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## Technical Evaluation Report

### 54. Best practices in synchronous conferencing moderation

Lynn Anderson, Barb Fyvie, Brenda Koritko  
Kathy McCarthy, Sonia Murillo Paz  
Mary Rizzuto, Remi Tremblay, and Urel Sawyers  
Centre for Distance Education  
Athabasca University – Canada’s Open University

#### Abstract

Practical guidelines are offered for the use of synchronous online conferencing software by session administrators and moderators. The configuration of the software prior to conferencing sessions is discussed, and the planning and implementation of useful collaborative activities such as “synchronised browsing.” The combination of these practices into useful “patterns” for specific online conferencing purposes is discussed.

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#### *A) Creating the conference session*

*Illuminate Live* is a relatively sophisticated example of online conferencing software, involving a correspondingly complex conference creation procedure (see reports 14 and 19). It is therefore a useful platform for the discussion of these procedures. The product allows conference administrators to create two types of sessions: a) meetings in a one-time or permanently open online “room”; and b) recurrent sessions running over a long duration. This section of the report focuses on the procedure for setting up a single meeting in an educational setting. It is assumed that the moderator is the instructor or a subject expert, and that the users are students and guests. Recommendations will be provided on how to lay the ground work for a successful meeting that not only facilitates learning but also fosters a community of learners.

The *Illuminate* Session Management utility (SAS) provides administrators with the tools necessary to schedule a meeting and to define the settings for the session. Beyond the necessary settings such as date and time of the meeting, many other options are available. These include, but are not limited to:

- Name of the moderator
- Number of minutes prior to the conference start time during which users may join the room

- Option to record the session
- Option to allow users further, automatic privileges (e.g., voice and text chat).

The administrator also has the option of granting special privileges to a moderator, including:

- Ability to supervise the room
- Control over the beginning and end of the session recording.

During the meeting, the moderator may grant these same moderator privileges to others in turn. In order to encourage the development of an efficient online community of learners, several recommendations may be made as to the setting of the above options.

- A basic good practice for meeting set-up is to plan the moderator features and timing of the session thoughtfully in advance.
- To allow the participants time to congregate and chat, the conference area should be opened to users at least one-half hour prior to the meeting. The moderator should be present at this time to deal with questions about the software and the topic to be discussed. This lead-time also allows users to become more familiar and comfortable with the moderator.
- The option to record the session should be left to the moderator. He or she can best determine the need for this. If students know in advance that a session will be recorded, they may be less diligent about attending and contributing to it; it should be noted that privacy regulations or expectations may require that participants be informed of this intention before the session begins.
- *Illuminate Live* privileges should always be granted to users, in order to prevent the participants from being little more than a passive audience. There should be opportunity for chat and collaboration between users. When this privilege is removed, they may be able merely to text-chat with the moderator for the purpose of asking questions.
- The moderator should not necessarily be granted the option to "supervise" the room. When the "supervise" setting is chosen, the moderator sees all text chatting, including private messages. By assuming this level of control, the moderator denies the students the opportunity to make personal comments. The moderator's personal teaching style may approve or disapprove of this facility, although any constraint of the freedom to communicate privately during sessions may impede the creation of an efficient community of learners. Worse still, it may allow for invasion of a privacy that the students believe they rightfully possess. Whether the option is selected or not, it is important that students be told at the outset of the meeting whether their private messages will be visible to the moderator.

### ***B) Synchronised Web-browsing***

Also known as Web-touring and co-browsing, synchronised browsing is a feature of various conferencing products, including *Elluminate* and *iVocalize*. This option allows moderators to provide a browser-based guided tour using selected URLs (Web addresses) and embedded links to relevant Internet resources. The ability for all participants simultaneously to navigate the Web under moderator control is a powerful device in Web presentations, providing a useful forum for participant interaction. This section of the report offers guidelines for synchronised browsing using *iVocalize*, including the advance organisation of sessions, and in-session pacing methods facilitating meaningful discussions in the creation of a community of learners.

The organisation of an effective Web-tour begins during the planning of an event in *iVocalize*'s "Room Control Panel," where moderator and participant features are selected. By selecting "Allow Web Browsing by Non-moderators," for example, the administrator allows independent browsing by participants. If this feature is disabled during the session, participants will see the Web content without the URL, and clicking on embedded links will have no effect. The moderator can relinquish control over synchronised surfing when participants are exchanging webpages, and can regain it by entering the preferred URL and pressing "Send Current Web Page" on the Moderator menu.

A variety of techniques can be used to organise the URLs that will be presented in a session. They can be listed in a text document for users to copy and paste during the presentation, and/ or they can be organised in advance on the moderator's browser, for accessing during a session using *iVocalize*'s "Favorites" menu. Moderators can also pre-load multiple webpages, and can use the "Back" and "Forward" arrows beside the address bar during the session. Moderators should advise participants of their actions during synchronised browsing, to minimise confusion and to facilitate efficient discussion.

