals an opportunity to fully participate.

- help individuals develop critical thinking and
  communication skills.

GETTING STARTED

Running a conference requires that you set goals, plan
activities and your own involvement, clarify expectations
for participants, acquire training for yourself and the
participants if necessary, and set behavioral norms.

1. SET WORTHWHILE GOALS

    Some examples of conference goals are:

    - to extend valuable classroom or work group
      discussions.

    - to allow for role-playing.

    - to allow students and co-workers to get to know
      each other better.

    - to help students develop critical thinking and
      communication skills.

    - to provide an alternative forum for shy people and
      foreign participants.

    - to allow colleagues to discuss projects between
      meetings.

    - to develop joint projects when those involved cannot
      physically meet.

2. PLAN FOR ACHIEVING GOALS

    For example:

    - to encourage critical thinking, ask students to
      develop questions, offer comments and answers. You
      might require a certain number of entries per week.
      Give feedback that lets them know what you think of
      their contributions.

    - to encourage participants to become acquainted with
      each other, start items asking them to share
      information about themselves (where they're from, what
      they like, what they expect from the class or project,
      etc.)

    - to extend classroom or work group discussions, enter
      items related to the discussions yourself, rather than
      waiting for your students or coworkers to do it.

3. PLAN SPECIFIC ACTIVITIES AND ITEMS

    - Count on being responsible for quite a bit of the
      action.

    - Plan the activities you want to pursue on the
      conference, and compose some initial items. If there
      are participants in the conference who are familiar
      with conferencing, ask them to compose some items too.

    - Plan to enter fun items, such as discussions of
      sports, politics or whatever "outside" topics people
      seem interested in.

    - Include ice-breaking items: ask people for their
      favorite funny story, about their favorite hobby
      or why students took your course.

4. ACQUIRE TECHNICAL TRAINING

    The Computing Center offers workshops, documentation,
    and consulting on the use of electronic conferencing
    for organizers and participants. Advertel
    Communications, Inc. has produced _The Beginner's Guide
    to Confer II_ and _The Organizer's Guide to Confer II_.
    The guides are available for printing online in the
    CNFR:BEGIN.GUIDE and CNFR:ORGAN.GUIDE files on both
    UM-MTS and UB-MTS. Call 764-HELP for information on how
    to print these files. Documentation for *FORUM is in CC
    Memo 626 and _MTS Volume 23: Messaging and
    Conferencing_, Reference R1023, available at most
    Campus Computing Sites, and through *DOCINFO on MTS.

    CONFER II SUPPORT PACKET-
    You can also take advantage of the "Confer II Support
    Packet" prepared by the Computing Center. The packet is
    a step-by-step guide to setting up a conference and is
    available from the Workshop Registration Office, 3001
    School of Education (763-3700) or from your MTS
    Administrator. If you don't know who this is, call the
    Computing Center Accounts Office at 764-8000.

    CONFER II AND MTS HELP ITEM-
    The Computing Center has prepared a sample item with
    tips on MTS and Confer II use that you may want to
    transfer into your conference. The text is in the MTS
    file DOC:R1042*P on both systems. See the section "How
    to Enter the First Items in the Conference" of the
    "Confer II Support Packet" or call 764-HELP for
    information on how to load an MTS file into an item.

    CONFER II LECTURE/DEMONSTRATIONS-
    Encourage conference participants to attend the
    lecture/ demonstrations on Confer II offered by the
    Computing Center each term. Many organizers have found
    that participants must be comfortable with computers
    and with Confer for the conference to be successful.
    For more information, enter $COPY NEWS:CONF.LECTURE
    at the MTS pound (#) prompt or call 763-3700.

5. CLARIFY EXPECTATIONS

    COURSEWORK: Make sure students understand how the
    conference will be used in this course. Clarify the
    goals and participation requirements of the conference,
    and any special rules or guidelines you deem
    appropriate.

