

Subject Matter Expert Interview with NANCY WHITE

INTERVIEWERS: Eunice Shankland, Sheila LeGeros

Nancy lives in Seattle, Washington, and the name of her company is Full Circle Associates. Interview conducted via Skype.

www.fullcirc.com

Give us a cook's tour, overview of your virtual experience?

I've been mainly working with international NGO's who need to do stuff together whether it be one-on-one or in a group. I help them to develop their practices and configuration of technology. By configuration I don't mean help them with code, but help them figure out which features to use and how.

I build my own visual literacy through offline graphical facilitation and then understand the impacts of that in the online space, because some of the real difficult barriers that we find in online work are that the tools are built for a group but experienced by an individual. And because we each have our own way of taking in information of processing of thinking those experiences online sometimes lead to an incredibly fractured experience by the group as a whole. So really thinking about multiple modalities to check-in with each other, and really thinking about when we need those experiences to be convergent rather than divergent. They're the same sort of facilitation stuff you do offline, except that you're doing it with a blindfold on.

You know when you say "expert" I think there is still so much unknown. I'm sure there's anybody who's really an expert.

How do you design with a group, or for a group a virtual process?

It depends on the process and the context. Pay attention to the size of the group. There's this continuum I've been using called, "We, Me and the Network".

With "me" being what do I need to be doing to manage my work, my learning, my relationships with others? It is what I am doing to help myself. It may absolutely accrue benefit to others, but the point is, what do I need to do to get through the day?

The "we" would be what are the interdependent tasks? Our work teams, our voluntary teams, where we're trying to accomplish X by a certain date, and I need you and you need me to do it. Interdependencies have different sets of processes and we may use tools differently when we're interdependent. Particularly our agreement around the way we use tools is very important when we're talking about the "we" thing.

Then there's the "network" piece. The network is loosely overlapping interests, not congruent interests. In the team, we're all interested in getting the task done. In the network, I may be interested in organic cow growing, and you may be interested in being De Bar Chocolate, and we do have an overlapping interest in chocolate, but it's not required to get our work done. But there are times when our connection can be very beneficial to our learning or doing whatever it is in the world.

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And this is the part of the interaction that has really changed over the last five years with the technologies that have been introduced. Which is how do you send out to the wider network to share what you've done, how do you solicit the content from the wider network, how do you ask questions, how do you learn together, how do you explore the boundaries. The network is where your innovation can happen, where dissemination can happen, where actually if you don't expand to a network level change doesn't happen. That's a gross generalization, but I think you get the point here of the continuum between me, we, and the network.

On top of that the point here is that how do all those things accrue back to the me? How much can I handle from the network without getting overloaded? How much can I handle from the we without getting overloaded?

So, when you start thinking about design, you start thinking about where do you land in that continuum of me, we and the network. That's one thing. For example, if you land on the we, there are issues such as "how many relationships can we manage?" The more deep we need to go with people, we need to break the large groups into small groups -- you see this in face-to-face collaboration. We can't manage the conversation at the scale of 250 people. We break it down into small bits, have those conversations and build it back up, and break it down and build it up.

The same thing goes for online things in thinking about people's connectivity. If you have a group of people who are all getting online everyday you can use an online tool without too much negotiation; but if you have some people who are logging on every hour, some once a day, some once a week they become out of sync very quickly if your process is designed to happen over a week.

So, number of people, and frequency of connectivity then determine time spans. Time cycles are typically much slower online than they are face-to-face. And then the question arises, "how much do you blend synchronous like we're doing now on Skype with asynchronous?"

So, what you're doing is laying over these different aspects of togetherness and separateness of time and space of the individual or the group, and that then starts informing your design.

We've been calling the technology "stewardship". What do you need to do to serve the group, the community? The more complex the group, the more complex that work gets. Now, if you have a group that clearly knows what it needs to accomplish, it's actually simple, because that group will ignore most of the technology barriers because they are so driven to achieve their goal.

If you have a group that has far less cohesion around what it wants to do, every little nitpick of the technology will start getting in the way. With little cohesion and little shared interest you want to go with the simplest possible solution that gives them different ways of accessing that information to meet their individual needs, because they're really operating more from the "me" side than the "we" side of the continuum.

