

# **Re-engineering the Lifelong Learning Infrastructure:**

## **Learning Clusters and their Potential Role in Regional Ufi Implementation**

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**May 2000**



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# Contents

<b>1</b>	<b>EXECUTIVE SUMMARY .....</b>	<b>1</b>
<b>2</b>	<b>BACKGROUND TO THE PROJECT .....</b>	<b>3</b>
2.1	PREVIOUS RESEARCH.....	3
2.2	DEVELOPMENTS IN THE LEARNING MARKET SINCE THE LAST REPORT.....	4
2.3	THE LEARNING CLUSTER CONCEPT.....	4
2.4	THE LOCAL AND REGIONAL DIMENSION.....	5
2.5	UFI LEARNING SUPPORT PROPOSALS.....	6
2.5.1	Types of Learner Support.....	6
2.5.2	Role of Online Conferences.....	6
2.5.3	Competences for <b>learndirect</b> Tutors.....	7
2.5.4	Logistics of Supporting Learners.....	8
<b>3</b>	<b>DESK RESEARCH .....</b>	<b>9</b>
3.1	INTRODUCTION.....	9
3.2	LEARNING CITY NETWORK'S LEARNING COMMUNITIES PROJECT.....	9
3.3	VIRTUAL COMMUNITIES RELATING TO COMMERCE SITES.....	10
3.4	ONLINE TUTORING.....	11
3.5	ONLINE FACILITATION & COMPUTER-SUPPORTED COLLABORATIVE LEARNING.....	12
<b>4</b>	<b>LEARNING CLUSTERS: PRACTICAL EXAMPLES IN THE REGION .....</b>	<b>13</b>
4.1	INTRODUCTION TO THE ACTION RESEARCH.....	13
4.2	THE TECHNOLOGY OF ONLINE CLUSTERS.....	14
4.3	CITINET LEARNING CENTRES CLUSTER.....	15
4.3.1	Description of Cluster.....	15
4.3.2	Roles of DJA and Other Key Players.....	17
4.3.3	Narrative Overview.....	18
4.3.4	Approach and Dynamics of this Cluster.....	18
4.3.5	Analysis of Exchanges.....	19
4.3.6	Analysis of Key Motivators and Barriers.....	23
4.3.7	Forecast for the Future.....	24
4.3.8	Links to Ufi.....	24
4.4	WEBWISE LEARNERS CLUSTER.....	25
4.4.1	Description of Cluster.....	25
4.4.2	Roles of DJA and Other Key Players.....	27
4.4.3	Narrative Overview.....	27
4.4.4	Approach and Dynamics of the Cluster.....	28
4.4.5	Analysis of Exchanges.....	29
4.4.6	Analysis of Key Motivators and Barriers.....	30
4.4.7	Forecast for the Future.....	31
4.4.8	Links to Ufi.....	31
4.5	WHITBY IT CLUB CLUSTER.....	32
4.5.1	Description of Cluster.....	32
4.5.2	Roles of DJA and Other Key Players.....	34
4.5.3	Narrative Overview.....	34
4.5.4	Approach to the Cluster.....	34
4.5.5	Analysis of Key Motivators and Barriers.....	37
4.5.6	Forecast for the Future.....	37
4.5.7	Links to Ufi.....	38
<b>5</b>	<b>DISCUSSION AND COMPARISON OF RESULTS WITH EXEMPLARS .....</b>	<b>39</b>
5.1	REVIEW OF COMPARATIVE SUCCESS OF PILOT CLUSTERS.....	39
5.2	EXEMPLAR CLUSTERS.....	40
5.2.1	Network Users' Forum.....	40
5.2.2	LeTTOL Completers.....	41
5.3	REVIEW OF RESEARCH QUESTIONS.....	42
5.3.1	What works and what doesn't work in building and facilitating effective learning clusters?.....	42
5.3.2	Who are the 'influential peers' for different individuals and businesses?.....	43
5.3.3	To what degree do associations already exist to support these clusters of peers?.....	43
5.3.4	What are the possible ways to 'focus' a learning cluster?.....	44
5.3.5	What could be the role of <b>learndirect</b> tutors and tutor groups in building clusters and 'community feeling'?.....	44
5.3.6	What are the staff development needs for tutors and where are they going to come from?.....	45
5.3.7	How should learning clusters fit within the management practices of <b>learndirect</b> hubs and centres?.....	46
<b>6</b>	<b>RECOMMENDATIONS FOR NEXT STEPS.....</b>	<b>48</b>
<b>7</b>	<b>REFERENCES &amp; BIBLIOGRAPHY.....</b>	<b>50</b>
<b>8</b>	<b>RATIONALE FOR LEARNING CLUSTERS .....</b>	<b>51</b>

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# Acknowledgements & Copyright

Industrial or technological change can bring about both threats and opportunities which are rarely confined to specific groups of people or geographical areas. This is certainly the case with Information and Communication Technology (ICT) and the emerging Information Society. TEC/CCTEs and other organisations have an important role to play in supporting businesses and people who wish to take advantage of the opportunities ICT provides. However, more can be achieved where expertise and resources from different sectors and geographical areas are combined. Local, and to a certain extent regional or national borders need to be crossed.

The nine Training and Enterprise Councils in Yorkshire and Humberside and the regional Trade Union Congress are working on an initiative, CoMPRIS/Adapt, under the European Programme Adapt. The aim is to link ICT developments with business and skill needs of companies and employees.

The main objectives of CoMPRIS/Adapt are:

- Underpin CoMPRIS, the Regional Information Society Strategy.
- Using ICT raise the level of skills needed to develop a learning region.
- Pilot “The University for Industry” (Ufi).
- Further develop and implement the TEC;TUC Accord.
- Raise awareness of decision-makers, businesses and the workforce and demonstrate the opportunities and threats presented by the Information Society.
- Develop and pilot new products and services.

These objectives will be achieved through a large number of research and pilot projects developed and delivered at a local and regional level and by working together with partner organisations from other European countries.

The purpose of this report is to specify a framework for the development of learning clusters to complement the implementation of Ufi/**learn**direct learning in Yorkshire and Humberside.

We would like to acknowledge the support we have received in carrying out the research reported here from:

Andy Wynne and Laura Bennett (CITINET), Julia Duggleby, Tony Fletcher and Seb Schmoller (The Sheffield College), Mike Cox (Darlington College), Margaret Simmonds and Lois Carter (North Yorkshire TEC), Mike Hutchinson (The Conversion Company), Jules O’dor, Project Manager on behalf of Yorkshire and Humberside TECs (Bradford and District TEC).

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## Acronyms

BAP	Business Access Point
BDA	Business Development Agency
CBT	Computer-Based Training
CLAIT	Computer Literacy and Information Technology
CoMPRIS	Co-operating Members of the Public and Private sectors Information Society
CMF	Capital Modernisation Fund (administered by DfEE for development of ICT learning centres)
DfEE	Department for Education and Employment
DJA	DJ Associates (researchers for this report)
ECDL	European Computer Driving Licence
ERDF	European Regional Development Fund
ESF	European Social Fund
FEFC	Further Education Funding Council
HE	Higher Education
ICT	Information Communications Technologies
IITT	Institute of IT Training
ILA	Individual Learning Account
LeTTOL	Learning To Teach On-Line (accredited course developed by the eight South Yorkshire FE institutions)
LIN	Learning Information Network
LSC	Learning and Skills Council
NGfL	National Grid for Learning
NUF	Network Users' Forum
NVQ	National Vocational Qualification
R&D	Research and Development
RIS	Regional Innovation Strategy
SME	Small or Medium-sized Enterprise
SYNE	South Yorkshire Networks for Enterprise (project run by consortium of all FE colleges in the sub-region)
TEC	Training and Enterprise Council
TUC	Trades Union Congress
Ufi Ltd	The charitable company tasked with developing and running Ufi nationally
Y&H	Yorkshire and Humberside/Yorkshire and the Humber

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# 1 Executive Summary

The term 'learning clusters' refers to communities of learners who share similar interests in learning, are able to learn from each others' experiences, and who are influenced by each others' opinions about the positive value of learning.

This report documents some pilot action research into the development of learning clusters to support the implementation of Ufi/**learndirect** in Yorkshire and Humberside. DJ Associates was commissioned to carry out this project by the Training and Enterprise Councils (TECs) in Y&H, and this report is intended for TECs and their partners. The project is closely tied to the *Regional Implementation Strategy for Ufi Project*, which DJ Associates completed in 1999.

The concept of learning clusters is taken from this earlier project, where we recommended that such clusters be promoted as an enabling mechanism of a new market for flexible learning opportunities and lifelong learning. This is one part of a strategy to re-engineer the learning infrastructure to make it more learner-centred, in that the proposed clusters are based around the interests of learners rather than of providers.

There are a number of precedents for learning clusters and the techniques used to develop them. These include work done under the auspices of:

- Learning Communities in 'Learning Cities'
- Virtual Communities in commercial marketplaces
- Online tutoring
- Computer-supported cooperative learning

In this project we took the techniques established through these precedents and applied them to three pilot learning cluster developments. Each of the clusters had a focus on learning activities shared among its members, but they varied in a number of their characteristics:

- One focused on staff in the learning/hub infrastructure; one on private individuals; and one on small businesses
- One had a pre-defined membership; the other two had open membership, and had to be promoted to their target audiences to attract members
- All three were independent of any formal learning programme (our attempts to study a cluster tied to a specific course fell through)
- All three were mostly supported online by Email Discussion Lists, but this was complemented by varying degrees of face-to-face activity in each case

Our research has pointed to a number of lessons learnt from the successes and failures of the pilot learning centres. Factors that influence success include:

- Sufficiently long timescales to enable a cluster to gain momentum, and a commitment to developing the cluster in the long term, looking well beyond six months
- Provision of support for online discussion to provide a focus for the cluster, as well as a cost-effective means of communication between face-to-face sessions
- Input from someone experienced in facilitation and animation of groups (online/offline)
- Effective strategies for recruiting members to the cluster, using word of mouth referrals more than 'traditional' marketing methods
- Good links with local partners and advocates to promote synergy between cluster activities and other developments
- Targeting an audience with a baseline of awareness and experience of online discussions
- A sponsor and champion who has a clear vested interest in the long-term success of the cluster
- Support and involvement from *members* with a commitment to the success of cluster
- A clear understanding of what will motivate each of the sub-groups in a cluster to participate actively, plus rewards and recognition to reinforce this participation

Our research has also identified the 'qualifications' for existing associations (of individuals and businesses) that may be able to act as seeding grounds for learning clusters:

- 
- Strong links into a constituency with a common purpose, and some degree of respect for and loyalty to fellow members of the constituency (as well as to any central administrative function of the cluster)
  - Ideally an established culture of member-to-member communications
  - A focus on and commitment to promoting informal learning (awareness raising, professional updating, experience transfer) and/or informal learning among its members
  - Links to other associations and organisations to make it possible to leverage their resources and/or members
  - An executive or administrative staff with
    - Enthusiasm for and experience of online discussions
    - A clear pay-back from successful growth of the cluster (in terms of numbers of members and/or exchanges)

Based on the latest information from Ufi about how they expect their learner support arrangements to operate, this report proposes a role for local/regional learning clusters in bridging the gap between episodes of learning – and thus supporting and complementing Ufi’s aims. There is clearly a need for this to be justified in terms of a business model for developing and supporting clusters, but the report points to increasing synergy with other developments in the learning infrastructure, including (from 2001) **learndirect** membership.

The arrangements for tutor support in delivering **learndirect** courses presuppose the availability at hub level of a corps of tutors skilled in the specific demands of online tutoring and facilitating course-related online discussions, which may form the basis for learning clusters. It is now an *urgent priority* to ensure that such a corps or tutors is in place, both for core **learndirect** provision, and to support the wider development of learning clusters.

The urgency of this development is further underlined by a recent Ufi Learning Support Circular, issued as we were finalising this report, which stipulates the skills and knowledge which are considered “essential for staff within the hub arrangements”. Some of the competences for specialist online tutor support are quite challenging, and also rare. These may include specific training and qualifications in the facilitation of online clusters.

Further recommendations are:

- Hubs and other local lifelong learning partnerships should review the associations that could act as fertile seeding grounds for online communities, based on the ‘qualifications’ provided in this report
- At a regional level, TECs/their successor organisations and their partners should establish a forum for hub technical managers to coordinate the technical infrastructure for supporting learning clusters and involve Ufi in these discussions once needs start to emerge
- Local hubs should also consult Ufi about their plans for individual and business membership, and explore how membership of local/regional learning clusters could integrate with this
- They should also be prepared to raise issues with Ufi concerning the development of local clusters and how these could or should be supported by and linked to **learndirect** services and technology
- Managers of **learndirect** hub consortia should develop Business Models for learning clusters

The costs and benefits that should be considered in these Business Models include:

- Costs of tutor time in facilitating the clusters
- Costs of venues and facilities for cluster meetings
- Costs of technical infrastructure and support for online activities
- Logistical and marketing overheads in recruiting advocates for the cluster and cross-promoting it in other existing clusters or associations
- Projections of increased throughput of learners both on **learndirect** courses and other provision from hub partners – particularly by attracting more repeat business
- Building capacity and confidence among learners for taking up e-learning opportunities
- Links and synergy with parallel initiatives, including RIS sectors, CoMPRIIS developments, Individual Learning Accounts
- Potential long-term savings on advice and guidance services

In summary, we would emphasise that **learndirect** hubs and their partner organisations will have to engage fully in the agenda for developing learning clusters, as Ufi are unlikely to be in a position to set a lead in this area with active participation of local partners.

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## 2 Background to the Project

### 2.1 Previous Research

From August 1998 to April 1999, DJ Associates carried out a research and strategy development project, commissioned by the TECs in Yorkshire and Humberside. Our brief was to develop an implementation plan for the University for Industry (Ufi) concept across the region. This was based on research into

- demand for flexible learning opportunities among the general public, employees and employers
- a survey of existing/planned learning centres in the region
- interviews with a range of learning providers from different sectors, each with some experience of delivering learning in the ways envisaged by the Ufi concept

The research has now been published as a report, *The Development of a Regional Strategy for the Implementation of the University for Industry in Yorkshire and Humberside*.

One of the key recommendations from this report was that local and regional partners should focus on the development of 'learning clusters' as a cornerstone and enabling mechanism of a new market for flexible learning opportunities and lifelong learning. This is one part of a strategy to re-engineer the learning infrastructure to make it more learner-centred (because the clusters are based around the interests of learners rather than of providers).

In discussions with the Steering Group of Yorkshire and Humberside TECs that oversaw our initial project, we developed a proposal for a second-stage research project that would test out some of the recommendations in the original report.

Our approach in the present project was on targeted 'action research' and experimental piloting of ideas, rather than on covering a broad sweep of the region through questionnaire surveys.

We set out with an ambitious set of research questions to address:

- Overall: what works and what doesn't work in building and facilitating effective learning clusters?
- Who are the 'influential peers' for different individuals and businesses (i.e. the people who would act as effective role models for taking up lifelong learning and/or as friends and supporters as part of a learning group)?
- To what degree do associations already exist to support these clusters of peers (e.g. sector based clubs and trade associations)?
- To what degree do people in each of these clusters already participate in learning (individually or together)?
- What are the possible ways to 'focus' a learning cluster e.g. around a learning centre, at sector-focused events, in an online forum?
- What could be the role of Ufi tutors and tutor groups in building the clusters and 'community feeling'?
- Assuming there is a role, what are the staff development needs for these tutors and where are they going to come from?
- How should organising learning on a cluster basis fit within the management practices of Ufi Hubs and Learning Centres?

Our terms of reference were to produce the following outputs:

- Exemplar/model learning clusters in one or two sectors – leading to increased take-up of learning
- Initial framework of best practice for growing learning clusters: what works and what doesn't in making them effective (though it was clear that with just one or two pilots it might not be possible to fill in this framework completely)
- Recommendations for further development, for example:
  - How to develop tutor skills to facilitate learning clusters
  - How to manage online and offline support mechanisms for clusters
  - How to take account of 'local' factors in tailoring support for different kinds of communities
- Recommendations for Ufi Hubs and Learning Centres in the region to enable them to build learning clusters and target learning opportunities into these clusters effectively.

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## 2.2 Developments in the Learning Market since the last report

At the time of our initial report's preparation, the corporate plan prepared by the Ufi 'Transition Team' was still awaiting ministerial approval, and very few of the staff of Ufi Ltd had been appointed. While the terminology of local 'hubs' as consortia contracting with Ufi for what were then called local 'franchises' had been publicised, much has moved on since then. The terms of these contracts, and the bidding process for them, have gradually emerged, and a network of **learndirect** 'development centres' was launched in November 1999, with Development Phase 2 starting in May 2000. The Department for Education and Employment has also developed plans for further learning centres, supported by the Capital Modernisation Fund (CMF), as announced in the 1999 Budget.

Fuller details of the current parameters for operating Ufi/**learndirect** services are provided in the next section. The overall change that concerns us here is that the Ufi/CMF developments fit into a broader trend, highlighted in our report last year, for *the provision of learning services to be less directly tied to existing learning institutions and their boundaries.*

This trend is driven by the steady, and now apparently accelerating, growth of flexible learning opportunities which make it possible to decouple some of the activities which have hitherto made learners dependent on traditional institutions. This 'freeing up' of the relationships between providers and learners is opening up a new marketplace, and it is clear that for individual learners neither the local college, nor Ufi, nor any other provider will be the only show in town.

The last year has also seen major moves from the commercial sector (driven most noticeably by US-based organisations) to position themselves for the growing market opportunities. This includes development and consolidation of services such as Asymetrix's Click2Learn learning portal (<http://www.click2learn.com/c2l/>) and SmartForce (<http://www.smartforce.com/>), new start-ups such as Hungry Minds (<http://www.hungryminds.com/>) and Microsoft's Anytime Anywhere Learning (<http://microsoft.com/education/aal/>). The latter of these is already being investigated as a likely model for implementation in South Yorkshire, as part of the Objective 1 European funding programme there.

## 2.3 The Learning Cluster Concept

In our original report, we proposed that one of the key roles that local and regional partners could play in the implementation of the Ufi concept would be in assisting the 're-configuration' of the market for learners, so that it is grouped around learner interests, rather than around institutional boundaries. We used the term 'learning clusters' to refer to communities of learners who share similar interests in learning, are able to learn from each others' experiences, and who are influenced by each others' opinions about the positive value of learning.

To quote the original report:

There are a number of reasons for developing a learning infrastructure in the region that is orientated towards learning in groups with common interests:

- People *like* learning in groups – a point reinforced by our research
- Communication between learners enhances the learning process considerably
- Groups of learners are likely to act as good networks and conduits for 'word-of-mouth' recommendations
- Targeting groups with a coherent identity may draw more people into learning: it creates role models within the group that other group members want to emulate.