    PROJECT WORK: Make it clear to those participating in a
    work group (permanently or temporarily) what the
    expectations are for conference participation. Some
    work groups are large enough that conferences serve as
    the primary communication mechanism, and participation
    becomes mandatory.

6. SET BEHAVORIAL NORMS

    It is important to establish the behavioral norms for
    the conference. You can develop these yourself ahead of
    time or by getting group consensus on what topics
    should be included, whether pseudonyms can be used,
    etc. You may use your own discretion in developing
    those norms, short of condoning or participating in
    discriminatory behavior. Discuss norms in the classroom
    or in a meeting, since they are much easier to
    establish in a face-to-face setting.

    The _Guidelines for Effective Conferencing for
    Participants_, Reference R1045 contains a series of
    pointers on norms and etiquette. Take time to go over
    these "ground rules" in a class or meeting, or use one
    of the initial items in the conference for discussion.
    The Computing Center has prepared a sample ground rules
    item (DOC:R1043*P) that you can use as is, or you can
    tailor it for the particular conference.

    The norms below are discussed in the participants guide.
    They are noted again below with comments on how they can be
    established.

    - ELECTRONIC COURTESY
      Encourage participants to be thoughtful and
      respectful in their communications. Encourage the use
      of such conventions as "funny faces", e.g.

      :-)   :-(;-)   :-/

    - MUTUAL TRUST AND RESPECT

      INDIVIDUAL DIFFERENCES AND FREE SPEECH: Encourage
      your students or colleagues to respect everyone's
      right to an open and hospitable computing
      environment. It's very important for all conference
      participants to be sensitive to special needs and
      characteristics of others that arise from differences
      in gender, race, ethnic or religious background, or
      sexual orientation. It's vital that all participants
      avoid discrimination or harassment of others on the
      basis of such differences.

See the section "Resolving Problems Quickly" in this guide for what to do if serious problems arise.

CONFIDENTIALITY: Conference participants have the right to expect that their contributions will be treated confidentially within the context of the class or work group. This allows participants to express themselves freely, and avoids misinterpretation of comments taken out of context. Many organizers place a notice in the conference welcome banner stating that conference material can be printed out only for individual use, not for distribution.

There may be circumstances where you or some of the participants want to publish or distribute material outside of the conference. If so, this should be stated up front in the item text, so that all potential respondents are aware of this. Tell people not to respond to that item if they don't agree to those conditions. If anyone wants to distribute or publish conference materials on which there is no prior consent by participants, remind people that consent must be obtained from all involved parties before proceeding.

You may need to remind participants that an electronic conference usually uses a conversational style, not a style ready for publication. Participants use the conference as a forum to work out ideas, not necessarily to present fully-reasoned arguments.

You can use separate items to discuss attitudes about outside distribution of conference materials to develop a group consensus.

PSEUDONYMS: Pseudonyms can be used in Confer II conferences for items, responses, and messages, and participants can register in the conference under a pseudonym. Many conferences that allow pseudonymous comments ask participants to register under their own names. This establishes a legitimate tone to the conference up front, and helps establish the credibility of the participants.

Pseudonyms can be fun to use and can contribute positively to a conference. However, pseudonyms can also be used for anti-social activities. Most Confer participants use pseudonyms responsibly, but a few have used them to harass, slander, and maliciously mislead others, with serious consequences. If you feel pseudonyms should not be used in the conference, make sure participants understand that going in. If you allow them, make sure participants understand the responsibility they entail.

You may want to make it clear to the participants that it is relatively simple to discover the true identity of a pseudonym user. Contact Bob Parnes for information on how to do this. Keep a record of CCID assignments. If you suspect someone has registered under a pseudo, you can check the participant list. Confer will add an exclamation mark (!) to all pseudonymous items, responses or messages,

which is helpful when the pseudonym used is the name of a
real individual. This flag does not appear on pseudonymous
registrations.