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So, when I'm designing I gather the context and the purpose and assess it at the level of "what activities am I trying to support?" And then I go into design. This has been a long way of saying, context and what you're trying to do matter.

Where have you found success conveying visually for a group what's happening?

I'll give you a couple examples. We don't have a chat window open now, so we're all operating primarily at an auditory level. So, I can see your pictures in my Skype window, I see your smiling faces, I see you both have glasses. It's funny you're both wearing dark jackets and turtle neck shirts and I'm thinking that's kind of funny. But, that's a fleeting visual impact. If we were using chat we could be taking notes in the chat. If Sheila were talking, Eunice could ask another question in the chat.

For people who aren't so good at listening, adding the chat helps them focus into the conversation. Some of us listen better when we're doodling. Not everyone consumes the modalities the same way.

If something is important for everybody to do at the same time, we do that through process. "OK everybody, I want you to take your hands off the keyboard, close your eyes and listen to this one line." So it's something that focuses people very deliberately rather than expecting the technologies to focus people.

But in the meantime you've got some people who are augmenting what the speaker is saying on the telephone call by adding something in the chat and deepening the conversation in a way that you can't on the phone because only one person can talk at a time. Again, do you want that sort of "building the network conversation" or do you want to really focus on one person at a time? These are some choices in using chat.

Using visuals there are web conferencing tools that have whiteboards. One of the tricks I learned is to put up a slide of clip art that has all kinds of funny chairs and when people enter into the web meeting room, there's a little note saying, "Welcome: click on the text tool and put your name under a chair." I upload the Powerpoint slide into whatever tool I'm using and it's worked with every tool I've used; people can write on the slide with the text tools in the application.

Vyew and Dimdim are free ones, Elluminate are tools I've used where this works. I don't recommend Webex nor Microsoft Live Meeting. I like Adobe Connect. The reason I like Elluminate and Adobe Connect is you can have multiple people with multiple roles. So if you are not trying to have a controlled delivery of content, you need to be able to delegate multiple roles to multiple people, in other words have more than one moderator at the same time. With Microsoft Live Meeting there is no group chat, it is only participant to facilitator, which is ridiculous. I never work up that way, I work across. Webex is slightly better; it does have a chat, but you can't have multiple moderators, and when I find that you're trying to create a live web meeting you want one person who is kind of wrangling on the facilitation process, and you want one person who's simply helping on the technology side. And both of them need admin privileges to use the tool

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fully. And so if a tool doesn't allow multiple administrators or moderators then you lose the power of co-facilitation which you guys know is really a fabulous thing to do regardless of whatever environment you're in.

How do you build capacity for virtual collaboration with a group over time?

I think the first question is, "How big is that group, and how inter-related is their commitment to each other. Is it shared, or is it sort of dispersed?"

With 10 or fewer people, committed to each other over time, it's worth the time to build the collaboration. I try to build a technical and a process skill each time we do a synchronous event. If I'm working asynchronously I try to add an asynchronous tip.

My rule of thumb, which is very gross, is one hour of face-to-face time ends up being 1 day online asynchronously. Unless the group is all online at the same time, you can't expect the group to have completed a process you want them to do asynchronously in any time span shorter than a day. The equivalent of a full day face-to-face could stretch out over 8 to 10 days asynchronously. That's a really general rule of thumb.

I like to mix synchronous and asynchronous, and these days I think people have a higher expectation for synchronous for their meaning-making and their active learning; and the asynchronous perhaps for reflection, going off and doing exercises, whatever it is (it depends on what you're doing together of course.) I used to be able to do far more asynchronous stuff with groups, but the expectation for synchronous in my world has grown enormously.

What tools do you use for reflection?

It depends on what kind of reflection -- is it public or private reflection, is it reflection for the group or the individual, and what tools are people already using? Because I think the most important thing when you think about tool selection is to try and spring off of where people already are. People have a diversity of technology comfort, need and familiarity, and if you need to keep people together you have to make something simple enough that those on the furthest end of discomfort can participate, but with enough interesting things that those early adopters won't get bored and say "this is a really dumb tool." It's tricky when you have that diversity.