...

As used in this report, we define a learning cluster as a network of people with the following characteristics:

- The members of the cluster feel some sense of common identity and common bond with each other
- 'Membership' may be through a formal or informal association
- People in the cluster respect each others evaluations and see each other as peers and role models
- They are thus favourably disposed to learning with and from each other
- People in the cluster have regular contact with each other, usually covering more than one type of transaction (i.e. not just one-way trading or power relationships)
- Clusters may therefore emerge in whatever networks people associate with (e.g. local communities, business sectors and trade associations, social clubs, hobbies)

(A full excerpt of the rationale for learning clusters is provided as an Annex to this report.)

It is important to draw out from this description that the cluster concept is *not* principally concerned with creating one more channel for information dissemination. The term dissemination implies a one-way process where sender broadcasts to audience. Clusters are concerned more with *conversation* between all parties, as happens in many informal networks, and with opportunities for spreading word of mouth.

As we envisage learning clusters, they may be formed along two dimensions, which affect how people come to associate with each other. The first is whether they communicate mostly face-to-face, online, or using a combination of both. The other is whether the learning cluster is based around a formal course or learning programme that all the members are doing together, or whether the members constitute a less formal ‘community of practice’. Communities of practice is the term that has come to be used to describe a group of people are working in similar areas on common problems, but often for different organisations<sup>1</sup>.

	<b>People doing a course together</b>	<b>‘Communities of practice’</b>
<b>Face-to-face</b>	People attending evening classes	Sector groupings of businesses that meet through seminars and conferences
<b>At a distance / Online</b>	Online conferences and chat rooms dedicated to specific courses	Online professional associations, company extranets, or interest groups <sup>2</sup>
<b>Combination</b>	Open University or MBA courses with residential sessions	Partnership networks (such as those in the education and training sector) that may meet and have intranet facilities.

**Table 1: Examples of different main dimensions of learning clusters**

In Section 4 of the report, we review instances of some of these categories of learning cluster from within and outside the present project.

## **2.4 The Local and Regional Dimension**

Although the world has moved on since our original report, we believe the case for local and regional involvement in the support of learning clusters may have become even stronger as a result. The positive development for each individual learner is that they will have greater choice in how they learn, where they learn and who they get their learning from. There are a number of factors that could influence how well they exercise this choice, but principal among these are likely to be:

- The quality of the advice available to them to differentiate the pros and cons of different learning routes
- The influence of ‘word of mouth’ factors – which our original research showed were rated as the most frequent sources of learning information by both learners and their providers independently

Word of mouth is a very difficult influence to pin down. It covers a multitude of sins. Nevertheless we hypothesise that learning clusters could be a significant medium, formally or informally, for passing on word of mouth recommendations about learning opportunities to like-minded people.

To this we would add that our original conception of learning clusters was that some, if not all, such clusters would have a life that extended beyond a specific learning programme. In other words, you keep in touch with the people you learn with beyond the period when you doing a particular learning activity together. This ongoing contact enables you to keep abreast of the way your peers are building on the experience you shared with them in their own continued learning and careers. Members of the

<sup>1</sup> International research communities are perhaps the most ‘pure’ example of this, but there are other more local manifestations, as we will see. For a general overview of the term, see <http://www.co-i-l.com/coil/knowledge-garden/cop/index.shtml>

<sup>2</sup> For an example of a relatively open (in the sense that anyone can join in principle) online community of practice, see the Motley Fool UK (<http://www.fool.co.uk/>) – a community of people sharing tips in personal finance and investment

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clusters thus act as ongoing role models for each other, and may thus keep each other 'in the loop' of learning. Learning clusters could act as one of the enabling mechanisms for building a lifelong learning culture.

Local Learning and Skills Councils (LSCs) will have a vital role to play in guiding learners towards an increasingly global range of learning opportunities available to them. It will be difficult to offer all constituents a one-to-one advice service (though for some this may be necessary). We therefore believe that the fostering of learning clusters may offer a cost-effective means<sup>3</sup> of tapping the expertise and experience that exists among learners, and using this to inform other learners (potential or actual) of opportunities that may be relevant and available to them.

## 2.5 Ufi Learning Support Proposals

Even if Ufi/**learndirect** is not the only flexible learning show in town, it is still likely to be a very significant player in this arena. As of September 2000, Ufi will be pretty well unique in having the combination of a portfolio of flexible learning materials (delivered online, via post or via **learndirect** centres) and a national network of local delivery support through its hubs and centres.

At the time of writing the most comprehensive public statements Ufi has made that are relevant to learning clusters are the document *Learner Support – The Ufi Proposals, a Consultative Document* by Helen Milner and Ian Draffan, circulated to hub partners by Bob Fryer on 5 January 2000, and the follow-up Ufi Learning Support Circular, circulated on 10 May 2000 (Reference number: 2000/13).

### 2.5.1 Types of Learner Support

The Learner Support Consultative Document sets out outline proposals for using online tutor support and conferencing for ensuring that learning remains a 'social activity', whether it is conducted face-to-face or online. It outlines three basic types of support:

- **Base Level Support:** Welcome, induction, sales, admin, enrol, information, advice, introduction to learning facilities and resources
- **Mentoring & Facilitation:** helps to start learning, encourages, negotiates, helping learners experiencing simple problems with resources, motivating learners and providing advice on next steps
- **Specialist support:** specialist knowledge, process specialist, fulfils external accreditation standards

All three are expected to be available online via the Ufi learning environment (which uses a dedicated email service, and the WebBoard™ web conferencing package), while the first two should also be available in all **learndirect** centres.

The role of peer support among learners is noted, but only briefly, viz: "Peer support should be encouraged as giving some of the very best in learner support. Learners are a resource to each other and this needs to be recognised."

### 2.5.2 Role of Online Conferences

The paper goes on to give more details of the arrangements envisaged for specifically online learner support. It suggests that online tutors should be proactive in their approach to learners, "not only responding to the learner's support requests but ... interacting in a structured and interventionist way both encouraging the learner and offering specific support and advice"

Four types of online conference are outlined:

- **Topic conferences** – for learners undertaking the same course, under their own control – this type of conference is principally to enable peer support
- **Tutorial conferences** – also for learners undertaking the same course, but managed and led by the tutor

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<sup>3</sup> This belief is based in part on our own anecdotal experience of a cluster (mostly supported online) which became wholly self-sustaining (i.e. continued to develop without any outside funding) after initial development investment – see Section 5 for more details.

- **Tutor conference(s)** – apparently intended for peer support among tutors to evolve a ‘community of practice’ among them, although it is envisaged that learners may have read-only access to this
- **Learning conferences** – specifically for learners to undertake groupwork, though it is not clear how this groupwork is assigned (by the learners themselves, by the learning materials, or by the tutors?)

Finally, physical meetings between tutor and learner are also recommended on the basis that these provide “a sure way of community building”

### 2.5.3 Competences for **learndirect** Tutors

Near the end of our project (10 May 2000), Ufi issued a Learning Support Circular to follow-up the *Learner Support* consultative paper. This lists a set of competencies for staff working in **learndirect** centres including items such as “use the WWW and Internet facilities in teaching and learning.”

The following table is extracted from this circular.

	<b>Essential Tasks</b>	<b>Skill And Knowledge Required</b>
<b>Base Level Support in a Learning Centre</b>	Welcome .Registration Payment Induction into <b>learndirect</b> and courseware Introduction to facilities and resources within the centre.	Admin skills Customer care skills Computer literate up to ECDL
<b>Facilitation in a Learning Centre</b>	Basic Technical Backup. Encouragement and support for learners. Encouragement to stay with the learning. Helping to identify problems and solutions. Give learning advice including planning.	Understanding of learning and learning styles Counselling skills to listen and feedback Confident in technology
<b>Facilitators Working at a Distance</b>	Regular communication with the learner through phone, mails or e-mail. Encouragement to stay with learning. Helping to identify problems and solutions. Give learning advice including planning. Identify areas where learner may require help. Intervene to ensure learner success. Provide advice on the availability and requirement for assessment offered by hub.	Understanding of learning and learning styles Use telephone, email and conferencing effectively Computer literate ECDL/CLAIT2 Online support skills Advice and counselling skills
<b>Specialist Support Tutors Primarily at a Distance, Sometimes in a Centre.</b>	Give subject specific online/phone help and advice. Give help with subject specific aspects of <b>learndirect</b> packages. Monitor progress and give regular feedback. Identify areas where learner may require help. Intervene to ensure learner success. Facilitate assessment. Give feedback and evaluation of learning programmes	Teaching or training qualification or relevant expertise ECDL or equivalent. Online tutoring qualification e.g. <b>learndirect</b> , LeTTOL Scottish Higher Assessor Qualifications and Customer care/people skills.

**Table 2: Ufi’s definition of the tasks, skills and knowledge essential for staff within the hub arrangements**

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## 2.5.4 Logistics of Supporting Learners

There has been some debate over the logistics of arranging all the kinds of tutor support, and it seems likely that this debate will rumble on up to, and possibly beyond, the full launch of **learndirect** in Autumn 2000. The 'default' option favoured by Ufi has been that hubs should take prime responsibility for organising tutor support for the learners on their books.

The May 2000 Learning Support Circular from Ufi confirms this: "Where there are virtual learners the hubs will need to plan and define how facilitation and mentoring is provided on-line. Every hub will need to ensure that it appoints subject tutors capable of tutoring the courses on-line."

However, it is recognised that hubs may have difficulties providing specialist tutor support in some fields, especially where throughput volumes are not high. Given that specialist tutor support is planned to be delivered online, there is a clear case for achieving economies of scale by having some supra-hub 'clearing house' for matching learners and tutors in some fields.

Whether Ufi will elect to play a role in coordinating this nationally, or whether there might be scope for regional collaborations, is not yet clear. The latest Ufi circular says simply, "Some hubs may wish to share tutors between them. Others might ask Ufi to assist in acquiring tutors from other hubs." For now, we must assume that responsibility for tutor provision will lie mainly with the hubs (i.e. at civic or sub-regional level). And linked to this, hubs will be responsible for developing and maintaining a corps of tutors with skills relevant to the specific demands of online tutoring and facilitating the growth of course-related learning clusters.

It is important to be clear that Ufi's current proposals for online conferences and learner support measures are all focused around learners who are undertaking a **learndirect** course at the time concerned. Although we believe that Ufi has considered the idea of providing conferences for **learndirect** 'members' who have not yet registered for a course, and/or for 'alumni' who have completed one or more courses, neither of these appear to be firmly planned at this stage.

If the **learndirect** model is geared to 'roll-on/roll-off' support of learning, is there a role for local and regional agencies to keep people 'in the loop' during the gap between learning episodes? And if so, what precisely does 'in the loop' mean? We propose that it should mean that learners are kept in touch with the broader learning infrastructure (including services provided **learndirect** and others), with the capability for two-way communications, which will be most cost-effective if done online.

There are high risks if you just push information at people that they will suffer from overload and will stop paying attention after a while. However, this sense of overload, and the alienation that comes with it, can be overcome to a large degree where information arrives through a trusted channel or from a trusted source. It is one of the key roles of a successful learning cluster that it becomes such a channel for its members: people will pay attention to advice from a trusted friend where they might ignore or be irritated by the same advice/information through a less personal medium.

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## 3 Desk Research

### 3.1 Introduction

Part of the remit of this project was to review the literature to establish precedents for work in building learning clusters in similar and related areas.

We identified four main areas of literature that reflect different aspects of the learning cluster concept considered here:

- Learning Communities in ‘Learning Cities’
- Virtual Communities in commercial marketplaces
- Online tutoring
- Computer-supported cooperative learning

Each of these is outlined in more detail, together with the key principles and guidelines we have gleaned from each area, in the following subsections.

### 3.2 Learning City Network’s Learning Communities Project

The main focus of this DfEE-supported initiative is on building local partnerships, principally among suppliers of learning and learning-related services, as well as employers and other stakeholders. Given that the twin purposes of the Learning City Network are to support lifelong learning and to promote social and economic regeneration, there is a close alignment with the goals of Ufi and of the local and regional partners involved in Ufi hubs. There is little focus in this Network on the online dimension in the documents that have been produced, but there is no reason in principle why the guidelines could not be extended to this arena.

#### Purpose

- “The purpose of the learning community must be to add value to individual initiatives so that the whole is greater than the sum of the parts”.
- Geographic communities should support small, focused sub-communities linked by an interest in a common subject area.
- Learning communities should be ‘social spheres’ in which off-task dialogue and relationship building is considered as valuable as on-task exchanges.
- Communities should:
  - be flexible
  - non-authoritarian
  - have clear objectives without stifling creativity and relationship building
  - empower learners
  - promote peer learning
- The Learning Community “vision” should represent local aims and priorities and not just be a re-iteration of national policy.

#### Development

- Where possible responsibility for a learning community’s management and development should lie with its peers.
- Learning communities should develop along the three interrelated strands of Partnership, Participation and Performance.

#### Partnerships

- To lay the foundations of a learning community is to build new partnerships and reinforce existing ones within groups and between them:
  - Individuals, community organisations and trade unions
  - Providers of education and training at every level
  - Employers in every size and sector of organisation
  - Key agencies (e.g. local authorities, TECs, LECS, Chambers of Commerce, Business Links, development agencies, regional partners)

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- A self-sustaining infrastructure of participation and consultation should be developed.
  - Some shared understanding and agreement of priorities for the community must be reached.
  - Both the professional and public components of a community may need to change and compromise in the achieving of goals.
  - Experts and professionals should make communication with community members accessible and not use jargon.
  - Communities should be consulted to find out the best means of approaching members about plans.
  - Learning Community Partnerships should represent the whole community and not just the training and education sector.
  - Pitfalls to avoid in learning community partnerships are:
    - Spending too long discussing the initiative's aims without actually **doing** anything
    - Hoping for too much too soon
    - Neglecting to evaluate and improve the partnership
  - Barriers to entry (for example bureaucracy) must be kept to a minimum
  - The following strategies may be used for involving communities:
    - Issue-forums
    - Consensus-building
    - Citizen's juries

### Participation

- "Active Citizenship" - real learning communities will involve the public in how their communities should be governed and changed.
- Learning Community initiatives need a number of key elements to progress beyond the embryonic stages:
  - **Key individuals** who believe in the Learning Community idea, persuade others to consider the idea and are powerful enough to give the project credibility.
  - **Key institutions** to help lead and support the initiative – especially important in the early stages.
  - **A core group** composed of key local organisations, forming an embryonic organisation to help get the initiative off the ground. This may be an advisory or steering group.
  - **Wider interests** within the community, promoted by seminars and conferences and monitored by gaining feedback.
  - **Launch events** following a period of development work and consultation.
  - **Key Employers** to maintain a focus on workplace learning and enable them to participate and influence the initiative.
- "Among learning communities, developing consultation mechanisms has been difficult and slow moving. This is not from lack of will but because of the complexity of the process".
- Familiar institutions and networks should be used for meeting points, at least initially.

### Performance

- The learning community should be reflective, constantly assessing how it is changing and identifying potential for improvement.
- Evaluation should be embedded in the strategic planning cycle.
- Performance should be measured against targets achieved, benchmarking of other learning communities, to the extent that relevant benchmarking measures can be found.

## 3.3 Virtual communities relating to commerce sites

The main focus of this recent but rapidly growing literature is on how 'infomediaries' and suppliers can build loyalty with their customers and members. These developments are explicitly commercially motivated, but in the words of Hagel and Armstrong (1997, p116) "community must come before commerce". Here the five characteristics that define virtual communities are

- distinctive focus as to membership (i.e. niche target market)
- integration of content ('published' material) and communication
- emphasis on member-generated content
- choice among competing vendors
- commercially motivated community organisers (on the assumption that commercial motivation will secure a focus on growing the community that couldn't be achieved by other motivations)

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One of the key factors that puts the ‘community’ in virtual communities is that members build up a sense of trust in each others valuations of products and services, based partly on growing familiarity with each other and previous track record of assessments. To the extent that these virtual community techniques have been proved to work (the theory is persuasive, but the practical examples are few), the model could potentially be applied to communities of people interested in learning.

However, we need to sound a note of caution about treating learning as a ‘just another product or service that people buy’. There are some philosophical objections to treating the learner-tutor relationship as identical to customer-supplier, as well as cultural factors that suggest, at least in the UK, that people do not have the same expectations about paying for learning as they do for, say, other leisure time services.

The commercial perspective on virtual communities brings out two particular points that may be transferable to any similar ‘clustering’ initiative:

- The performance of a community should be closely monitored and the information used to help shape its future direction – this includes aggregating data on the usage profiles of members, and feeding this back into the ongoing evolution of the community.
- The skills required to organise a community are as important as any other asset (including other information content and services).

### **3.4 Online tutoring**

This is a broad field which arguably consists of several different schools of thought that are developing in parallel, reflecting the different cultures of online learning in the corporate sector, in vocational training and in higher education. The main focus of the guidance in this field is naturally enough on how the online medium affects tutor-learner relationships. It is clear that the skills required for face-to-face tutoring may be necessary, but are certainly not sufficient for online tutoring. Guidance for online tutors thus concentrates on factors such as:

- How to build rapport with a group of online learners
- Important considerations when giving feedback to learners online (including issues of timeliness, for example, as well as the content and tone of the messages)
- Organisational and technical skills required to guide the learning process effectively
- Setting expectations with online learners – and making sure that they stick to the expectations you have of them
- Facilitating online discussions with learners, and encouraging the development of effective peer support among them

The last of these areas is perhaps most relevant to the fostering and growth of learning clusters. As an example of work in this area, we include a short ‘how to’ article on online tutoring from a multimedia newsletter as an appendix to this report.

One of the key purposes in facilitating online discussions among learners is to encourage them to become ‘active learners’. Learners tend to resist the shift of control over learning from tutor to themselves because with this control comes responsibility for their own learning. Motivation is central to overcoming the resistance to changes in learning delivery. Tutors can cultivate learner motivation by:

- taking on more of a motivational role themselves
- encouraging learners to ‘co-construct’ learning goals among themselves

Tutoring may absorb more time for different groups and at different stages. Tutors may often aim to enhance learner skills of working together as a group, so that the group becomes less dependent on the tutor over time.

Nevertheless some ‘active tutoring’ (to use Ufi’s term) is likely to be necessary, especially in the early stages of a group. Some best practice tips for online tutors include:

- be objective
- encourage participation
- promote private as well as public conversations
- summarise discussions where appropriate
- present conflicting opinions, as impartially as possible
- request responses

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- invite guest experts
  - be supportive

### **3.5 Online facilitation & computer-supported collaborative learning**

This in some ways two related areas, the first one being focused on the practical social skills of facilitating engaging exchanges online, and the latter reflecting on the specific kinds of learning that can emerge from such exchanges. The issues which are addressed in these areas include:

- How to attract people to join an online forum
- Recruiting moderators and facilitators and generating sufficient volume of exchanges to achieve critical mass
- How to be prepared for the kinds of conflicts that can emerge in online communities, and how to respond to them when they happen
- Learning dialogues, and how online discourse can be used to construct new meanings for community members
- How to connect 'communities of practice' and use online exchanges as one of a set of knowledge management techniques for that community

As an example of practitioners in this field, see the Online Facilitation forum at <http://www.egroups.com/group/onlinefacilitation>.