It is important to identify all moderators in advance, as they cannot be assigned during the session. However, the moderator can receive URLs "on-the-fly" when non-moderators have Web-touring capabilities. Participants have the option of right-clicking on user names, including the moderator's, and then selecting "Send Page To Selected User." On receiving a URL, the moderator can send this resource to the group by selecting "Send Current Web Page" on the Moderator menu. In addition, it is important to note that if more than one moderator is assigned to a session, only one can enable "Synchronized Browsing" on the Moderator menu, in order to exchange Web resources. The first moderator must disable it from the Moderator menu before another moderator can begin synchronised browsing activities.

The moderator should plan to attend the session early, and should confirm that all participants are in the session within a reasonable period before beginning synchronised browsing. Participants may be advised to communicate technical issues to a designated assistant using the private text-chat box, and to use the "Show URLs in Text Chat" feature provided on the "File" menu. This feature ensures that when switching to a new URL or selecting a hyperlink, the specific address will automatically appear in the text-chat box. In addition, if new participants arrive after the session has started the moderator must synchronise them with the rest of the group by pressing "Send Current Web Page" from the Moderator menu.

### ***C) Developing conferencing "patterns"***

Guidelines such as those proposed above may be amalgamated into “patterns” for particular online teaching and learning purposes. Alexander (A Pattern Language, Oxford University Press, 1977) conceived of using patterns in architecture. He stated that “Each pattern describes a problem, which occurs over and over again in our environment, and then describes the core of the solution to that problem, in such a way that you can use this solution a million times over, without ever doing it the same way twice.” Organisations such as e-Len in Europe are beginning to establish “pattern repositories,” to advance the sharing of best practices among networked learning practitioners.

This final section of the report proposes a pattern to support moderators in planning effective and inclusive synchronous learning experiences in a networked-learning environment. It builds upon previous observations in this series (report #26), about “the moderator’s roles regarding participant access and motivation, online socialisation, information exchange and knowledge construction” in synchronous conferencing. The following pattern focuses on the planning of these activities, and relates to existing patterns formulated by e-Len (Forming Groups for Collaborative Learning, and Making Online Learners Trust Each Other). The pattern applies to the organisation of online seminars/ conferences, collaborative workshops, and team meetings for the purpose of online collaborative work

### **Pattern Name: Planning Online Synchronous Activities**

**Background:** The moderating of online synchronous learning activities as part of an effective and inclusive learning environment is dependent upon prior planning and preparation. The degree to which the activity is structured, and the support structures put in place, are vital in promoting participation from all participants.

**Context:** You are a facilitator/ moderator of a one-hour synchronous class using software with VoIP, collaborative tools, and presentation capabilities. The session is focused on providing students in a graduate education program with formal guidance on “How to work in virtual teams,” and to give the learners an opportunity to begin a group project.

**Problem:** How do you plan for an effective and inclusive synchronous learning experience in an online conferencing environment?

#### **Analysis of Problem:**

- The online conferencing tool may be new to you and the participants
- The learning environment provides multiple tools for communication and presentation, such as text-chat, VoIP audio, synchronous presentation, shared whiteboard, and co-browsing
- There is a short time-frame in which to cover the required material and to solicit active participation from the entire class
- Technical problems may arise during the session, further reducing the time available.

**Solution (Planning):** Plan ahead with the problem analysis issues in mind. For example,

- Provide technical requirements and a site on which to test the technology in advance; also, self-paced tutorials for participants to review prior to the session
- Conduct your own practice session in order to gain confidence with the tools and to test the presentation materials
- Provide the class with an agenda and goals for the session beforehand

**Activity Structure:** Structure the session to include equal and inclusive participation. For example,

- Provide protocols for the session and guidelines for participation
- In order to encourage social interaction, encourage participation by starting and ending the session with a discussion question that each participant can answer
- To support knowledge gain, incorporate planned questions that are open-ended and thought-provoking, and which allow participants to draw upon their personal experience
- Develop learning strategies that optimise the use of the conferencing software's features, in order to provide the richest learning experience possible.

**Support Structure:** Provide support during and after the session by:

- Arranging for additional technical support using one of the participants or an outside support person who is familiar with the conferencing tool, to handle any technical difficulties during the session so that the facilitator is not interrupted
- Providing a means of following up on activities after the session, to gain feedback and to resolve any outstanding issues (conference board, participants' email, etc.)
- Model a positive, supportive, and respectful tone in facilitating the session via constructive and encouraging comments.

## Conclusions

*Illuminate* offers extensive meeting set-up features, providing both moderators and users with effective options for interaction and learning. The basic configuration is simple and intuitive, with good automated features. The software offers additional controls for users looking for efficient customisation of sessions. In addition, the synchronised Web-browsing features of products such as *iVocalize* provide moderators and participants with the benefits of sharing browser experiences and relevant Web resources. Practical guidelines for efficient conference planning and moderation may be usefully combined into effective prescriptive "patterns," for use in specific educational situations.

The next report in the series describes best practices and collaborative software in online teaching.

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**N.B.** Owing to the speed with which Web addresses become outdated, online references are not cited in this report. They are available, together with updates to the current report, at the Athabasca University software evaluation site: <http://cde.athabascau.ca/softeval/>. Italicized product names in this report can be assumed to be registered industrial or trademarks.

*Patrick J. Fahy, Interim Series Editor* (Jon Baggaley is on sabbatical).