I'll use either forums if it's a little old-fashioned, or blogs. I like blogs because the person who is doing the reflection is the primary author, so it reflects that this is your personal reflection, and comments allow people to interact with that person, but the primacy is still the author of the blog.

In forum, I often give people their own forum, which acts sort of like a blog. Forums give primacy to the group. Every post has equal weight in how it's presented. It's post, post, post. If it's a group reflection, a forum subtly sends out the message that everybody's voice is important, whereas a blog sends the message that the primary blogger is primary.

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For people who don't reflect well in writing there are some interesting new tools. Howard Weingold, who is kind of a father in online communities has been building an open source learning platform called Social Media Classroom.

<http://www.socialmediaclassroom.org>

It's using an open source content management system called Drupal. It's got a little plug-in that allows people who have a camera in their computer to add a video response rather than having to type. So, if I'm working in a second language and they do not feel secure in English, having an option for video reflection is really freeing for some people. It's intimidating for others. But once again it reflects that we may need different things to do the meaning making or the work we're doing together. The video discussion is built into it -- I can write or I can leave a little video.

The technology is still a little bumpy. If we all have a commitment that we will have this reflection done by this date, it becomes less critical that some are writing and some are video-taping their reflection.

How do you elicit and sustain productive engagement with a group?

How do you do that offline? We can build off the principles we use to "see each other" and create energy in the room in a face-to-face setting. If I am trying to keep a group moving, I am going to add some sort of synchronous element to it -- a web conference, a phone call, a video conference, whatever, because synchronous focuses our attention at the same time.

Then I'm going to say, "Go back to that slide where you wrote your name on a chair. Take your hands off the keyboard. Look at that circle. You can add people's pictures. Imagine we're sitting together on the couch and we've got a nice cup of coffee or tea. We have some chocolate biscuits, and we're looking across the room at each other." I've triggered on that thing that human beings have used for aeons of looking at each other. I've called up my imagination to augment our conversation. By asking people to remember that you're tapping into a very deeply understood experience of sitting in a circle, listening and talking. So, it gives people a signal to listen in the same way we listen when sitting in a room together. These are reminders or cues.

Years ago before long-distance phone calls were affordable and we just did chat, and one person said, "I'm overwhelmed". So we all stopped what we were doing, we opened a separate window in the browser and called up a site that had a beautiful piece of harp music on it, and we asked everybody just to listen to that for a minute. And all the people who were crunched over their keyboards sat up and breathed more deeply, and became more coherent in the conversation. We were more spacious in giving each other a chance to type. We were slowing down. We used music designed for hospice to change our experience.

Not only visual does it -- sometimes it's just a different auditory experience with an invitation to do it. Some of my friends, like Peggy Holman begins by taking a moment of

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silence before starting a phone call. Sometimes that's a bit extreme, but it does cause me to slow down.

As the group gets to know each other, what cues remind us that we're here for something with each other, not multi-tasking and giving partial attention. So, synchronous stuff and processes to get people together.

The second one is agreements. If you're working asynchronously, we have an agreement that we'll all check it daily and put our comments in by Friday at noon. It's making things that we could do with nonverbals in a room explicit.

What technology replicates the sticky wall experience virtually? How do you get a group to see what each other is thinking?

I don't think we have good visual technology for doing sticky wall stuff. There are some post-it note programs -- they come and they go. They come and they go for a reason. The idea is great but the execution is still limited by a couple of things. One is we all have different size monitors. If we all had large monitors we could make a useful sticky wall experience.

I have even make a sticky wall on my own wall and taken pictures to send, but then I am the only one with the sticky wall. Or, we've done it where we all have our own sticky wall, but then it's way too complex. I hate to tell you I've not found a good way yet to integrate large amounts of data.

What I have done is to break it down into smaller chunks and then build it back up. Some of the mindmapping tools like Mindmeister are still hub and spoke in their design. That's the closest I've come to a satisfactory group experience, but it's still hub and spoke design, and the data that I am working with is not always hub and spoke.

What about SecondLife?