The sorts of guidelines that emerge include:

- Learning providers should explore different ways to draw people into Learning Clusters:
  - offer them a chance to talk to each other
  - offer them a better experience as 'consumers' (e.g. more convenient enrolment, lower overall costs)
  - document previous learners' questions and answers (supporting so-called 'vicarious learning')
  - support community members in their own group projects and 'content production' that is published to other learners
  - identify learners each time they enter the community space, build a learning relationship with them, tailor
- Communities require careful management, organisation, and growth if they are to remain attractive to learners and add value to their learning experience.
- Learning Communities should be used as a forum for peer discussion and debate, not lectures.
- Effective communication and working relationships are more important than up-to-date technology.
- Large communities should have intimate spaces.
- Learning Communities need 'hosts' whose role is to facilitate, encourage and scaffold learning dialogues. Other roles such as information analyst, customer service manager and the like might also be required.
- A community is only as good as the quality and frequency of the contributions that are made by its members.
- Communities should be allowed to grow organically and managers should react positively to change.
- The online medium must add value to the offline experience.
- Community activities must be integrated into more structured learning materials. Content should be integrated with communication.
- Learning goals and objectives should take priority over the installation of up to date technology.
- Online communities must have access to efficient and supportive technical support.

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## 4 Learning Clusters: Practical Examples in the Region

### 4.1 Introduction to the Action Research

Our remit in this project was to explore and document exemplar/pilot learning clusters in one or two sectors. In order to do this we sought first to find potential areas where different approaches to learning clusters could be trialed. The factors we considered in identifying such areas were informed by trying to get a spread across the possible dimensions of learning clusters as shown in Table 1 above, i.e.:

- Related to a formal learning programme, versus a community of practice
- Conducted principally face-to-face, online or using a combination of both

We also wanted to get a spread of contexts across the region, including metropolitan and more rural areas as far as possible.

With these considerations in mind we followed up some of our contacts from interviews in the previous project, and made further contacts with more recent developments through the TEC representatives on the project steering group. This led to us exploring opportunities in some depth with:

- CITINET, Sheffield – one community of practice among learning providers; one group of learners related to a flexible learning programme
- Darlington College, Catterick – group of learners doing an online flexible learning programme
- Business Access Points in North Yorkshire, through North Yorkshire TEC, specifically Whitby Business Development Agency – community of practice related to new IT club focused at local small and medium-sized enterprises

We also had initial discussions with some of the managers of the CELL project in North Yorkshire.

In each of the cases, we had to identify a ‘gatekeeper’ for the relevant partnership, who had access to the decision making forums within that partnership, and ideally could act as a champion for the interventions we sought to make once approval had been given.

In the event, only the two CITINET related clusters got off the ground to any degree, though the reasons why the others did not take off are in themselves instructive and will be considered in the Discussion section below.

We initially approached Mike Cox, Campus Manager at Catterick College, and discussed with him the possibility of working alongside the college’s online tutors in facilitating and acting as participant observers for the first cluster of learners to undertake a particular online course. The college was using its own ‘managed learning environment’ including discussion facilities supported by WebBoard conferencing software (as Ufi will be using).

Unfortunately, after some discussion, Catterick College decided that our intervention could have put too much strain on what was in some ways a pilot programme of learning itself. In particular the College already had a partnership with another local university that was proposing to carry out some evaluation of the initiative, and it was felt that our work might have overlapped unhelpfully with this.

Through further discussions with North Yorkshire TEC we explored alternative options of working with the CELL project or the network of Business Access Points (BAPs) that is being established in North Yorkshire. The BAPs seemed to provide a potential focus for building learning clusters for SMEs (one of Ufi’s target groups) which would include a set of face-to-face activities. Whitby Business Development Agency was selected as the most appropriate case for the purposes of our project.

The examples that we cover in detail in this section are thus:

- CITINET learning centres staff cluster
- Sheffield/CITINET ‘Webwise’ learners cluster

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- Whitby IT Club cluster

Interestingly all these examples were conceived as operating principally online. As stated, it was not our intention to focus exclusively on this medium, and we expected to cover at least one face-to-face exemplar as well. In the event, however, it seemed to be easier for the gatekeepers to whom we were talking to latch onto the potential online component of the learning clusters idea, and present this as an independent and innovative intervention to their partnerships.

Thus the introduction of an Email Discussion List acted as a kind of focus that made the learning cluster concept real and ‘tangible’ to the participants. If we had just observed face-to-face interactions, which would have been none too different from what would have happened without the intervention of our project, then the people we spoke to might have seen this as too insubstantial in terms of added value. The impetus and focus given by the technology – almost independent of the actual value it adds – is perhaps a useful lever that can be used for accelerating the growth of learning clusters, even if they do not expect to be mediated wholly or even mainly online.

It is important to add the slight caveat that the circumstances and timescales of this project meant that our experimentation with learning clusters was bound to be slightly artificial. Since our task was to pilot the concept in a few areas, we did in effect have a ‘solution looking for a problem’. Nevertheless our experiences of the clusters in this project were broadly consistent with our experiences of other, less artificial clusters.

To give a counterpoint to the three case studies generated by this project, we provide in Section 5 brief reviews of two other online learning clusters (one linked to a formal learning programme, the other to an informal community of practice) of which we have practical experience. Although these examples came about completely independent of this project, there are useful comparisons to be made, particularly as these other clusters have been in operation for years rather than months.

## **4.2 The Technology of Online Clusters**

Each of the learning clusters described below uses an Email Discussion List as the main communications medium between cluster members.

Email Discussion Lists are one of the most basic and most common types of group-working technology. The idea behind Email Discussion Lists is straightforward:

- People join (or are joined to) a discussion list
- The members of the list can then send a message to everyone who is on the list by sending out a single email message to a single address. (On some lists, only one person can send messages to everyone, but that is not a real ‘discussion’ list.)

This is achieved by sending the email message to a computer (sometimes called a listserver), which then distributes that message to every member of the Discussion List. There are a number of software packages for doing this (DJA uses two, on different server platforms, called Lyris and LetterRip).

The facility to send messages easily to all other List members allows groups of people to become involved in discussions, just by using their email software. One of the main advantages of Email Discussion Lists is that they are easy to use and do not require special software. The most comparable technology is a web conference (also known sometimes as a ‘bulletin board’), which can be used by anyone with web access<sup>4</sup>. The potential disadvantages of web conferencing are that

- Group members have to remember to visit the conference web site (whereas email comes direct to you) – this is a particular challenge for new groups when people find it difficult to get into the habit of visiting regularly
- The technology can be more difficult to use in that there are buttons within the web browser window as well as on the browser, and this makes for a more confusing user interface than simple email

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<sup>4</sup> In fact recent software packages start to blur this distinction. WebBoard, which Ufi will use, is principally designed as a conferencing system accessed via the web, but users can also participate in the conferences via email. Conversely, Lyris, which DJA used in this project, is principally designed for Email Discussion Lists, but users can also participate wholly via the web if they choose to do so.

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- Members have to be online to read and send messages, and may be running up telephone charges while they do this, whereas email can be read and composed offline.

Any Email Discussion List has to be administered by someone known as the 'listowner'. He or she is charged with setting up the list and configuring its settings in ways that other members do not have access to. A list can be set up in a variety of ways, and before the list is created the listowner needs to think about how they want the list to work.

Typical questions a listowner might ask include:

- Do I want to use the list to make 'one-way' broadcasts or to allow people to talk to each other?
- If the list is going to be two-way, do I want replies going to the sender of the message only or to the mailing list address (so everyone on the Discussion List can read it)?
- Is the list going to be private (people can join only if I allow them to) or public (anyone can join)?
- Is the list going to be moderated (do I want to read and authorise all messages before they go to the discussion list).
- Do I want to allow users to receive a 'digest' (a regular collated resumé of all the messages sent to a list)?

Once a listowner has decided how they want a list to work they then need to configure the listserver software (which may be running many lists at the same time). Most listserver software packages give the listowner a great deal of control over their list. In this project, DJA staff acted as listowners for all clusters.

A discussion list can have two members or thousands of members and there are literally millions of discussion lists on the Internet. Anyone wanting to know if there is a mailing list about an area that is of interest to them should look at one of the mailing list directories, such as <http://www.liszt.com>, <http://www.topica.com> or <http://www.eGroups.com>. For more details of the advantages of Email Lists see the *Wired* article at [http://www.wired.com/wired/6.04/es\\_lists.html](http://www.wired.com/wired/6.04/es_lists.html)

## **4.3 CITINET Learning Centres Cluster**

### **4.3.1 Description of Cluster**

The CITINET Learning Centres are a group of learning centre staff involved in some way in the CITINET consortium. CITINET was founded in early 1998 as a public-private partnership, in response to the Government 'Learning Age' green paper on Lifelong Learning. The founder members were the Sheffield College, Sheffield TEC, and Sheffield City Council.

There are some 68 centres registered with CITINET, either as

- full Learning Centres (open most of the week, at least 20 Internet-connected PCs etc, childcare available)
- Learning Access Centres (open at least 5 sessions per week, at least four Internet-connected PCs), or
- Learning Information Points (at least one Internet-connected PC and/or telephone)
- (There are also three exclusively online offerings listed on the Centres page of the website).

Three of the Learning Centres were, during this project, selected as development centres for **learnirect**

DJA initially approached CITINET (Andy Wynne) in August 1999 to enquire about the possibility of working with them on a learning cluster involving CITINET learners. After positive initial discussions, which identified the opportunities to develop a cluster of Webwise learners (see Section 4.4), the project was taken to the CITINET Steering Group. The Steering Group initially felt that the group of Learning Centre managers and staff would have greater chances of success, as the common interests and bonds between disparate 'Webwisers' are less easy to define and rely on. The Steering Group further hoped that the Learning Clusters initiative could help mobilise some extra impetus and expertise, in the interests of consolidating the partnership between the various learning centres.

To a degree, the 'cluster' of CITINET Learning Centre staff already existed prior to any intervention – at least in the sense that these people had already signed up to some common goals, and were working within the CITINET framework. However, the purpose behind the intervention funded by our project

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was to consolidate this collective identity and use it as a platform for more collaborative learning between the centres.

### **Participants**

Forty one learning centre staff participated from the outset in the online aspect of this learning cluster, as well as twelve further people drawn from the CITINET steering group, other partners (e.g. designers of the CITINET web site) and DJ Associates. A further eleven centre staff were added to the list after they came online in late February. Andy Wynne, the CITINET Manager, did the setting up and maintenance of the list of members of the online cluster. Andy was also responsible for specifying how the Email Discussion List for the cluster should be set up.

The remaining discrepancy between total number of learning centres and number of people in the cluster stemmed from places like the College and libraries where the contacts are 'central' people, rather than staff at the centres themselves. This was seen as a less than ideal arrangement, but one that would be remedied in time, with broader spread of technical facilities.

This cluster, unlike the others in this project, was aimed at a pre-defined 'closed' group of people. That is, it was not possible for anyone to join the cluster 'automatically' by subscribing themselves to the Email Discussion List – to do this required authorisation from Andy Wynne, which was only given to people who had some professional connection with CITINET itself. For the same reason, we did not have to promote the cluster actively, as Andy Wynne simply added the email addresses he had for the centre staff to the Email Discussion List.

### **Collective and Shared Activities**

While some of the staff will know each other (e.g. if a group of people all work in libraries, say, or if their centres are nearby in the same part of the city), there are few activities that all the CITINET centre staff will have shared. CITINET itself has only really functioned as a collective entity for little over a year (less at the start of the pilot). We also need to take account of the fact that staff come from different organisations (e.g. libraries, schools, FE, police, hospitals, private sector), with significantly different cultures and expectations of learning and training. Of course, this is the case with many groups of people who meet for the first time on a training course, but outside of such formal programmed activity, it can take longer for people to converge on a common focus and shared understandings.

The face-to-face events held for CITINET centres have been:

- CITINET Forum (although this has not met since July 1999, when Professor Fryer of Ufi/NAGCELL gave a presentation, due to a succession of failures in getting the desired speakers)
- Review of Webwise implementation with the BBC
- Two Ufi-related meetings for centres involved in the hub
- The public launch of CITINET by David Blunkett in November 1999

About thirty of the CITINET centre staff had attended a 'Developing the Frontline' training event, focusing on customer service in learning centres, with another fifteen doing this in March 2000.

The Email Discussion List is, for its members, the quickest and easiest way to communicate with each other. There is, of course, a lot of other activity that goes on under the CITINET banner. Much of this is coordinated by Andy Wynne and Laura Bennett as the central management team of CITINET. Some of what they do, as well as relevant general news and information, can be communicated via the Discussion List 'channel'.

### **Relationship of Email Discussion List to Other Activities**

It is important to recognise that the Email Discussion List comes on top of a culture that CITINET has sought to establish for open and electronic exchange of information. Thus a large proportion of management documents (including all Steering Group minutes, for example, as well as submissions to Ufi and more general interest prospectuses etc) are publicly available on the website <http://www.citinet.org.uk/docs/>. The way that the CITINET management has 'led from the front' in taking this approach, provides an important set of conditions which should help online learning clusters to flourish.

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### 4.3.2 Roles of DJA and Other Key Players

The key players from the CITINET side in getting this learning cluster going included:

- Andy Wynne, CITINET Project Manager, and the main person with needs to communicate information out to learning centres and to get feedback from them
- Laura Bennett, CITINET Administrator, supporting Andy in general and routine communications
- Seb Schmoller, chair of CITINET Steering Group, who responded to some early questions from learning centre staff with explanations of CITINET's background

Some other members of the cluster also made early positive contributions – these are reviewed in greater detail below.

David Jennings from DJA acted as facilitator of the early part of the discussion. While clearly not a CITINET learning centre, DJA has had contact with a selection of learning centre staff across Sheffield – thus our presence in the learning cluster would have been ‘familiar’ to a minority, but wholly ‘independent’ and ‘external’ to the majority.

After Andy Wynne had sent a few introductory messages to the list, David Jennings sent some messages to provide further background to the Learning Clusters project and the possible uses of the Email Discussion List. One such message, setting a proposed timetable for discussions, is reproduced below.

Date: Wed, 10 Nov 1999  
To: CITINETCentres@forum2.com  
From: David Jennings <david@djassociates.com>  
Subject: [CITINET] Outline Calendar of Discussion Topics  
Reply-To: "CITINET centres' forum mail list" <CITINETCentres@forum2.com>

Dear all,

As promised in my message yesterday, here is a rough schedule for the range of issue we'd like to discuss on this email discussion list over the following weeks.

It is only rough, and I fully expect it to change as the 'conversation' evolves. Any suggestions for additions or changes will be very welcome.

Regards, David

From 11 Nov

- o initial discussion about 'Learning Centres living with each other in the consortium world'
- o I'll also be introducing myself more fully, and some of the relevant work we've done on online communities and learning
- o news of parallel online learning community for Webwise learners

W/c 15 Nov

- o we're expecting the Ufi Brand to be announced this week, so we may share some informal opinions about this
- o possibly more introductions of members of this group, if any of you feel you don't know the others very well already
- o further exploration of consortium issues, including the risks/threats that centre managers associate with working in a consortium like this

W/c 22 Nov

- o Andy may kick off a discussion of training needs of Learning Centre staff

W/c 29 Nov

- o I'll be sharing details of a new web site we're working on to support Learning Centres nationally, and asking for your feedback on this
- o I'll also be asking for volunteers to participate in group project to find more web resources relevant to Learning Centres, and report back to group
- o we'll review how these points relate back to training needs discussion

W/c 6 Dec

- o a week for reflection: what has and has not worked well so far - personal views
- o and also for summarising - I may post some reviews of key points from first few weeks

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W/c 13 Dec

o general discussion on what key bits of advice would you give to a new consortium or Ufi hub that was just starting out now?

W/c 20/27 Dec

o a bit of light relief: a short online game linked to Xmas and the Millennium

W/c 3 Jan

o publication of outcomes of groupwork to date

W/c 10 Jan

o expectations and priorities for the year ahead

Then Andy and I will take stock of where we go from there.

I hope this is clear and looks like an interesting programme of events and discussion. Please don't hesitate to get in touch with any comments.

### 4.3.3 Narrative Overview

The technical infrastructure for the Email Discussion List for this cluster was set up in September 1999, though the cluster was not formally 'launched' until early November.

DJA played an active role in the facilitation of the cluster in November and December (as can be seen from the programme above), and took a slightly more reactive approach in January and February.

The programme above was broadly followed, but with some slippage as the early discussion topics 'rolled on' for some time as members gradually warmed up to the issues.

There has been no direct facilitation of the cluster since early March, but there continue to be a number of messages exchanged among members – see below for further details.

As this was a 'closed' cluster – open only to CITINET learning centre staff – there was little change in membership over the period of the pilot, with the exception of eleven people being added in late February. All members were able to leave automatically at any time if they chose to, but few if any did.

### 4.3.4 Approach and Dynamics of this Cluster

There were three broad themes to the discussions we sought to start in this cluster:

- The pros and cons of the partnership itself
- The training needs of the staff involved
- A more light-hearted and personal touch

In the event, the first two of these worked moderately well, and identified or crystallised some useful issues for the partnership. The 'personal touch' element has only emerged sporadically and idiosyncratically, as different members of the cluster have brought with them different expectations of the level of informality that is appropriate for an online forum such as this.

In a review with some members of the cluster, conducted face-to-face at a CITINET event, some people criticised the 'signal-to-noise ratio' of exchanges on the Email Discussion List, and suggested that more people needed training in good practice in using email. This might include topics such as how to write clearly and concisely for reading on the screen, as well as so-called 'netiquette' issues like not including the full text of a message you are replying to if your response only relates to one small part of it. Conversely, others would see the occasional breaches of good practice in these areas as a positive sign of relaxed informality.

It is possible to see these minor conflicts and uncertainties as typical of the early stages of group development, regardless of the medium in which this is carried out. If the exchanges had all been conducted face-to-face, then some people might have wished for a formal agenda and directive chairing or facilitation of the meeting, while others might have preferred a looser, more exploratory and informal atmosphere.