- COMMON GOALS

  APPROPRIATE ENTRIES: Provide some guidelines about
  appropriate topics for items. You probably want to
  tolerate some off-topic items to stimulate interest in and
  enthusiasm for the conference. Suggest the public
  conferences as an appropriate forum for other off-topic
  discussions, e.g., MEET:STUDENTS on UB and USER:OPENFORUM
  on UM.

  You may want to make sure that participants understand
  that the conference includes everyone in the class or work
  group, not just those who are the most active. Remind
  people to hold personal conversations somewhere else.

  Ask participants to stay on topic, at least within any
  given item. Encourage them to start new items when they
  want to deal with new topics. This makes it easier to
  manage information flow.

  TIME COMMITMENT: Make sure that participants understand
  the time commitment they should make to the conference.

KEEPING THINGS GOING

Running a conference requires a time commitment, either by
the instructor, work group supervisor, committee chair or
by his or her designee.

1. STAY INVOLVED

    - Plan to sign on at least several times a week.

    - Keep items prepared to insert in case interest starts
      to drop off.

    - Participate yourself by entering items and responses.
      This is the most effective way to let participants know
      you're paying attention and that you're serious about
      the expectations you've set.

2. KEEP IT FUN

    Enter, or at least allow, some fun items, within the bounds
    of the behaviorial norms you have set. Too much seriousness
    can depress interest and enthusiasm.

3. RESOLVE PROBLEMS QUICKLY

    - PROBLEM PREVENTION
      You can head off a lot of disruptive or inappropriate
      behavior by setting norms clearly up front, and by
      providing written notice of expectations in the
      conference. If you have disallowed the use of
      pseudos, Confer allows you to enter a response "hint"

that will be printed each time someone begins a
pseudonymous entry. The text of the hint can notify
participants of the rules and inform them of the
consequences of violating them (e.g., loss of access,
loss of ID, poor evaluations, etc.).

- PROBLEM INTERVENTION
  Serious problems are rare. It's more likely that
  problems will take the form of occasional rudeness or
  domination of discussions by certain individuals.
  Handle these problems with private conversations,
  either face-to-face or electronic, if you feel the
  behavior is disrupting the conference.

  If the problem involves harassment, discrimination,
  use of pseudos to mislead people or other kinds of
  offensive contributions, you need to deal with the
  person and possibly conference material as well.
  Consider using all or some of the following actions.
  You are strongly encouraged to contact the individual
  privately as a first step.

  Options for handling people:

  - Have a private conversation with the participant.
    Make sure the participant is aware of the ground
    rules for behavior in the conference and the
    Computing Center's Conditions of Use policy, which
    condemns harassment and stipulates that violators may
    lose access to computing privileges.

  - If the problem was public, that is, in an item or a
    response that all participants saw, discuss the
    problem publicly so that other participants know the
    behavior is not tolerated and are assured that it's
    not being ignored.

  - If the problem was private, that is, in a private
    message to one or more participants, contact the
    recipient(s) of the offending message to let them
    know you've taken action.

  - If the behavior was sufficiently serious, you feel
    the expectations were made clear, or this is a second
    offense, you may decide that the appropriate
    consequence is removal from the conference. You can
    depermit the conference source file to the
    participant's ID.

  - Violations of the Computing Center's Conditions of
    Use policy should be referred to the Computing Center
    User Advocate (CCUA). Send an MTS message from UM or
    UB to CCUA informing them of the problem. The
    Computing Center may determine that the individual
    should lose all access to computing privileges.

  - Harassment or discrimination in a course conference
    may be considered a violation of your department's
    code of academic conduct and a violation of the
    University's anti-discrimination codes. You may want

to refer the problem to your department for further
disciplinary measures.

Options for handling material:

- Enter a response condemning the entry.

- Freeze an item.

- Retire or delete an item or response.

CONCLUSION

The University of Michigan is currently one of the few
educational institutions that offers its students, faculty, and
staff the opportunity to participate in electronic conferences.

An electronic conference is an excellent tool to support a wide
range of activities, and with adequate preparation and effective
organizing, it can be a successful and enjoyable experience.

GOOD LUCK!