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The classic model of group development is to divide it into four stages:

- **Forming** - the participants introduce themselves, get to know each other and explore what it is that brings them to work together
- **Storming** - different people start to put forward suggestions for ways and procedures whereby they can collaborate; these suggestions are reviewed, amended, trialed, or countered by alternative suggestions - hence the term 'storming', as in 'brainstorming'
- **Norming** - the group starts to settle on a range of mutually acceptable procedures for 'how we do things around here' and these become formalised, or semi-formalised, as the set of 'norms' that the participants will adopt in their dealings with each other
- **Performing** - having built some sense of coherence and cohesion in how they will work together, the group is now in a position to get on with the job in hand

On this model it would be possible to see the uncertainties and contrasting approaches to the first use of the Email Discussion List as a kind of 'storming'. Out of the tension between different approaches will gradually emerge a consensus and this will define the 'norms' for this particular cluster. (It might then be perfectly possible for cluster members to abide by these norms in this forum, while transferring seamlessly to other forums they belong to which might be more or less formal – they will have internalised their expectations of 'how we do things around here' for each different context.)

Group development is by its nature a gradual and evolutionary process, and it is always possible to imagine how it could have worked out differently. For example, we could have perhaps focused more exclusively on one of the three themes listed above. Alternatively, we could have tied in the Email Discussion List exchanges with some other online activity, such as development of some part of the CITINET web site, or an online course such as the Living IT suite of Internet fluency modules that are run from Sheffield. Ultimately the dynamics of online group relationships are unpredictable, but such speculation about alternative lines of development can be helpful in generating ideas for future directions and 'team building' activities.

#### 4.3.5 Analysis of Exchanges

Here is one example from the exchanges on training needs<sup>5</sup>:

Reply-To: "CITINET centres' forum mail list" <CITINETCentres@forum2.com>  
From: "Andy Wynne" <awynne@wiredworkplace.net>  
To: "Citinet Centres List" <citinetcentres@forum2.com>  
Subject: [CITINET] Training needs of CITINET centres  
Date: Thu, 9 Dec 1999 21:26:47 -0000

Dear all,

Training Needs for CITINET Centres

One of the key issues that has come up in discussions inside the CITINET network (including on this list) is the need for training for people working in the centres. One of the clear potential benefits of CITINET is the creation of staff training provision for centres across the network. The recently-started 'Developing the Frontline' course (which will be run again in the new year), giving basic advice & guidance training for front of house staff was a response to this.

The question I'd like to raise here is:  
What do you think the key training needs of your centre are, and what role do you think CITINET needs to play in helping to address them?

I'm thinking here about training needs of the people who work in the centres, paid or unpaid, rather than the needs of the user communities (although if there's a point you want to raise about provision more generally, feel free!)

Don't feel restricted to the areas above - they're just examples. I'd like to hear from centres about the needs you have. Also, please bear in mind that the answer to training needs may not be as specific as 'courses', but could be more informal, like support groups, forums, interest groups, whatever..

cheers,

Andy  
CITINET Project Manager

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Date: Wed, 5 Jan 2000 04:05:57 -0500

From: [REDACTED]

Subject: [CITINET] Training needs of CITINET centres

To: "CITINET centres' forum mail list" <CITINETCentres@forum2.com>

Reply-To: "CITINET centres' forum mail list" <CITINETCentres@forum2.com>

Andy

Given the drive to an evolving era of ICT would it not be useful to canvass the training needs of Centre staff in terms of Information Technology, with an emphasis on networking issues (hardware and software application). My colleagues that are funded by the FEFC would really benefit from some structured network training, alongside the setting up of support groups in this area.

[REDACTED] ([REDACTED] Adult Learning Centre)

Reply-To: "CITINET centres' forum mail list" <CITINETCentres@forum2.com>

From: "Andy Wynne" <andy.wynne@sheffcol.ac.uk>

To: "CITINET centres' forum mail list" <CITINETCentres@forum2.com>

Subject: RE: [CITINET] Training needs of CITINET centres

Date: Wed, 5 Jan 2000 17:35:17 -0000

Hi [REDACTED] (and everyone else) and a happy new year to you all!

I think [REDACTED]'s hit on a key area here. We're all grappling with the use of this tool called ICT, and no matter how long we've been doing it, there is always plenty more to learn (not least because of the speed at which things are changing). One of the things we have thought about on a number of occasions in the past has been the creation of a technical support group in the way that [REDACTED] describes, to help centres get to grips with the problems that ICT systems create (we tend to very quickly become reliant on them, and so when they occasionally fall over we get really stressed)

One approach to the problem could be to create some form of online technical forum, which could act as a place where questions get raised. I think getting such a thing to work will require getting a number of elements into place:

- i) Getting the user community (i.e. those on this list and those not yet on for various reasons) into the position of having reasonable internet access and the basic skills of using email and the web in order to get good use out of the forum
- ii.) Having enough people on it, and enough people with the right level of expertise to help out with problems, at least in the earlier stages - hopefully it would, in time, move toward a more mutual support situation, rather than the same handful of people fielding all the questions.
- iii.) Supplementing the online forum with regular face to face get togethers, which could operate at a number of different levels, from basic ICT and internet awareness, to more specialist seminars & events around particular applications/systems/issues (e.g. IT policies, network configuration, desktop PC security, acceptable use policies for learning centres etc. etc.)
- iv) Maybe turning the (hopefully growing) knowledge and experience in the network into a useful resource, like a website or web conference containing practical answers to locally frequently asked questions and some simple procedures to help with the basics of learning centre ICT operations. This could also act as a signpost which could provide links into other local and not-so local resources

I don't think we can expect such a forum to answer all centres' technical support needs, but it could play a really useful role in helping centres to share common problems and solutions, one of the main things CITINET was created to do!

I'm also mindful that some things already exist in the city which do some of the above, and might well be interested in collaborating with CITINET, in particular the "Network Users Forum." (you can take a look at NUF at <http://www.nuf.org.uk/> )

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<sup>5</sup> For privacy reasons, we have obscured the names of most participants from the exchanges. The exceptions to this are *all* messages from DJA staff and Andy Wynne (CITINET Project Manager), since these people hold a slightly different status with regard to other cluster members. No other editing of exchanges has been done.

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I had thought of trying to design a 'training needs questionnaire', but it's probably a bit complex and time consuming, so...

I'd like to ask TWO QUICK QUESTIONS

1. Does the approach above sound sensible?
2. In the light of iii), if you could choose three seminars/events that you would like to come to, what would they be on? (don't worry about technical descriptions of the content, just the problems you would like help to overcome!)

Sorry this is so long, I hope it's useful to some of you and makes you want to respond...

cheers,  
Andy

Date: Fri, 07 Jan 2000 08:53:24 +0000

From: [REDACTED]

To: "CITINET centres' forum mail list" <CITINETCentres@forum2.com>

Subject: Re: [CITINET] Training needs of CITINET centres

Reply-To: "CITINET centres' forum mail list" <CITINETCentres@forum2.com>

What Andy suggests based on [REDACTED]'s contribution seems very close to the mark. I am \_sure\_ that if we got started with a technical forum:

- i) plenty of people with helpful knowhow would want to contribute;
- ii) there would be very good scope to write a "killer funding bid" to get some real resources into the forum, and also to get some "top-level" interest expressed in the success of/need for the venture;
- iii) funded or not, such a forum would repay the effort spent setting it up and maintaining it, in improved services, and unwasted time;
- iv) there'd be scope to link the operation of the forum with training and the creation of high skill high value jobs in ICT technical support.

It might be worth seeking to associate such a forum with the "Network Users' Forum" - <http://www.nuf.org.uk/> - which the Sheffield College is a corporate member, and on whose Steering Committee I sit.

Date: Mon, 10 Jan 2000 07:13:54 -0500

From: [REDACTED]

Subject: Re: [CITINET] Training needs of CITINET centres

To: "CITINET centres' forum mail list" <CITINETCentres@forum2.com>

Reply-To: "CITINET centres' forum mail list" <CITINETCentres@forum2.com>

Andy & Forum

I think that the approach is sensible, you may want to canvass users' skills on an informal basis perhaps by telephone.

I would attend the following seminars ( if available); setting up an email account and using the email software to its potential ( email attachments and encoding of files); basic knowledge of networks (LAN & WAN); web site design, terminology and costs of setting up own web site.

Regards

From: "[REDACTED]"

To: CITINETCentres@forum2.com

Subject: Re: [CITINET] Training needs of CITINET centres

Date: Mon, 17 Jan 2000 12:17:40 GMT

Reply-To: "CITINET centres' forum mail list" <CITINETCentres@forum2.com>

Hi Andy and everyone,

Training Sessions:

A web page design one would be good

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And one on really basic systems stuff like moving files and locating files and what to do with error messages and some really, really basic DOS for those of us (dare I admit it?) who have never been outside Windows!

On the subject of web design we are intending to buy some web design software for use in the library - it needs to be Very user friendly and demonstrable by someone ( ME and [REDACTED] ) who is only one or two steps ahead of the users! Any recommendations please

Ta,

Date: Mon, 17 Jan 2000 22:45:06 +0000

From: [REDACTED]

To: "CITINET centres' forum mail list" <CITINETCentres@forum2.com>

Subject: Re: [CITINET] Training needs of CITINET centres

Reply-To: "CITINET centres' forum mail list" <CITINETCentres@forum2.com>

Dreamweaver from Macromedia. Available for Mac and PC.

Version 3 is about to be released and costs ~£300.

But Version 2 is often to be found free on magazine covers and is a very good tool.

You can download it for 30 days free trial from  
<http://www.macromedia.com/>

To: "CITINET centres' forum mail list" <CITINETCentres@forum2.com>

Date: Tue, 18 Jan 2000 06:10:36 -0800

From: "[REDACTED]"

Reply-To: "CITINET centres' forum mail list" <CITINETCentres@forum2.com>

Subject: Re: [CITINET] Training needs of CITINET centres

In response to the message from [REDACTED] I could suggest the WEB page design package 'Front Page' which we use here at [REDACTED]. We also offer a short course in WEB page design using this package. If others are similarly interested maybe we could put on a course in WEB page design for Citinet people and get some FEFC funding for it. Can others let me know if they'd be interested. It would have to be a 21 hour course to get the funding but that makes it still a possibility.

From: "[REDACTED]"

To: "CITINET centres' forum mail list" <CITINETCentres@forum2.com>

Subject: Re: [CITINET] Training needs of CITINET centres

Date: Tue, 18 Jan 2000 14:32:08 -0000

Reply-To: "CITINET centres' forum mail list" <CITINETCentres@forum2.com>

Dear [REDACTED]

I have circulated amongst library/learning centre staff in the College and will inform you of the response. I, for one, am interested.

Regards

From: [REDACTED]

To: CITINETCentres@forum2.com

Subject: RE: [CITINET] Training needs of CITINET centres

Date: Tue, 18 Jan 2000 14:41:40 -0000

Reply-To: "CITINET centres' forum mail list" <CITINETCentres@forum2.com>

I would also be interested in a short course in WEB page design, using Front Page.

We have judged it worthwhile to excerpt this series of exchanges at some length, since it displays several features typical of online discussions:

- 
- The discussion has unfolded gradually, over a period of six weeks (note also from the timestamps that many participants are contributing in time outside the normal working day – showing how these exchanges can work round the rhythms of face-to-face meetings, rather than replacing them)
  - There is a combination of ‘brainstorming’ exchanges, which opens up a range of possible directions
  - Learning and training issues are linked to other issues, such as development of new forums and funding bids
  - One or two ‘threads’ of the discussion get picked up for further exchanges, while others do not generate further (public) discussion
  - A range of possible solutions and resources are suggested
  - Towards the end a potential solution to one issue is proposed and then other members join in to ‘vote’ on the utility of this solution to themselves

Ideally in circumstances like this, one individual would take the lead to tie together all the strands of discussion and feed back to the group the status of each (e.g. discarded, done and complete, pending further information, still ‘live’ and in progress). This adds a sense of coherence to the discussion and gives the full group some recognition for the ideas they have contributed.

#### 4.3.6 Analysis of Key Motivators and Barriers

Unlike the other clusters considered in this project, the CITINET learning centres operate within an organisational context that is pre-defined to some extent. It is possible to separate out the following roles or classifications of members of the cluster:

- CITINET dedicated management and administration staff
- CITINET steering group members
- Staff of **learnirect** development centres (with specific funding and targets separate from wider CITINET context)
- Staff of other learning centres, access and information points

Research on implementing ‘groupware’ systems has shown that it can be very important to analyse the differing efforts and rewards that a system offers to each of those who use it (Grudin, 1990). If the major effort to sustain good communication and cooperation comes from one sub-group, while the rewards are mostly felt by another sub-group, then the system is unlikely to succeed.

The first of the sub-groups listed above has a clear motivation to use the Email Discussion List as an open and cost-effective means of dissemination, particularly about, say, new funding opportunities or learning programmes. And arguably all the sub-groups have something to gain from this kind of communication. Therefore it is not surprising that this is one of the most persistent and regular uses of the Email Discussion List.

The position of learning centre staff themselves in contributing directly to the Discussion List is more finely balanced. They can find out what each other is thinking, seek advice in solving a problem that others may already have solved, or canvass support for a specific issue relevant to CITINET’s operation. On the other hand, particularly at the start of this new forum, a lot of centre staff will have been cautious and possibly even guarded about the possible agendas at work, and nervous about putting their cards on the table, or admitting to ‘weakness’ in having a problem in case others had already overcome this.

It is part of the role of a facilitator to overcome such feelings of caution, and as one example of this, David Jennings received a question ‘off-list’ (i.e. by private email, without it being circulated to all members) from one member about the purpose of the list. He replied privately and asked the enquirer if she would mind the reply being copied round to the full cluster. Once permission was received, David recirculated his reply to everyone, with a prefatory comment to explain how it had come about. The intent here was to establish a set of precedents and cultural values about behaviour on the Email Discussion List:

- It’s OK to ask questions
- You can do this privately, but don’t be afraid of doing so publicly: you may think that you’re the only one who isn’t sure of the answers, but the chances are that plenty of others are in a similar position

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- The purpose of the Email Discussion List is negotiable, and is a reasonable topic for public discussion.

#### 4.3.7 Forecast for the Future

Since early March 2000 DJA has ceased taking an active role in facilitating the CITINET Centres cluster. This has had only a modest impact on the volume of messages being exchanged online, but it has affected their character to some degree. Most of the recent messages have been focused on news items, or requests for feedback, relevant to learning centres. The topics covered have included:

- News of Ufi hub confirmation for CITINET
- **learnirect** TV advertising campaign
- BBC numeracy campaign
- Local older learners campaign
- Resources for Internet filtering (relevant to learning centres ensuring ‘appropriate use’ of their Internet facilities)
- New funding opportunity
- Web-based labour market information pilot
- Consultation on CITINET marketing
- Questionnaire on UK online Computer skills

Many of these topics have been principally ‘for general information’, but many have also invited some feedback or participation from the CITINET centre staff – particularly those on consultation and seeking expressions of interest for new opportunities.

A few messages have sparked public responses from the members, including congratulations for the Ufi hub news, but also criticism for the short notice given for a funding opportunity. It can be seen as a positive development, however, that cluster members now feel that the Email Discussion List is a ‘mature’ enough medium to carry a potentially important debate, holding the CITINET Steering Group to account.

In terms of the nature of the messages, it is noticeable that only one of the topics has been directly aimed at enhancing the cluster members’ skills and knowledge levels. It is quite possible that this dimension of the cluster could be lost if the Email Discussion List is used primarily as a group news and communications channel (email lists are, after all, well suited to this more prosaic purpose). To prevent this, it may be helpful to charge one of the list members with responsibility for distributing information and coordinating discussion related to skills enhancement for the learning centre staff.

Another useful development that might give a shot in the arm to the personal development strand would be to revitalise the face-to-face meetings of the CITINET Centres forum. As mentioned above, these have been in abeyance for almost the full period of this pilot project, for a variety of reasons (this in itself shows the value of the online dimensions for filling this potential void of communication). More external speakers and/or training events would undoubtedly raise development issues which the cluster members could discuss further online.

What does seem clear is that the Email Discussion List is gradually becoming more and more established as a key enabling mechanism for the operation of CITINET. Its continuing use seems assured, and if nothing else, the experience of its use will stand the cluster members in good stead when it comes to supporting other online discussions as part of Ufi operations.

#### 4.3.8 Links to Ufi

The CITINET learning centres are more or less as close as it is possible to get to the Ufi action at local grassroots level. During this pilot project, CITINET was acting provisionally as the Ufi hub for Sheffield (this has now been confirmed), and three of its centres were designated as **learnirect** development centres – a higher concentration than in almost anywhere else in the country.

The Business Development Plan that CITINET submitted to Ufi in February 2000 made explicit reference to the pilot work carried out in this project:

“CITINET already provides a forum for centres to share ideas, identify common problems and develop common solutions. A version of this forum will be developed for the Ufi learning centres and access points, and this forum will link into the wider CITINET structure to ensure

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that awareness of Ufi is maintained. The forum will be in the form of both physical meetings and an online discussion.” (see <http://www.citinet.org.uk/docs/#ufi> to download full document)

The cluster developed in this project is not a formal part of the infrastructure publicly required by Ufi, but it potentially provides a model not just for the learning centre staff but for others involved in **learndirect** delivery. Specifically, we referred in Section 2.5 to Ufi’s proposal for online tutor conferences to develop a community of practice among these professionals. The online cluster we have piloted could have close ties with hub-level conferences for tutors and other learner support staff.

## **4.4 Webwise Learners Cluster**

### **4.4.1 Description of Cluster**

One of the key things that learning clusters should achieve is, as Ufi Ltd puts it, to reinforce the nature of learning as a social activity. We therefore sought to pilot an approach that would take essentially individual learners and put them in a club of their ‘peers’ – people undertaking the same or similar learning experiences – so that they could hopefully deepen and enhance these experiences.

The cohort of people who did BBC Webwise tasters in 1999 seemed to provide an ideal opportunity to try out this approach in that:

- They had all expressed, and acted upon, an interest in learning more about the web
- They had all attended a similar taster session, and had access to an educational CD-ROM
- The Webwise programme was essentially a ‘one-shot’ exercise for each individual, leaving scope for additional follow up, individually and collectively

It was these factors that led us, in early discussions with CITINET’s Andy Wynne in connection with the current project, to identify Webwise learners as a potential constituency for a learning cluster.

Additional factors in favour of this were:

- CITINET was responsible for administering Webwise in Sheffield and had a database with names of everyone who had been through the programme
- As the learners were interested in the web and the Internet, they might also be expected to be interested in exploring the use of an online forum to extend their learning
- A further Webwise campaign was planned for November 1999, so there was scope to build on the initial ideas

Working with CITINET, DJA developed a plan for promoting and supporting a learning cluster focused on this constituency. We agreed with Andy Wynne that the main medium for supporting this cluster would be an Email Discussion List (similar to that used for the CITINET centres in the previous case study) and related web site. This decision was based largely on our joint experience of a successful online cluster run by the Network Users’ Forum. This also focuses on Internet skills (though more at ‘intermediate’ and ‘advanced’ than ‘beginner’ level), and therefore acted as a salient precedent. (Further details of the Network Users’ Forum cluster are given in Section 5 below.)

### **Marketing and Promotion to Potential Members**

Our marketing approach included the following activities:

- Production of A5 handout which was included in CITINET mailshot (questionnaire) to 220 Webwise completers
- Through a BBC/CITINET meeting we handed out about 400 leaflets to CITINET Learning Centres for display on noticeboards/counters etc and inclusion in other handouts
- Through personal contacts with two tutors of IT/Internet-related courses at the Sheffield College, they offered to help promote the
- We sent messages to Network Users’ Forum’s main Email Discussion List, to invite its members to act as online mentors and coaches for the learners

The original proposal was to recruit people to this cluster solely via the list of Webwise learners held by CITINET. However, both batches of flyers (which included a £5 voucher – redeemable on online

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purchases at the Made-in-Sheffield.com web site – as an incentive to join the online community<sup>6</sup>) drew very little response, attracting only around four people. The latter two promotional activities thus had to be implemented fairly rapidly when it became clear that the simple mailshot and leafleting techniques were not going to attract sufficient take-up to make the cluster viable. We had much greater success recruiting by word of mouth from tutors on beginner training courses at the Sheffield College and from other online communities. These recruitment methods diluted the focus of the cluster so that it was not exclusively tied to the BBC Webwise programme, but were essential to ensure that there was scope for a meaningful social experience.

### **Participants**

Once the cluster had been launched, its membership was 39 people, all of whom are interested in learning the basics of Internet usage – this includes the mentors who offered to help answer the questions posed by less experienced learners.

Following the slightly jejune terminology of Internet culture, we refer to the learners in the Webwise cluster as ‘newbies’, to distinguish them from the ‘experts’ we recruited as mentors from the Network Users’ Forum and elsewhere. (Experts is a strong term to use because these people may only have ‘average’ experience – but from the newbies’ point of view the term is meaningful.)

The newbies had limited experience of using computers and may have only just been introduced to the Internet. The Webwise cluster was, for most if not all of them, their first taste of an online discussion forum.

What membership of this cluster offered them included a chance:

- To pose questions to people ‘in the know’ and to other newbies
- To share experiences and grow their confidence in the light of issues raised by, and shared with, others
- And of course, to learn

The experts were people who volunteered help by being available to answering the questions posed. Some ‘experts’ were there to learn also. Many found it good to get back to grass roots level and talk about the basics – this helped reinforce and augment existing knowledge.

### **Collective and Shared Activities**

The newbies had little or no contact with one another prior to joining the group. As stated above, the cluster was originally intended to be aimed just at recent Webwise completers in the Sheffield area, but in the end members were recruited from a broader spectrum. Some sub-groups of the membership may have had some contact with each other from courses at the Sheffield College (by virtue of their common contact with the two lecturers there who helped us recruit members). It is difficult to be precise about how much experience of learning the newbies had. A few had completed the BBC Webwise taster, while another five had completed an introductory Internet course. A few others had attended the Sheffield College’s Mount Pleasant learning centre, but had not necessarily met each other through this.

Meanwhile, many among the expert group already knew each other (at least online, if not face-to-face) from their membership of the Network Users’ Forum (also based in Sheffield). Thus they brought with them a shared culture of ‘how to behave’ in interacting online and answering each others’ questions.

The group exists purely in the common ground of experience and an interest in learning more about computers and the Internet.

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<sup>6</sup> This actually introduced some local problems, since all Learning Centres funded by the local authority officially prohibited use of their Internet facilities for online purchases.

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#### 4.4.2 Roles of DJA and Other Key Players

Andy Wynne of CITINET was the key to providing the initial contact details of Webwise completers, distributing the handout, and monitoring of the group charter. He was also very willing to contribute to the online discussion and share his knowledge.

As stated above, two lecturers from the Sheffield College were also instrumental in promoting membership of the cluster.

The expert mentors who responded to our invitation to join the cluster gave their time and know-how free of charge, and played a significant role in getting the online discussion off the ground.

The Webwise team at the BBC are aware of our cluster, but have only shown modest interest in it. They have consented to us focusing on Webwise learners and adopting their brand to some degree, but have not played an active role at all. If the list proved to be a success then the BBC would definitely be interested in knowing more.

DJ Associates directed all aspects of the promotion of the cluster, including design of the flyers, sending invitations to other clusters, describing the cluster at meetings of the CITINET learning centre staff, and designing and maintaining a web site of useful learning resources.

Gill Osguthorpe of DJA then facilitated the online discussion, including its launch in November 1999. Details of how we encouraged the exchanges are given below.

##### **Use of Different Media**

The main medium used to support the cluster has been email, with nearly a hundred messages being exchanged over the few pilot months.

There have been no face-to-face meetings of the cluster membership, mainly because we judged that there would not be sufficient participation to make it worthwhile organising such an event. This judgement was on the basis of the relatively small membership, and the modest proportion who could be expected to give up time to attend a first meeting. This is of course a chicken-and-egg problem in that meetings can be useful to give a significant boost to an online cluster, but only if the cluster has sufficient momentum or energy behind it to sustain a productive meeting.

The other main medium used was the web. The BBC does have its own Webwise site (<http://www.bbc.co.uk/education/webwise>), but this was not sufficiently meaningful for the cluster concerned here, on the grounds that

- only a few of the members had direct experience of Webwise as opposed to alternative Internet-related training
- the Webwise site supports the whole of the BBC's programme and may therefore be felt to be 'impersonal' by any one local group

We therefore developed our own web learning resources site dedicated to the local Webwise cluster. This can be seen at <http://www.forum2.com/conferences/Lists/Webwise/>. The integration of this site into our overall approach for the cluster is given below.

The only use of paper in this cluster was for the promotional flyers that we designed and distributed. Gill Osguthorpe also used the telephone extensively in the early part of the clusters life, because this was a much more immediate way of persuading certain key intermediaries (such as the Sheffield College lecturers) to help out in promoting the cluster. It was also useful to talk to new members by phone, to reassure them about any concerns they might have about joining and participating (although at least two people still declined to take part because of fears about using email extensively).

#### 4.4.3 Narrative Overview

The Webwise cluster was launched in November 1999, once we judged there to be sufficient members to make it viable.

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Nearly a hundred messages have been exchanged online. DJA have initiated some web and email-related activities, including introducing each other, and then compiling a web-based map showing the spread of locations where people in the 'community' live. We have also prepared a web-based 'resource' bank, which supplements the BBC Webwise site.

The list is also used by Webwise learners to pose questions about use of the Internet and general hardware and software issues, and these are then answered by the volunteers. This is expected to be the principal focus of the online community in the future.

Activity has tailed off dramatically since the end of the programmed facilitation activities in February 2000. The likely reasons for this are discussed below.

#### 4.4.4 Approach and Dynamics of the Cluster

##### **What facilitation ideas did we try out?**

As facilitator of the Webwise cluster, Gill Osguthorpe welcomed all new members individually, by private email, to make them feel less anxious or nervous about joining, and to encourage them to take part. This kind of personal touch can be very important, especially with online discussion novices, as it makes them feel that there is at least one person out there in the cluster with whom they have had some individual contact.

We waited until twenty three people had joined before 'launching' discussion, as there seemed to be no point in beginning a discussion forum with insufficient numbers of members. Later joiners thus missed the launch, but still received a personal welcome, and were able to view the 'archive' of exchanges up to the point where they joined (accessible via <http://www.forum2.com/go/webwise>), so that they did not have to miss out on anything.

Gill asked everyone write a message to the group to introduce themselves, with the idea that this would serve as an 'ice breaker' for further discussion. Members' introductions were posted on the web site so that anyone could refresh their memory of other people's backgrounds and interests at any time<sup>7</sup>. Gill further added a little twist to this by inviting people to specify (in broad terms) where they lived and worked. This information was used as the basis for an online map showing the 'coordinates' of cluster members across Sheffield<sup>8</sup>. This is a facilitation technique that has been reported in the literature to be effective in building other online communities because it gives the group a shared picture of their relative position to each other (albeit that this spatial representation has little or no meaning in the context of the business being conducted in this cluster).

As with the CITINET Centres cluster, we proposed a schedule for discussion themes, as we thought this might help focus people on particular areas to get them trying things out together. We also hoped this could work to provide a cycle of learning. In other words, after learners had gone through all the themes they are, in principle, no longer newbies and may choose to either stay as experts or move on to a 'higher level' cluster, such as the Network Users' Forum.

##### **Web-based Publication of Content**

The CITINET Centres cluster already had a web site that the members could feel more or less that they 'owned' – certainly their contributions to it were encouraged, and the site existed in part to reflect the collective identity of all the centres. By comparison the Webwise cluster had only the rather remote and impersonal BBC Webwise site, so we set about creating a site specifically for this cluster, comprising a free online resource, including areas for them to recommend websites, to reinforce commitment and sense of belonging to a group. The site may be viewed at <http://www.forum2.com/conferences/Lists/Webwise>

While the site exists partly to be a practical resource to the learners in the Webwise cluster, this is not its sole or primary purpose. There are many other web sites providing links to learning resources for Internet 'newbies' (many of them are themselves linked from the site that DJA created), but the key to

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<sup>7</sup> The members details may be found at <http://www.forum2.com/conferences/Lists/Webwise/Cybrarymembers.html>

<sup>8</sup> The map is accessible on the web at [http://www.forum2.com/conferences/Lists/Webwise/sheffield\\_map.html](http://www.forum2.com/conferences/Lists/Webwise/sheffield_map.html)

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this one was that the cluster members could provide feedback and make suggestions to help improve it. This in turn would increase their sense of ownership of the site *and* give the cluster a focus of common endeavour around which they could develop a community identity. To provide some recognition and reward for making suggestions, the site made a public acknowledgement of who contributed what ideas to its content – see <http://www.forum2.com/conferences/Lists/Webwise/cybrarysearch.html> for example.

Unfortunately the response from the cluster members was not as energetic as we had hoped! Such feedback as we received about the web site was helpful and constructive, but there was not very much of it. This is a common problem in the early stages of online group development: when someone asks a 'general' question (i.e. one that anyone could answer), many people leave it to take the others to take the initiative first. In the absence of eye contact, no-one is prompted or feels pressured into responding. The lack of response was exacerbated by the fact that Gill, as lead facilitator for this cluster, was incapacitated from chasing up responses for a period by ill health.

#### 4.4.5 Analysis of Exchanges

There were several instances in the Webwise cluster of the kind of exchanges we were expecting among members, where one member reports a problem, and others chip in with a solution and related learning points (indeed, these were the sorts of discussion we designed the service around). As an example, consider the following exchanges.

From: "██████████"  
Subject: [webwise] Re: Rejecting contact  
Date: Tue, 21 Dec 1999 20:31:57 -0000  
Reply-To: webwise@forum2.com

Many apologies for several test messages etc  
Couldn't get PC to tell me it had sent them - in fact thought it hadn't - they were not in 'sent' box

I'd been trying to respond to ██████████'s responses re new folders and Photos webwise told me the message was too big and returned it - I edited it and tried to send again but no luck and the whole thing seemed get stuck in a loop.

I guess that's when all the testing messages went - tried several - but no dialogue box other than the webwise 'return'.

Stopped it (hardly dare say 'solved') by having to 'delete' and then having to empty 'recycle bin' !!

Seems OK now  
MANY THANKS

Date: Wed, 22 Dec 1999 11:35:56 +0000  
From: Gill Osguthorpe  
Subject: [webwise] Re: Rejecting contact  
Reply-To: webwise@forum2.com

At 8:31 pm +0000 21/12/99, ██████████ wrote:

> Many apologies for several test messages etc

No worries! Please continue experimenting and being adventurous every now and then. It's the best way to get to grips with the technology.

Regarding the problem you had with the list...

> I'd been trying to respond to ██████████'s responses re new folders and  
> Photos webwise told me the message was too big and returned it - I edited it and  
> tried to send again but no luck and the whole thing seemed get stuck in a  
> loop.

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I've increased the maximum "size" of message which the list accepts so hopefully people won't run into this problem again. Whilst we're on the subject of message size there are netiquette rules applying to what you should and shouldn't send to mailing lists, especially where attachments are concerned. There are bits and pieces on the web about this and other netiquette advice. Here are a couple of pages which I know about, but no doubt there will be much more on the Web e.g. the BBC WebWise site.

In the Netiquette handbook <http://www.albion.com/netiquette/book/0963702513p53.html>  
and in the guide to Effective email <http://www.webfoot.com/advice/email.format.html?Email>  
Does anyone have any tips about netiquette or pointers to good information resources?

Cheers,  
Gill

From: "[REDACTED]"  
Subject: [webwise] Re: Rejecting contact  
Date: Wed, 22 Dec 1999 14:56:27 -0000  
Reply-To: [webwise@forum2.com](mailto:webwise@forum2.com)

> Does anyone have any tips about netiquette or pointers to good  
> information resources?

And there's also  
<http://www.learnthenet.com/english/index.html>

and so on, with other resources also being volunteered.

Note that, in terms of group dynamics and relationships, there are several different strands going through these exchanges, particularly through the second message. Research on the social psychology of groups (e.g. McGrath, 1990) suggests that there are three types of exchanges necessary to support any group working on common goals over time:

- Task support – actually getting the job done
- Member support – rewarding and encouraging the members as individuals
- Group support – building the identity and well-being of the group *as a group*

The first and third messages focus almost exclusively on 'task support' – the particular issue at hand – while the second one introduces elements of member support (encouraging the member concerned with reassurances of 'no worries' and 'please continue experimenting'). The exhortation to continue experimenting also sends a message to the group as a whole – setting a tone for the group, as we also saw in the CITINET centres cluster (see Section 4.3). And the final open-ended question, 'Does anyone have any tips...' draws the rest of the group into what could have otherwise just been a private exchange. This makes the individual member's issue a group concern, and reinforces the sense that 'we're all in this together'.

Clearly the other community-building exchanges of sending personal introductions/biographies, specifying work and home locations, and having a group web site to reflect these characteristics of the members all also functioned as 'group support' to reinforce the coherence of the cluster.

#### 4.4.6 Analysis of Key Motivators and Barriers

As with the CITINET centres cluster, it is instructive to consider exactly what the different kinds of member stood to get out of sending messages to the Webwise Email Discussion List. We have already considered what the newbies might get from membership of the cluster in terms of answering both specific problems and general learning and awareness.

One further barrier for newbies was their relative lack of familiarity with online discussions. We deliberately chose an Email Discussion List (as opposed to a web-based conference/bulletin board) because email is one of the simplest technologies to get used to on the Internet. However, there remain both technical and cultural barriers for new users to overcome. This is graphically illustrated by one anecdote where a new user actually sent his autobiographical introduction for the initial 'teambuilding' exercise by fax rather than email to Gill Osguthorpe, so that other members would not be able to see it!

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The rewards for the expert mentors were more subtle, and would probably have been related to the general sense of being part of social group and sharing issues, rather than what they stood to learn about the issues directly. Being more experienced, they could have expected already to know of most of the issues likely to be raised. Since many of the mentors were recruited via the Network Users' Forum, they might have expected to get the same kind of networking and mutual aid benefits from this cluster as from the Forum.

Perhaps reflecting this 'social' focus, the areas that got most participation in the online discussion were:

- The introductory mini-biographies of cluster members
- The map of members' locations
- the discussions that came out of newbie posting a problem/question.

With the exception of Gill Osguthorpe as a facilitator, no one individual member of the cluster played a catalyst role. Such roles are best taken by one of the 'lay' members, rather than one of the official organisers and facilitators of a cluster, since the former have more scope to be outspoken or individualistic in their approach. While outspoken contributions can introduce risks of conflict among members, they almost always generate some energy from the different ways in which other members respond to them.

The lack of such a role, combined with Gill's forced absence from facilitation on health grounds, meant that the energy level of this cluster could dissipate quite quickly. Once the 'organised' social and group support exchanges were complete, the input to the cluster relied mainly on the newbies posting new issues and problems for resolution. The risk under these circumstances is that online discussions then go into a cycle of decline. When there are few exchanges taking place on the Email Discussion List, many members more or less forget that it's there. Then, even if they do hit an issue that could be sent to the cluster for discussion, they forget to do this. This means that exchanges become even less frequent, and so on.

#### 4.4.7 Forecast for the Future

The lack of new energy sources for the cluster, combined with the delicate balance of what people actually look to get out of contributing to it, has left the cluster particularly vulnerable to atrophy. At the time of writing, it has been effectively dormant for two months, though the email and web infrastructure that support it are still available and in perfect working order.

DJA's remit for facilitating this cluster as a pilot did not extend to facilitating it indefinitely, and therefore the ongoing use of these resources seems to depend on some other agency taking over responsibility for its animation, presumably as part of some larger, sponsored initiative. Possible candidates might be BBC Webwise, or, more likely, a local initiative from CITINET or one of its partners.

Such an initiative could be linked to Internet foundation skills training, delivered either online or offline. CITINET partners are able to offer both kinds of delivery, and the interplay between online and offline activities could be used to build a much stronger and more sustainable cluster. This could also be linked to **learnirect** offerings in this area, of which there are expected to be quite a few (including BBC involvement).

#### 4.4.8 Links to Ufi

##### **Opportunities**

It is not entirely clear how the Webwise cluster as currently conceived would fit into the Ufi framework for online conferences described above (Section 2.5). It is not linked to any particular course, but could conceivably be construed as a 'learning conference' in Ufi's terms, where learners can undertake groupwork.

Alternatively – and this seems to us potentially the more fruitful approach – the Webwise cluster could be used as a hub-sponsored facility to complement its **learnirect** (and other) offerings. This would mean that the cluster was outside the Ufi-owned infrastructure, but still entirely supportive of Ufi aims (and indeed pledges). The benefit to the hub would be that it got more repeat business from its learners, thus

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both fulfilling its lifelong learning mission and maximising its financial return from taking a cut of fees for **learndirect** (or other) courses.

One way in which this could work is that anyone who undertakes a basic Internet course which is administered by a hub in the region would be invited to join the hub's Internet 'newbie' online cluster at the same time. This invitation would be extended whether it is an online **learndirect** course, a face-to-face college course, or something else that they enrol on. And membership of the cluster would be 'lifelong' – you do not have to leave at the end of your course, though naturally you *can* leave at any time you choose.

This cluster would then keep learners 'in the loop' for related learning opportunities. The incentive to stay involved would be that members would continue to have a resource for problem solving and awareness raising about new Internet techniques. Over time, they would also value the social and community contact with peer learners. The hub would be able to use this channel for periodically sending information about new 'progression routes' for learners with basic Internet skills, for example:

- A new **learndirect** course
- A more traditional course
- Professional updating events (e.g. meetings of the local British Computer Society branch)
- Special offers and tie-ins with providers of Internet related services, as negotiated by the hub or by Ufi
- Options for joining more 'intermediate' or 'advanced' online clusters

### **Barriers**

The potential attractiveness of this option should not obscure the lessons we have learnt about likely problems in implementing it. Perhaps most significant among these is the cost to the hub of having someone available to facilitate and animate the cluster and maintain any related web pages (the cost of the technology infrastructure is negligible<sup>9</sup>). We have shown that it is possible to recruit friendly mentors, who at no stage expected any payment for their services (although it is dangerous of course to take such people for granted). However, we found that when the facilitator role was withdrawn, the cluster quickly became inactive. This might have been different if the pilot period had been longer, and the cluster had been able to establish more of its own momentum, but the investment of time from a skilled person (or people) is nevertheless significant.

Whether or not there is a strong business case for making such an investment is hard to say at this stage of Ufi development. Hub staff will need to review their own business models and estimate the potential impact of introducing learning clusters for specific groups of learners. Some pointers to developing such business models are provided in Section 5.

A second problem that we hit with our pilot cluster was that a proportion of the members were not experienced enough in use of Email Discussion Lists and online exchanges to feel confident about playing an active part. This problem should not be overstated, since some members manifestly did contribute, and clearly got some value from the response they received. However, there is perhaps a lesson to be learnt about which groups and levels of learners it is reasonable to expect to take an active part in online clusters. If we had focused on a group who were not beginners on the Internet, we should have got a better, or quicker response.

## **4.5 Whitby IT Club Cluster**

### **4.5.1 Description of Cluster**

As well as the CITINET and Webwise learning clusters we explored the possibility of developing another online community, the characteristics of which would, we hoped act as a contrast to the approaches adopted in the other contexts.

As noted above, our discussions with Darlington College fell through more or less at the final hurdle, and this meant that we had to go back to our North Yorkshire TEC contacts to explore other options. In

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<sup>9</sup> At the most rudimentary level, the full Email Discussion List infrastructure we provided for the Webwise cluster could be more or less replicated using the free services of eGroups.com. Many free hosting services for web pages can also be found.

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November these discussions led to us to explore links with Whitby Business Development Agency. After further exploration with the relevant stakeholders we decided that an online forum to support the IT development of local businesses would be a good focus for a new learning cluster.

This was to be, in some respects, a variation on the Webwise cluster in South Yorkshire except that the focus was to be more on SMEs rather than domestic users. It was also our intention that this cluster would have both online and offline activities. The online dialogue and exploration would be partly led by the offline activities of the Business Development Agency's soon to be launched 'IT Club'.

This cluster also differed from the others in that we were effectively introducing an online discussion facility into a 'greenfield' site. That is to say, prior to the launch of the IT Club and the Email Discussion List with which we proposed to support it, none of the expected members had necessarily had any shared experience or any contact with each other. Some of the members of the IT Club might meet on the evening of the launch, and share the experience of the launch, but others might not even have this modest level of contact. We were working on the assumption that business people attracted to an event relating to IT would share sufficient interests for them to coalesce into a meaningful group in time.

### **Marketing and Promotion to Potential Members**

On 8<sup>th</sup> February Jonathan Grove of DJA gave a short presentation to around 50 representatives of the Whitby business community about the Email Discussion List. The subjects that he covered were:

- What is a discussion list?
- What are they for?
- What is the Whitby list for?
- How do I join?

Attendees were also given handouts, which supplied them with more details about the list, and copies of the information included on the presentation slides. The overarching purpose of the session was to encourage enough members to join the list, so that it could function as a small group (a minimum of ten representatives from North Yorkshire SMEs was decided upon as the point at which an online group might be considered viable).

Later on, we circulated a number of single page flyers by sending them to our local partners, who left them at key points in Whitby town. These flyers were of a similar format to those that were distributed as part of the Webwise cluster initiative and 200 copies were produced and distributed.

### **Target Audience**

Our characterisation of the target users was based on information supplied by North Yorkshire TEC. Inevitably this is a generalisation and will not capture the diversity of the audience. However it provided a very useful way to focus on the particular challenges that the development of the Whitby learning cluster might present.

Based on this description we tried to anticipate the kind of issues that working with this audience might raise. We saw the following as potential barriers:

- Users are likely to have a low level of understanding of group working technology, and indeed IT itself.
- They may not appreciate that group communication online exists, and have little sense of the potential of the technology.
- They may be inclined to see some local businesses as competitors (this might be particularly true among hoteliers) and therefore be disinclined to share information.
- They may be cynical towards a 'free' service and may assume that there is a 'catch'.

Given these difficulties we felt that we would need to be very proactive during the launch phase to build up a 'critical mass' of users. We learnt that there was to be a launch event for the IT Club in Whitby and we felt that this might be a good opportunity to present the club to members. The value of these kinds of face to face events as a way to overcome initial problems with building online communities is well documented and widely used.

Before attending the launch event we had to determine which technology we should use to support the online activity. As in the case of the other two clusters, we opted for an Email Discussion List (with web-based archive and administration) as the core technology for supporting the proposed learning

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cluster. We chose this option because email is generally familiar to even the newest Internet user, the technology is easy to use, and the 'push' nature of email (messages are sent directly to the members' email accounts) helps ensure that the online community doesn't fail because users 'forget' to visit it.

#### 4.5.2 Roles of DJA and Other Key Players

Lois Carter and Margaret Simmonds of North Yorkshire TEC were key players in brokering the relationships to get the cluster started, with DJA working closely with Lois to try and kick start the community. The success of the project was to some degree hampered by our collective failure to build sufficient understanding and commitment to the online learning cluster approach among key individuals at Whitby Business Development Agency (BDA).

The Whitby BDA has around 200 businesses with a need for IT training and would benefit from improved communications to encourage learning and enhance the community as a whole. Mike Hutchinson of The Conversion Company was the 'sponsor' and our main contact with the group.

As with the other clusters, our main role was to promote membership of the cluster to the target constituency – working with local partners – and then to facilitate and animate the online exchanges. We provided the technical infrastructure for the Email Discussion List for the cluster.

#### 4.5.3 Narrative Overview

We selected the Whitby IT Club as the preferred candidate for our North Yorkshire learning cluster in November 1999. Unfortunately, the date for launching this club slipped from January to February 2000, putting even more pressure on our already tight project timescales.

The Email Discussion List infrastructure was established in January, and some of the key stakeholders (including several North Yorkshire TEC staff) started to use it from then. The cluster was officially launched with our presentation to the first Whitby IT Club meeting in February.

The response from the launch was very disappointing, with only one member joining as a result of this. Once it became apparent that the initial attempt to promote the cluster through the IT Club launch event was unsuccessful we then decided to circulate a number of single page flyers. However, again the response to this exercise was low with it attracting just one new member, which left the Whitby online community well short of the minimum ten members that we believed we needed to attempt to create a viable community.

By this time the project was moving into its last few weeks of field research and we felt it was unlikely that the Whitby BDA cluster would provide any further material for this report within the timescale of the project. At the end of February we regrettably had to abandon this cluster.

#### 4.5.4 Approach to the Cluster

In assessing the potential success and unique challenges of implementing this cluster we considered a number of issues.

##### **Purpose/Outcome**

The objective of the cluster was to support development of computer/Internet skills and knowledge among SMEs in Whitby and surrounding area by encouraging information exchange, resource sharing and mutual support. One of the exemplars for our planned intervention was the South Yorkshire based Network Users' Forum (<http://www.nuf.org.uk>) that we had been involved in since its inception in 1995 (see next section for further details of this).

It was our hope that the seeds for an equally successful resource might be planted by:

- Locating with the activities of Whitby BDA IT Club to continue to support learner development outside any club activities.
- Promoting the activities of Whitby BDA to existing and potential clients
- Running a program of 'online' events over a two-three month period, the intention of which was to guide learners in the exploration of a range of new technologies.
- Developing an online 'shared resource area' that learners could build into a collective library of web links and other materials.

The outcome of our activities was, we hoped, to be a self-sustaining community of users who would continue to support and develop the resource long after our initial intervention had taken place.

### **Type of Member Interactions**

Broadly speaking we anticipated that the kind of interactions that might take place between list members were most likely to:

- come in the form of question and answer
- focus on relatively discrete topics
- be generated by list members and the list facilitators
- be almost exclusively held online (with some overlap with IT Club activities).

### **Time Frame**

The initial time frame for the Whitby element of this project was between two and three months (February to April 2000). This fitted with the overall project plan and, we hoped, would be long enough for the community to become established and for us to run (if required) a meaningful program of discussions for subscribers. Once the list was large enough to function as a 'group' (our notional figure was ten members<sup>10</sup>) then we planned to prepare a list of discussion topics that could be used to support dialogue over a two to three month period. These topics were to be decided by list members, however as a fall back we drew up a timetable that could be used if member input was low.

This proposed timetable is reproduced below. For each theme in each week, the intention was that the facilitator would first post a 'schedule' for the forthcoming week's discussion, and then 'harvest' the messages at the end of the session to draw out salient points and add them to a set of shared web-based resources for the cluster members.

<b>Week</b>	<b>Event</b>
1	Action: Facilitator posts a welcome message and brief itinerary for duration of project. Topic: Request introductions from members. Topic: Icebreaker – Call my bluff (information retrieval game).
2	Theme – General Web Issues Topic: potential benefits to members of using the discussion area. Talk about what rules might be needed to help the functioning of the group.
3	Topic: Experiences of the Web - A 'scattershot' email intended to get some sense of what people might like to talk about.
4	Theme – Using Email Topic: Using email. Potential subjects include – filters, attachments, the differences between mail programs. Using cc and bcc.
5	Theme – Health Check Topic: How are things working so far. Subjects might include - what might be changed in order to improve the functioning of the list. What is working well? How is everyone feeling? Do they think the cluster is valuable? How might things be improved? Action: Privately email group members who have contributed very little (or not at all) and invite them to become more involved.
6	THEME – The Importance Of 'Netiquette' And The Role Of Rules And Governance
7	Theme – Using Your Web Browser Topic: Getting the most from your Web browser. Potential subjects include – bookmarking, URLs, comparison of different browsers Topic: Link Exchange. People post their favourite URLs.
8	Theme – Using The Internet To Do Business Topic: Potential role of the Internet in small business activity.
9	Theme – Marketing And The Net Topic: How an SME might use the Internet as a marketing tool.
10	Theme – E-Commerce. Pro's, Cons And How To Get Involved. Topic: E-commerce - how might it impact on the activities of North Yorkshire businesses.

<sup>10</sup> This is quite a low figure when one considers that the general assumption is that 40% of group members 'lurk' (i.e read messages, but do not post messages themselves). The success of a group that only consists of ten members would very much depend on how 'vocal' those members are.

11	<p><b>Theme – Wrap-Up And Passing The Baton</b>  <b>Topic:</b> Any questions that have yet to be answered.  Facilitator reminds group members that facilitation/ownership of group is soon to move to someone else. DJ Associates' role in facilitation of community ends.  Group continues to exist and develop under steerage of another facilitator.</p>
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This timetable represented a combination of topics for discussion and facilitation techniques. The programme was designed to lead members from basic Internet literacy through to an exploration of more complex issues such as e-commerce.

From the perspective of facilitation, the timetable contained a number of key elements that were intended to support group interaction. The first of these was the posting of an image, produced to represent the location of group members in relation to each other. This was intended to help build group identity by giving group members a way of visualising their relationship to each other. This helps towards removing the anonymity of email by introducing physical attributes to online personalities. Also, if a map was used then this could act as a stimulus for 'small talk' among group members. It was hoped that this activity, combined with the presentation at the launch event would help overcome the initial communication barrier that might result from the group members' lack of physical presence and the negative effects that this might have on communication.

Other facilitation techniques included the production of regular summaries to draw out themes and weave discussions together, and weekly itineraries to help users with limited time determine the relevance of the community events to their areas of interest.

### **Expectations, Guidelines, Rules and Governance**

As the target audience were likely to be inexperienced Internet users, we decided that any establishment of guidelines for interaction would be done as and when they were needed. This was because:

- attempting to impose rules early on might act to stifle discussion
- creation of an effective process of governance and the need for any rules should really be led by community members so that they feel 'ownership' of those guidelines and understand their value

However it was our intention to lead a discussion on 'netiquette' early on in the life of the community, and indeed, an understanding of this may well of been enough to ensure that community members were sensitive to the issues communicative issues raised by online discussion.

### **What other approaches might have been possible?**

As has been noted, the learning cluster did not develop as we had hoped. This can be attributed to a number of factors including the limited technical knowledge of the target audience, and the 'top down' rather than 'bottom up' approach that we had to adopt because of the time constraints of this pilot.

We anticipate that the effective development of a learning cluster of this type would demand significant long term input from an 'evangelist', and much of this activity would involve the careful development of offline group coherence and identity, and a focus on the development of the right technical skills in the target audience. One approach would be to:

- find an established business focused group in the locality and approach them with the offer of setting up an email discussion area to support their activities.
- subscribe those list members with email addresses and supply email access for those without email
- ensure through a series of workshops or other events that group members understand the technology and its potential value.
- establish a series of topics for discussion but encourage and facilitate free discussion between list members
- promote the list (and by association the group) using paper based media and word of mouth
- Identify evangelists and suitable facilitators. Encourage these individuals to the fore and support their development.

Whatever approach is adopted, we recommend that an Email Discussion List be built on the foundation of an established group, unless there is a long-term commitment to grow the cluster, and the resources to support this commitment.

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#### 4.5.5 Analysis of Key Motivators and Barriers

The presentation that was held at Whitby BDA was successful in attracting only one new list member, and this we believe can be attributed to a number of issues:

- The technical inexperience of the target audience. The general sense was that the audience may have enough to deal with where using their computers for supporting basic business administration is concerned. The concept and use of online discussion tools may have been too advanced for them at that time. It is possible to get these kinds of users involved in an email discussion group, however the initial input from an 'evangelist' is likely to be heavy and our geographic separation from Whitby and the budget of this project made it impossible for us to become deeply involved in educating users and 'selling' the service.
- Attempting to create a community in a 'top down' manner (i.e. by artificially drawing people together) is much more challenging than creating a community whose raison d'être is led by the community members themselves.
- The IT club as an entity was not well established, and it is possible that the initiative may be unsuccessful, adversely affecting the discussion list that it is associated with.
- The organisers of the IT Club event were not users of discussion lists themselves and were unfamiliar with the technology, consequently they were unclear on how it might fit with the club's activity.
- The notion that discussion, information exchange and dialogue is a valuable route to learning tends to be associated with higher education, and we surmise particular subject areas such as arts and humanities. It may be that people who have no experience of HE, or people from more technical backgrounds may be less inclined to understand the link between 'talk and learning'.
- Although email is, for most, not daunting technically, the culture of email may be difficult to understand for those people who have spent years associating the written word with formal business communication.

The concept of an offline club as an 'anchor' for online discussion remains valid, but for the Whitby model to have succeeded one or more other factors were necessary to encourage the cluster's growth and development, for example:

- The dynamics and membership of the offline group need to be well established before the online element is implemented
- The potential target audience for the online discussion list need to be technically aware
- Members must understand the value of being able to share information via email
- They should understand that learning can emerge from dialogue and discussion, not just from books, CD-ROMs and other learning materials
- At least some members need to have a degree of commitment to the community in order to make it work – more than one 'evangelist' is needed
- Greater motivation and awareness of rewards of participation among group members
- Group members must see computers as a medium for communication rather as a tool for information retrieval and processing
- Group members must share a common focus

Even if the response to the Whitby initiative had been greater, transforming the members of an online discussion list from being a collection of individuals, into being a group is a major challenge. In the context of the Whitby learning cluster a number of elements were missing and a number of barriers stood in the way of making the list a viable community.

#### 4.5.6 Forecast for the Future

We came to the conclusion that, within the timescales of this project, this cluster was not viable in its online form. The reasons for this, as given above, are instructive. They are not insuperable. The example of the Network Users' Forum (detailed in Section 5) – which we saw partly as a model for the potential of the Whitby IT Club – shows that it is possible to engage small businesses in an online cluster, starting from scratch.

However, if this potential is to be realised, a number of conditions have to apply:

- Significant long-term commitment from the sponsoring organisation to growing the cluster, including both face-to-face and online activities
- Involvement of a facilitator for online exchanges, plus one or more evangelists who believe in the potential of the cluster and are willing to invest their time and energies in bringing this about

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- Full exploitation of synergies with related initiatives which might have benefits for the target audience (e.g. with other local business clubs and business support initiatives)
  - Links to other learning resources and courses that build confidence among the target audience in participating in online discussions and online learning

The implementation of Ufi/**learnirect** provision in Whitby could provide the context for meeting these conditions.

#### 4.5.7 Links to Ufi

The Whitby BDA cluster potentially overlaps significantly with Ufi/**learnirect** operations, in that both ICT skills and SMEs are among the central target areas for Ufi.

In principle, then, this cluster could operate as complementary and supportive to the implementation of Ufi around Whitby, in a similar way to that we proposed the Webwise cluster (see above).

In practice, however, it seems the barriers for achieving this may be higher than for the Webwise cluster. Key factors which might make it possible to overcome these barriers include:

- Greater maturity and establishment of the IT Club in its offline, face-to-face incarnation
- More links with intermediaries and potential supporters (similar to the unpaid mentors we recruited for the Webwise cluster) at a local level in Whitby – where DJA was able to mobilise such support in Sheffield, where we are based and have an extensive network of contacts ourselves, we were not able to do this so well at a distance in Whitby
- An increased focus on slightly more advanced IT skills, so that it would be safe to assume that a higher proportion of the target constituency would be confident in participating in online discussions

Organisationally we are not aware of any direct links between Whitby BDA and Ufi, so these would probably need to be brokered by what is currently North Yorkshire TEC (being the organisation with a foot both in the Ufi and BDA camps).

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## 5 Discussion and Comparison of Results with Exemplars

### 5.1 Review of Comparative Success of Pilot Clusters

There are several common characteristics among the three pilot clusters, and also some ways in which they differ. Drawing out these points can help generate a framework for implementing learning clusters in different contexts.

The common features shared by the pilots were:

- **Short timescales:** building effective learning clusters is not something you can do in weeks – unless perhaps all the elements are there to hit the ground running – and we feel that all the clusters had more potential than they were able to realise in the limited timescale of this research project. This problem was particularly acute with the Whitby IT Club cluster, which was not launched until two months before our research was due to complete.
- **Online component provided a focus:** although there were issues with some cluster members feeling confident with online group discussions, as might have been expected, the sponsors and gatekeepers we worked with found that this component gave some ‘tangibility’ to the cluster concept. In particular, it marked out the membership of the cluster very clearly: if you are a member, you get all the messages on the Email Discussion List; if you aren’t, you don’t. This is a more stark distinction than often occurs with cluster and members that work mainly face-to-face.
- **Need for facilitation and animation:** all the clusters needed an active input from a facilitator to get discussion going in the early stages, and there was almost immediate impact if the facilitator was away or withdrew at the end of the pilot period. In the case of the Whitby cluster, however, it was clear that the facilitator role was necessary, but not sufficient on its own.

The key factors which separated the pilots were:

- **Ease or difficulty of recruiting members:** in the case of the CITINET Centres cluster, the membership was pre-defined by the CITINET organisation itself, so ‘recruitment’ was straightforward and no promotion was needed. The other clusters were ‘open’ to anyone to join, and were promoted to specific target constituencies. This proved to be difficult when we had few additional organisational resources that we could leverage – especially in the case of the Whitby cluster
- **Links with local partners and advocates:** with both the CITINET/Sheffield-based clusters DJA had the advantage as facilitators of already having good personal networking links with a lot of the key players who could help us bring the clusters to life. Our relative success in our promotion efforts was undoubtedly due to the fact that we were that much more ‘removed’ (organisationally rather than geographically) from the Whitby BDA and North Yorkshire TEC network. In both this case and the Webwise cluster, our first promotional efforts fell fairly flat. But in the latter case, we were able to draw on ‘favours’ from a wider network of contacts to recover the situation.
- **Baseline awareness and experience of online discussions:** in the CITINET Centres cluster, there were a number of members, both in CITINET management and among learning centre staff, who already had experience of participating in and running Email Discussion Lists. Thus, they were able to engage with this new initiative straight away, and were able to ‘carry’ the discussion for a while in the early stages. In the Webwise cluster, there were a number of the mentors with similar experience, but the newbies, almost by definition, were much more cautious. In the Whitby, our sense was that our attempts to promote the online cluster at the IT Club launch met with a fairly blank reception in terms of familiarity with the concept of Email Discussion Lists and how they might help. Inevitably this had a major impact on the viability of initiating a cluster in these circumstances.
- **Involvement of members with clear stake in success of cluster:** in the case of CITINET Centres cluster, the CITINET management have a clear interest in promoting use of the Email Discussion List. It saves them time and money, but more significantly keeps CITINET ideas in front of the members’ awareness. This interest provides the cluster with a natural source of energy. The Webwise cluster was, by comparison, an initiative that only really made sense in the context of our research project – while CITINET were helpful in enabling us to promote it, no-one had any

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stake in its future, except possibly DJA! The context in Whitby was again different, in that the IT Club was only launched at the same time as our online cluster. The sponsors of the IT Club would naturally focus their attention first on getting the off-line activities going, seeing our cluster as an optional added extra.

To provide further comparison points to inform our framework, it is useful to sketch out details of two other online clusters that differ in key regards from the pilots developed in this project:

- Both have been established for years rather than months – in the case of the Network Users' Forum, for nearly five years
- The LeTTOL Completers cluster is linked to the LeTTOL (Learning To Teach On-Line course), and works as a way for course 'alumni' to keep in touch. Due to the way the selection of the pilots evolved, we were unfortunately not able to run a pilot that linked directly to a course or programme of learning.

DJ Associates has been a member of both these clusters since their inception (1995 for the Network Users' Forum; 1998 for LeTTOL Completers).

## **5.2 Exemplar Clusters**

### **5.2.1 Network Users' Forum**

The Network Users' Forum was established in 1994/95 as public-private partnership, as a response to the perceived role of ICT in economic and social regeneration. The initial proposals were developed under a working group of the Sheffield City Liaison Group (now Sheffield First - see <http://www.sheffieldfirst.com>). It originally supported a programme of meetings and seminars, and a printed newsletter, as well as online publishing and discussion (its first Email Discussion List was operational from June 1995).

In many ways, the remit of NUF mirrors that of the Whitby BDA's IT Club. However, NUF has a narrower focus covering just online technologies rather than all of IT, at the same time as serving a wider constituency (education and community organisations as well as business, while the Whitby IT club is aimed just at the latter).

The Forum had quite a high profile launch (over 200 people with talks from a local MP and leader of the city council) in Summer 1995, but was unable to capitalise on this immediately since it had no funding other than the volunteer efforts of its founders for the first 18 months after the launch. The Forum then received European development funding for the next 18 months (January 1997 to June 1998) during which time it developed over ten online forums focused at different user communities (e.g. Sheffield Business Club, ICT sector providers, the voluntary/community/'third' sector). Many of these are still in action two years after the funding came to an end.

However, the one central online NUF forum - known as Snuffle - has continued to be by far the most successful in terms of attracting new members and increasing volume of exchanges. It now has 145 members, who regularly exchange in excess of 200 messages a month with each other (both measures have grown by over 50% in the last year). The topics covered include:

- Requests for technical advice and help (e.g. in relation to PC maintenance, web design and authoring) - this is by far the most common kind of message and appears to offer most value to the members, who are encouraged by the regularity with which other members will volunteer free advice and tips
- Discussions of good practice in designing web and other online services, including critical reviews of a range of sites
- Informal jokes and banter, which often appears quite cliquy (over time many of the members have got to know each other face-to-face, and introduced their friends and colleagues to the Forum) and can occasionally drift into personal insults.

Among the many topics covered that are of general use for professional updating for people working online, there are some that relate particularly to more formal learning, such as a recent discussion on the value of Microsoft Certified Engineer courses and accreditation<sup>11</sup>.

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<sup>11</sup> See <http://www.syspace.co.uk/nuf/lists/snuf-1/2000.m3/0251.html> for first message in this discussion, and click 'Next in Thread' for the follow-up replies.

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The success of the Forum's Snuffle cluster took a long time to take hold, however. It was not until May 1997 (nearly two years after the launch of this cluster) that more than a small handful of members began actively contributing to the discussions. Even then, and to this day, there continue to be a small number of energetic stalwarts who liven up the exchanges with informed and openly opinionated messages. There is no doubt that these people subtly set the tone for the cluster, in terms of a culture of helpfulness combined with informality and irreverence. Engendering this culture has resulted in a there being a steadily growing number of more occasional contributors who enter into the spirit established by the informal 'champions' of the cluster.

Since the Forum's development funding ran out, its constitution has been changed and formalised, so that all participants are now members with a constitutional say in how the Forum is run. There is a steering committee of volunteers, all but one of whom are from the private sector, and all the technical services and maintenance are provided free of charge by private sector companies. Membership of the Forum is free principally to avoid the administrative overhead of handling and chasing membership subscriptions. While the Forum has had some promotional postcards printed, the most common sources of referral for new members are word of mouth and web search.

Many of the members are professionally involved in designing online services – most being based around South Yorkshire and North Derbyshire, though a handful are from as far afield as Utah, New York and Tokyo.

The Forum and its Snuffle cluster are not formally linked to any learning outcomes, except that the mission of the Forum does include the learning-related aspiration to "help [people] explore how they can benefit from using network applications and online services." It is clear, nevertheless, that the main value the members perceive from Snuffle is from the way it acts as a resource for continuous professional development, albeit one that is frequently leavened with wit and attitude that may or may not relate directly to the subject matter.

It is important to note that a number of the people who played key roles in developing and promoting the clusters in this project were also members of the Forum (this includes DJA staff as well as those of other agencies). This had the advantage that they were already to a large degree convinced of the value that could be added by online communication. There is also the possibility that they imported certain expectations of 'how things are done' in this medium – see for example the references to the Forum in the excerpts provided in Section 4.3.

## 5.2.2 LeTTOL Completers

The Learning To Teach On-Line (LeTTOL) course was developed by the South Yorkshire FE Colleges consortium in 1996/7. It has been continuously revised since then: full details can be found at <http://www.sheffcol.ac.uk/lettol/> In 1998, Julia Duggleby, one of the leaders of the course decided - in response to requests – to set up an online forum for people who had completed the course. The course encourages some quite intense collaboration and communication among its online learners, using both email and web conferencing. Over the three months that it usually runs for, many learners found that they built up useful relationships with each other, and felt that they would value the opportunity to maintain these.

Thus, since late 1998, everyone who has completed LeTTOL has been given the option to join the 'Completers' Email Discussion List. Of the four hundred or so completers, fifty nine are members of this cluster. Over half of LeTTOL learners are from UK Further Education colleges, and many of these are from South Yorkshire colleges where the course naturally has a high profile. However, significant proportions also come from Higher Education and private sector training, and members of the cluster come from as far afield as Canada and Australia.

After the list was first established, Julia Duggleby invested quite a lot of effort in facilitating the discussion herself. This mostly took the form of introducing chatty 'social' questions, rather than exclusively 'professional' topics. This was important since many of the cluster members had 'graduated' at different times, and would only know those alumni who were in the same cohort (online 'classroom') as them. This early facilitation set the early tone for some rambling but nevertheless amusing exchanges, that covered all points from debates of '60s music to reminiscences of various counterculture movements! The issue of online tutoring was never far behind, however.

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At the peak of activity, more than ten messages a day were exchanged. This has now declined, partly no doubt because Julia is no longer facilitating so actively, but correspondingly the proportion of messages directly and exclusively related to online tutoring has risen. The monthly volume of messages now varies between ten and forty, depending on whether someone introduces a particularly engaging question or debate into the cluster. In common with our experience of the Webwise cluster, it appears that when this Email Discussion List is fairly ‘quiet’ members may almost forget that it is there, so they are less likely to post even relevant messages to it. Then, when someone does introduce an engaging topic, everyone’s awareness of the list rises again, and further topics blossom in a positive feedback loop.

On the face of it, the LeTTOL Completers cluster seems to run, like the Network Users’ Forum, on goodwill alone. None of the completers pay anything to be a member, and it might seem that the ‘owners’ of LeTTOL have little to gain from it, given that all the members have already used their main product! However, a review of the discussion topics and content reveals that there are potential benefits from a number of perspectives:

- All members get a professional updating service from the Email Discussion List, because if one member finds out about a relevant development, they pass it on to everyone else
- They can also set off debates related to their professional practice, such as a recent series of exchanges about techniques for marking and annotating electronic submissions from learners
- The LeTTOL providers are able to try out ideas for further course development on an informed group of committed customers (e.g. developing an extended version of the course at a higher level of accreditation)
- They can also promote the ‘book of the course’ (Duggleby, 2000)!
- Ufi recently asked if details of some of their job vacancies could be posted to LeTTOL completers

The LeTTOL Completers cluster differs from the other clusters we have covered in this report in that it is explicitly tied to a particular learning programme from a particular provider. Thus, to the degree that it is not clustered around an *independent* body of learner interests, one could argue that it is more provider-centred and less learner-centred. However, there is clearly a role for more than one approach to learning clusters in the emerging marketplaces, and there is no question that the more progressive providers of e-learning are already making significant investments to gain ‘first mover advantage’ in forming learning clusters related to their products and services. Ufi seems quite likely to follow suit as soon as it has the capability to do so.

### **5.3 Review of Research Questions**

We are now in a position to review the questions that we set ourselves at the start of the project.

#### **5.3.1 What works and what doesn’t work in building and facilitating effective learning clusters?**

Some of the key ingredients are:

- A sponsor and champion who has a clear vested interest in the long-term success of the cluster
- One or more people with clear responsibility for facilitating the social aspects of group exchanges (see comments on member support and group support in Section 4.4) – especially in the early stages of development
- Ability to identify and recruit advocates with networks of contacts in the target constituency who will promote the cluster by word of mouth
- At least a moderate number of members who have experience of similar clusters in related areas – including the techniques and culture of communication – so that they can help get the ball rolling
- A clear understanding of what will motivate each of the sub-groups in a cluster to participate actively, plus rewards and recognition to reinforce this participation
- A commitment to developing the cluster in the long term, looking well beyond six months

Some of the approaches that *don’t* work include:

- Promoting online clusters by some traditional methods such as flyers and posters
- Targeting an online cluster at a constituency of learners where fewer than 20% have experience of online discussions (20% may sound quite low, but if 20% of the membership can take an active role in the cluster, this can still make for lively discussions, and will gradually draw in the others)

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- Launching a cluster for a completely ‘greenfield’ constituency (i.e. one whose members have no previous history of association with each other) – unless you are prepared to wait years for the cluster to cohere with its own identity (as in the example of the Network Users’ Forum)

### 5.3.2 Who are the ‘influential peers’ for different individuals and businesses?

The answer to this has to be ‘it depends’. The patterns of influence are not the same across the range of formal and informal associations and communities that could be candidates for developing learning clusters.

The pilot clusters that we worked with in this project did not have time to mature fully through all the stages of group development (forming, storming, norming, performing – as described in Section 4.3), and consequently it is difficult to discern any emerging ‘leaders of opinion’ among the groups. In the case of the CITINET Centres cluster, the CITINET manager clearly has some influence by dint of his position, but it is likely that more subtle influences will develop among the members. There are early signs that one or more members may seek to ‘stir up’ the cluster by questioning some aspects of CITINET management. While such episodes are inevitably uncomfortable for those involved, they can be seen as a natural part of the ‘storming’ cycle of group development. There is an extensive literature that the working out of such tensions is central to the building of community identity, and the identification of key influencers that goes along with this (e.g. Rheingold, 1994).

Where clusters are built on top of existing associations – as we are broadly recommending from our research – there should already be clues to be found about who the influential peers for members will be. While online communication can subtly alter group dynamics, it is important to stress that online learning clusters do *not* operate in some cut-off cyberspace world where wholly different rules apply. In effective learning communities, the online and offline activities of members should fit seamlessly together: it should be possible to influence offline developments via online discussion, and vice-versa.

### 5.3.3 To what degree do associations already exist to support these clusters of peers?

There are a large number of associations and networks for different constituencies – employers, employees, private individuals, and providers of learning and learning-related services – throughout the region. They vary in focus from local communities to metropolitan and sub-regional, and ultimately to regional or national scale.

Through the pilot clusters, we worked with a couple of such associations: CITINET and the Whitby IT Club. Both are relatively ‘young’, but the IT Club particularly so, since it had yet to be launched at the time we put together our plans for the cluster concerned. We found that in this latter case the association did not have the infrastructure and momentum to ‘carry’ the additional layer of an online cluster. Meanwhile CITINET was able to provide us with enough resources, information and leverage to get two clusters at least off the ground.

Based on this and experiences from the exemplar clusters above and elsewhere, the ‘qualifications’ for an association to support a learning cluster would include:

- Strong links into a constituency with a common purpose, and some degree of respect for and loyalty to fellow members of the constituency (as well as to any central administrative function of the cluster)
- Ideally an established culture of member-to-member communications (although the Network Users’ Forum shows that it is possible to build a cluster from scratch with patience and persistence)
- A focus on and commitment to promoting informal learning (awareness raising, professional updating, experience transfer) and/or informal learning among its members
- Links to other associations and organisations to make it possible to leverage their resources and/or members
- An executive or administrative staff with
  - Enthusiasm for and experience of online discussions
  - A clear pay-back from successful growth of the cluster (in terms of numbers of members and/or exchanges)

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Clearly a Ufi/**learndirect** hub ought to be able to meet all of these qualifications, and could therefore be a prime candidate for fostering the development of learning clusters – as CITINET has started to do through the pilots in this project.

It would be unwise to concentrate on Ufi/**learndirect** hubs to the exclusion of other associations, however. For example, the focus groups we carried out with employees for our report last year (DJ Associates, 1999) suggested that Trades Unions could in many instances provide a good seeding ground for learning clusters. This is especially the case in circumstances where union staff hold more of the confidence of employees than the management of their employers may do. There are a wide range of comparable associations in ‘civil society’ that inspire considerable loyalty from their members, and may be delighted to participate in the development of learning clusters for these members – provided they have the qualifications listed above.

One of our other research questions addressed the degree to which people in clusters already participate in learning (individually or together). Clearly there are many other purposes than learning for which people may affiliate together in clusters. In the case of neither CITINET nor the Whitby IT Club did the members of the cluster come together specifically to undertake formal learning. Nevertheless, one of the fundamental premises of any such association is that by bringing people together you create an environment where people learn from transfer of experience between each other. This is the added value and the rationale for the association in the first place.

#### 5.3.4 What are the possible ways to ‘focus’ a learning cluster?

At the start of this project we proposed various options for focusing learning clusters, including developing them around a learning centre, at sector-focused events, or in an online forum. Our current project has only really addressed the last of these in any detail, although the Whitby IT Club launch in which we took part itself constituted a sector-focused event.

One of the key things our experience has shown is that building a learning cluster has to be a long-term commitment. Therefore – whether the activities of the cluster and its members are focused around a particular venue, such as a learning centre, a series of face-to-face events, a particular course or an online discussion facility – the organisers need to be confident that they will be able to sustain the momentum of the activities over a period of months, if not years.

There is no reason in principle, from our research, why clusters could not be focused around any or all of these sets of activities. The work of the Learning City Network on learning communities suggests that clusters that work entirely off-line can be sustainable and effective (see Section 3.2). The advantages of adding the online dimension, as we did in this project, are several:

- Online activities can complement face-to-face meetings: even if the online component is secondary to begin with (as in the case of the Whitby IT Club), it can be allowed to grow over time, as members gradually become more confident with it
- Online communication is a very cost-effective way of keeping members of a cluster ‘in the loop’ between offline activities (which have more overhead costs in organising and preparing for). To receive occasional email or web conference messages via a cluster keeps the existence of the cluster in the front of the members’ awareness.
- Online support for learners is very complementary to the initiatives that Ufi are going to be offering, and very much in synch with the investment they will be put into learner support arrangements. For those hubs and learning centres in Y&H that operate the **learndirect** service, the provision of these arrangements will be a requirement. For all learning providers working in a ‘marketplace’ with e-learning on the rise, there will be a double incentive for their learners to get familiar and confident with this form of support.

#### 5.3.5 What could be the role of **learndirect** tutors and tutor groups in building clusters and ‘community feeling’?

It is clear from our pilot learning clusters that it is essential to have active facilitators to animate the online dimension of a cluster. Trained tutors for online courses will be the best-placed people to fill this role. The desk research reported in Section 3.4 shows that there is an extensive body of guidance and resources devoted to the specific competences of being an online tutor and facilitating learning discussions.

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From our understanding, as reported in Section 2.5, Ufi's ambitions overlap significantly but not completely with the model of learning clusters presented in this report. The areas of overlap are:

- Focus on online media as main channel of learner support
- Commitment to 'active tutoring'
- Recognition of the role of peer support in learning as a social activity

The differences are:

- **learndirect** tutor support is only available to learners while they are doing a **learndirect** course (at least initially)
- **learndirect** tutor groups may not function in the same way as clusters because members may not all join at the same time, or actually be undertaking the learning activities in synch with each other

From the community-building perspective, these differences are significant. We have stated that it can take months for the dynamics of an online group to emerge and settle to the point where all members have a sense of a coherent collective identity. Many, if not most, learners may complete their **learndirect** courses in less than a few months.

We believe it is possible to accelerate the process of online group development, but only if all the members are led together through a fairly intensive timetable of collective activities and discussion. The LeTTOL online course takes this approach with its learners. But the possibilities of taking this approach with **learndirect** tutor groups appear to be undermined by Ufi's commitment to allow learners to start their course whenever they see fit, and to progress entirely at their own pace.

There is a clear tension here between Ufi's commitment to offer learners *individual* choice and the desirability of getting learners to commit to *collective* disciplines to enrich the social interaction in the learning process (in other words: freedom versus responsibility). It might be possible to reconcile the roll-on/roll-off enrolment approach with the benefits of 'streaming' learners into cohorts starting at the same time *if* there was sufficient throughput volume of learners to have new tutor groups starting every few days. However, it is very unlikely that **learndirect** will achieve sufficient volumes on any but its most popular courses, unless hubs are able to coordinate and share their tutor groups to benefit from economies of scale.

It is very difficult to anticipate exactly how this apparent tension between **learndirect** goals will play out in practice, because there are no precedents for learning initiatives on this scale in similar contexts. What we can say with a fair degree of certainty is that there is unlikely to be a fixed blueprint for this aspect of **learndirect** operation for some time to come, as practice will have to accommodate the lessons of practical experience. Hubs in the region will be well advised to pilot and evaluate a reasonably wide range of alternative models, within the overall framework provided by Ufi.

### 5.3.6 What are the staff development needs for tutors and where are they going to come from?

The staff development needs of tutors were alluded to in Sections 2.5 (from Ufi perspective) and 3.4 (specifically for online tutoring). We have also elaborated on these competencies through the consideration of the pilot clusters, showing the needs for

- planning a programme of online activities
- including 'social' activities that engage members in discussion and finding out about each other
- facilitating online exchanges to draw out learning points and draw other members into discussions

Meanwhile the question of where these tutors and skills are going to come from is one we have not been able to address very directly through the research in this project, beyond noting the range of resources and guidance for tutors.

As a region, Yorkshire and Humberside is quite well served by training for online tutors. The Learning to Teach On-Line programme, provided by the South Yorkshire FE Colleges, has already been mentioned several times – including being referenced by Ufi in their Learning Support circular. It has a growing national reputation, and a significant proportion of the 400 people who have gained accreditation through this course are based in the region. Other programmes for online tutors are in place in West Yorkshire and, through Darlington College and others, in North Yorkshire. Ufi itself has endorsed an online course in online tutoring skills, developed by the Institute of IT Training (IITT), and presumably this will be made available to all **learndirect** hubs.

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### 5.3.7 How should learning clusters fit within the management practices of **learndirect** hubs and centres?

The approach this report recommends for developing learning clusters has many synergies with the proposed **learndirect** operations.

Earlier in this section we documented the ingredients for an effective learning cluster (Section 5.3.1) and the qualifications for any association that might support learning clusters (Section 5.3.3). We commented that a **learndirect** hub ought to be able to meet all the latter qualifications. Moreover, the revenue generated from **learndirect** operations should support some of the ingredients for effective learning clusters, particularly:

- The stake the hub has in attracting learners to **learndirect** courses should provide the organisational impetus for a champion with a vested interest in growing clusters
- The human resource capability – in the shape of qualified online tutors – to play the role of facilitating social aspects of group exchanges in the early part of the development of clusters

However, while Ufi/**learndirect** may support the ‘capacity building’ of local hubs to set up and operate learning clusters of the kind outlined in this report, it seems unlikely that it will directly support the running costs of such clusters. This is because the clusters recommended here may not all be tied to **learndirect** courses (although in principle, some of them possibly could).

Individual hubs will therefore have to review the business model for developing and supporting learning clusters in their patch. On the cost side, factors to include will be:

- Costs of tutor time in facilitating the clusters – we understand that the Ufi business model makes it very tight to pay for sufficient tutor support even for **learndirect** courses, let alone any ancillary activities
- Costs of venues and facilities for cluster meetings, where these cannot be combined with existing **learndirect centre** operations
- Costs of technical infrastructure and support for online activities – Ufi will have no spare capacity in its WebBoard conferencing available for hub use before Autumn 2000, and it may continue to be restricted after that; we have already commented that the technology infrastructure costs are negligible (and well within the capacity of most colleges and all universities in the region), but the needs for back-up support must not be ignored and are not always trivial
- Logistical and marketing overheads in recruiting advocates for the cluster and cross-promoting it in other existing clusters or associations

On the benefit side, factors that should come into the reckoning include:

- Greater throughput of learners both on **learndirect** courses and other provision from hub partners – particularly by attracting more repeat business, bearing in mind that repeat business from learners reflects well on the twin criteria of promoting lifelong learning and increasing revenue margins from provision (because repeat customers are generally more profitable than first-time customers)
- Building capacity and confidence among learners for taking up e-learning opportunities
- Links and synergy with parallel initiatives, including RIS sectors, CoMPRIIS developments, Individual Learning Accounts
- Potential savings (in the long term) on advice and guidance services, where it may be uneconomic to provide one-to-one advice to all learners and some learners may be able to get adequate advice using the word-of-mouth recommendations they get from learning clusters (in the same way that individual investors get investment advice from peers in the Motley Fool online community we referred to earlier, see Footnote 2 in Section 2.3)

There is clearly scope for regional collaboration between hubs to help cut costs (e.g. by sharing technology infrastructure and support) and increase benefits (e.g. by cross-promoting a wider range of activities through the clusters).

One final factor that may come into play in the next year or so is the **learndirect** membership schemes. As we understand it, this will include both individual and business member options. However, neither of these have been defined in detail at this stage, and they will not be implemented until Spring 2001 at the earliest. (The systems launched in May 2000 do use the term ‘member’, but this is simply a free option that visitors to the **learndirect** web site can choose to enable them get a **learndirect** Internet service connection and email address, in return for Ufi collecting data about them for marketing purposes.)

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The idea of a learner becoming a **learndirect** member is that this will enable them to remain 'part' of the **learndirect** service even between the episodes when they are doing courses. As such, it is a more long-term, even lifelong, relationship, and one that is much more in keeping with the ethos of the learning cluster membership idea we are recommending in this report. It may be at this stage that Ufi is able to provide more support to hubs in providing online services – including discussion forums – to members. This could alter the business model for developing learning clusters by reducing the costs and/or enhancing the benefits.

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## 6 Recommendations for Next Steps

Going back to our original report (DJ Associates, 1999), we wrote:

The development of learning clusters is an organic, social process that cannot be easily 'engineered' along an entirely predictable route. Some clusters can be built on existing well-founded networks and communities. Others may need to be 'grown' more or less from scratch, and of these, some will quickly emerge with a strong identity while others may wither and not get off the ground.

We recommend that, to optimise the conditions for growing learning clusters, the 'entry costs' for joining are kept low. However, it may help to reinforce the social network aspect of clusters if each person is mandated to make some commitment to the 'mutual' aspect of the cluster on joining. This will usually be an in-kind contribution – e.g. mentoring of others, giving a presentation based on their own experience, or providing recommendations for relevant learning resources.

This project has been an exercise in rolling up our sleeves and engaging with the organic and social processes we described. It has been every bit as unpredictable as we expected, but through its execution, we believe we have demonstrated some valuable lessons about the practicalities of learning clusters and how to go about developing them.

We recommended a number of related actions last year:

### **Tutor Support**

- Organise training for Learning Centre staff in managing flexible and technology-based training provision, and in online tutoring
- Build a 'pool' of trained online tutors who can support online delivery around the region
- Support exchanges of best practice between online tutors through a network (e.g. techniques for moderating online discussion forums)

### **Learning Clusters**

- Identify potential learning clusters at local, sub-regional and regional levels
- Pilot and review cluster implementation at each of these levels and using a range of learning delivery methods/learning routes
- Explore potential for links and ties between learning clusters and existing/new membership schemes

We believe that these recommendations remain valid, and, if implemented, the targets we proposed in our previous report still seem desirable, realistic and achievable:

### **By 2001**

- 15 pilots of membership-based Learning Clusters established:
- At least 3 of these to be defined in terms of sectors/interests rather than geography
- At least 3 of these to include ICT-based tutor support
- At least 3 of these to be focused on RIS/Ufi sectors
- At least 3 of these to include trade union involvement and support

### **By 2002**

- Membership of regionally-based Learning Clusters to reach 250 businesses, 10,000 individuals

The only amendment we might make to these targets is that, in the light of Ufi's commitment to provide most learner support online, it would be wise to increase the proportion of pilot learning clusters that include ICT-based tutor support from 20% to at least 50%.

What this means in relation to today's circumstances, based on the findings of this project, is that we can extend our recommendations as follows:

- The training of online tutors with skills in facilitating and animating online discussions is now an urgent priority, which the regional learning infrastructure must address. **Learndirect** hubs will be required to source such tutors from May 2000, and in greater volumes from September 2000. As

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- well as supporting **learnirect** operations directly, tutors with these skills will be essential for building broader-based learning clusters in their local areas.
- Managers of **learnirect** hub consortia should develop Business Models for learning clusters along the lines described in Section 5.3.7
  - Hubs and other local lifelong learning partnerships should review the associations that could act as fertile seeding grounds for online communities, based on the ‘qualifications’ provided in this report (Section 5.3.3)
  - At a regional level, TECs and their partners should establish a forum for hub technical managers to coordinate the technical infrastructure for supporting learning clusters and involve Ufi in these discussions once needs start to emerge
  - Local hubs should also consult Ufi about their plans for individual and business membership, and explore how membership of local/regional learning clusters could integrate with this.

There are now an overwhelming range of drivers for change in the way lifelong learning is delivered, and how it engages with learners. These include major policy, market and structural shifts as well as technological developments and opportunities. Ufi/**learnirect** is only one player in promoting new environments for learning, but its implementation across Yorkshire and Humberside provides a very tangible opportunity for the region to flex its muscles, experiment with new ways of working, and build on the strengths it has established. While the online medium is not the be-all-and-end-all of successful change, its continuing growth is plainly unstoppable and it is important that regional players harness its potential. It would be unwise to allow national and international organisations to make all the running in this area.

We hope that the pointers to successful development of learning clusters in this report can play a part in managing and accelerating the changes in lifelong learning in this region.

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## 8 Rationale for Learning Clusters

The following text is excerpted from Section 5.3 of our original report (DJ Associates, 1999).

On the basis of the results quoted above and in the Appendices, there appears to be considerable scope for organising learning activities around the communities of interest which they serve (rather than around the provider institutions, as is traditional). This also chimes with one of UfI's Learning Principles, which include the promise 'to put you in touch with other people studying the same topics' (UfI Ltd, 1999).

If this could be achieved it would open up more opportunities for interaction between people with common learning interests ('communities of learning'). This in itself would be beneficial because peer communication aids learning and is attractive to learners. But perhaps even more significantly it would foster an environment that encourages 'word-of-mouth' recommendations, which have been shown to be very influential in getting people to take up further learning opportunities.

As used in this report, we define a learning cluster as a network of people with the following characteristics:

- The members of the cluster feel some sense of common identity and common bond with each other
- 'Membership' may be through a formal or informal association
- People in the cluster respect each others evaluations and see each other as peers and role models
- They are thus favourably disposed to learning with and from each other
- People in the cluster have regular contact with each other, usually covering more than one type of transaction (i.e. not just one-way trading or power relationships)
- Clusters may therefore emerge in whatever networks people associate with (e.g. local communities, business sectors and trade associations, social clubs, hobbies)

On the basis of the findings reported above, it is possible to envisage the following candidates for learning clusters:

- People working in the sectors of the labour market where temporary contracts are most common, and looking to enhance their employability
- Younger people who are starting out on their careers and are keen to try ICT-supported learning (and possibly share some leisure interest)
- Women looking to enhance their qualifications and advance their careers while juggling family commitments
- Specific business sectors who have common reasons for workforce development, and use similar learning methods

In the employee focus groups we held at Trade Union Study Centres in South and West Yorkshire and in Humberside, we also found considerable support for the established model whereby union officials can act as 'learning advocates' and create a climate for learning among the workforce (sometimes in circumstances where management-led initiatives might be viewed with suspicion).

Initially these communities may need to be locally focused to allow them opportunities for interaction. Interactions between people working flexibly in Learning Centres will generate 'word-of-mouth' referrals. Ultimately it is possible to imagine that communities of learning may cluster around web sites that provide links to learning materials in their interest areas. Online conferencing would be used to swap notes among learners and pass on the 'word-of-mouth' about good (and bad) courses – and also to arrange 'offline' meetings and social events.

### ICT Support for Communities of Learning

One of the key advantages of ICT-supported learning methods in the long run will be the *flexibility they offer in defining and building communities of learning*.

Learners of all persuasions will be increasingly able to associate with people who share their values, rather than just people who share their geography or employer. People with all ranges of learning

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demands and interests should be encouraged to find communities that reinforce their own preferred learning approaches. Each learning community has its own values, norms and perceived rewards, e.g.:

- Communities of managers and professionals who confer nationally or internationally and value learning for the rewards of professional development as well as career advancement
- Local communities in deprived areas where the link between learning and employment has been threatened and needs to be re-validated
- Youth communities where one of the main incentives for learning may be the potential for new social contacts and collaborative activities with peers
- Hobby communities where learning is valued for itself, or as feeding a personal fascination

The use of ICT to support learners also opens up possibilities for increasing specialisation among the region's learning providers, wherein providers may focus on their areas of strengths, and the 'best of breed' learning materials and support can be delivered at different sites across the region.

# Learning to Be An Online Tutor

BY JULIA DUGGLEBY  
AND DAVID JENNINGS

Five years ago only a few people would have even heard of the Internet, let alone known what it was or made regular use of it. Yet it is now transforming the way that human beings find things out, shop, work, play and communication with one another. Included in that transformation is the way in which we can teach and learn.

The tips in this article are based on our experience of two web-based learning delivery programs: one aimed at tutors themselves, and the other at adult learners and the general public. Learning to Teach On-Line ([www.sheffcol.ac.uk/lettol](http://www.sheffcol.ac.uk/lettol)) aimed initially to build up the online skills of tutors in the UK higher education system, but has been adopted by trainers from a much wider variety of contexts. Living IT ([www.living-it.org.uk](http://www.living-it.org.uk)) helps its learners build their Internet fluency in the key competencies of Internet searching, web authoring and effective online teamwork.

## Communication Skills

These are important in an on-line tutor as they are in a face-to-face tutor, perhaps more so.

- You need to be able to write well.
- You must be able to express yourself unambiguously.
- You must be tactful, and you must be good humored.
- You must be clear about what you expect from students and when. Let them know how they are doing. Encourage and congratulate good work, and be honest if work isn't meeting standards. Tell them what they have done wrong or missed out, and tell what the need to lift their work. Be kind when doing this.

## Contracting with the Learners

A lot of people are attracted to online learning by its flexibility and convenience, but these same factors require discipline and persistence from learners to ensure effective learning and completion.

- *Provide some "self-assessment" process* at the start to ensure that learners have the time, technology and support available to work through the course.
- *Consider providing a "contract" for learners* that tells them what they can expect from you as a tutor, and in return what you will be expecting from them.
- *Don't let your students flounder or fall behind.* If they fall behind be flexible about renegotiating deadlines, but being endlessly flexible will be demotivating to your students.

## Managing the Learning

- *Know your stuff.* Incorporate your knowledge into the Web-based course materials so your students have access to it when they are ready. Your job is to guide them through, to clarify issues, to sharpen their thinking.
- *Value the skills, knowledge and experience of your students.* Set up systems that allow your students to share their learning experience with others—groups that work together throughout the course or on particular tasks.
- *Encourage social interactions.* These will be the learning experience more enjoyable and, therefore, more motivating. You will find also that if students feel they are part of a course group they will be keener to work well and meet deadlines.

## Organizational Skills

- *Organize your email system into folders*—perhaps a folder for each student, perhaps one for each assignment. Your email structure should reflect the structure of your course.
- *Store all emails you receive from your students*, and keep a copy of the emails you send to them.
- *Try to see your students as individuals, and treat them as such.* Because you never see your students, it is harder to remember information about them; so record what you need to know—alternative email addresses, holiday dates, technical problems they may be having that you need to follow up.
- *Organize your time.* Online training cannot be timetabled in the same way that face-to-face training can. You need to be available throughout the week.
- *Reply quickly to emails you receive.* Aim for a response within 24 hours. Be quicker than this if your student needs an answer before she or he can proceed. If students are waiting days or weeks for a reply to an email, then they are not receiving the full benefits of an Internet course.

## Ensure your organizational support

- Make sure that you are provided with fast and reliable equipment.
- Make sure that you have speedy and efficient technical support.
- You will need to have a place where you can work without interruptions from others or the telephone.
- You may choose to work from home. Have a workspace that has a door you can close.

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*Try to see your students  
as individuals,  
and treat them as such.*

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### Technical skills

We have put these last because, though important, an online tutor needs to be a good teacher before becoming a technician.

- *You need to know how to use the Internet well.* You will need to be able to find your way around the Web, and you need to know how to use email effectively.
- *Being a fast typist will certainly be helpful.* If you are not, get your speed up with a typing tutor or invest some time learning how to use voice recognition software.
- *Leave the authoring of your course to the experts,* but find out about the principles so that you can discuss what you want with some authority. Make sure you know something about usability.

Some models of online learning place more emphasis on “self-contained” courseware, with an emphasis on efficiencies and economies of scale. Our approach in our two programs keeps the human element of tutor-learner relationships at its heart. That is often a key motivational and discipline factor, and we believe it is central to successfully achieving learning outcomes.

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## Conner

continued from page 7

to learn about everything from which car to buy to which groceries to select to where to find the next CFO of their company. All of those are learning opportunities.

We need to realize that the gates are open, that learners have many opportunities and ways to learn, that we need to be thinking about how to craft material in a way that delivers it in a high impact, fun, interesting, compelling way.

People are rarely learning because “Well, I need to learn this.” People are learning something as part of the process of accomplishing something greater.

BH: *You are saying people are drawn to content that is short, fast, interesting.*

MC: And compelling. The competition is no longer what classes are available by the training department. The competition is the world.

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## Featured Event:

### Designing a Virtual Corporate University

In an age of lifelong learning, the workplace will emerge as the natural venue for continuous instruction and training.

Corporate UniversityXchange will host *Designing A Virtual Corporate University*, a three day symposium and exposition, Nov. 8-10, at the Doral Golf Resort & Spa in Miami FL. Corporate UniversityXchange President Jeanne Meister will deliver the welcome address, and Brandon Hall will be a featured speaker.

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