The person who has done the most interesting work in SecondLife is David Sibbet at The Grove. He has a customer conference room and gallery. It's a special skill to create objects. If I have an island, there is a lot of pre-design to build the things there. It gets stuck here.

David has done ThirdLife island with a sacred native American circle, and has a group that meets there regularly for their spiritual practice. They've paid great attention to the role of beauty and sound in their space. That is a really powerful thing. SecondLife gives us a sense of a shared environment. If we're all hearing the same ambient sound effects it's important.

I struggle with SecondLife because if you have an older computer, it doesn't work well. My processor on my desktop works too slow for SecondLife so I had the uncomfortable experience of falling down all the time. Nobody likes to look stupid. I could not do those things, and I thought it was me, but it was my processor. I felt like a clutz, and I already am a clutz and didn't want to feel even more of a clutz.

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The most successful experiences I've had in SecondLife is when everyone got a personal orientation to get comfortable, which is a big investment. So, it's still hard. But look at Sibbet's work in SecondLife.

Nancy Margulies has been doing amazing work with online graphic facilitation. This is mainly because she's a brilliant artist. She can get on a phone call and do graphic recording on a tablet. It's not participatory. It's in service of the group.

We always focus on the limitations of virtual facilitation. What does virtual collaboration bring to a group that is not possible in face-to-face?

Networked external support. Face-to-face collaboration privileges those who are in the geography. If the support you need is not in that geography you have to find a way to tap them. Combining online and offline strategies is a real powerful thing. The face-to-face is the one we know how to do best for that "we", but face-to-face doesn't work well for the "network" piece because it doesn't scale. So, the online piece really supports that network side of things.

I think the other thing that online works very well for those who are excluded. You know there are ones in an organization who can fly to meetings, and there are those who can't. Those who can't make use of crappy technology and inadequate process to get things done because they're so motivated. I can see collaborations outside of North America going very well simply because these people are starving for it. They're not given that privilege or the support for their work.

There are definitely powerful things that online collaboration can add, and it goes back to the very first question, "what's the context?"

What key resources do you recommend for our group to get grounded on best practice?

Beth Kanter, who is now a Packard scholar for the year, "Beth's Blog" on the social media side. She's attentive to technology and process.

The book that Etienne Wenger and Jonathan Smith and I are on the verges of getting published called "Digital Habitats", will be out on Amazon by the end of July. Etienne developed the concept of communities of practice and how we learn in communities.

There is not a good central source. This is an aggregation page for people who care about online communities and networks. Use the RSS feed to popup some interesting stuff. Some of the people who I think are good, their blogs filter into that.

<http://cc.fullcirc.com>

Otherwise, it's very diffuse. Some of the most innovative stuff is coming out of the education field, people in libraries. I don't find that the facilitation community has done a lot.

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Holger Newmeyer (sp?) out of Germany has really dived into experimenting with this in the last 6 months. But, I think he's still very enamored with the technology side of it. Watch him, because there will be a phase where he'll back away from that a little bit. Because that's typically what people do. "Oh look, there's technology, think of what we could do!" And then they back away from it a little bit, because then encounter problems with adoption and diversity, and they ask the question, "what is the fundamental thing about this technology that is changing interaction, and then they focus back again on process a little bit more."

David Sibbet has been asking this question a lot. He doesn't blog often, but he's good.

CHAT DURING THE CALL

Nancy White

9:55 AM

Hi here is the chat

9:55 AM

Taking notes in the chat

Sheila Elaine LeGeros

9:55 AM

Hi I see the chat

Nancy White

9:55 AM

Eunice ask question here

Sheila Elaine LeGeros

9:57 AM

What tool do you use for the chairs?

Nancy White

9:57 AM

vyew

9:58 AM

dimdim

9:58 AM

elluminate

Sheila Elaine LeGeros

9:59 AM

How do you build capacity for virtual collaboration with a group over time?

Eunice Shankland

10:02 AM

what tools do you use for reflection

Nancy White

10:04 AM

<http://www.socialmediaclassroom.org>

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Sheila Elaine LeGeros

10:06 AM

How do you elicit and sustain productive engagement?

Eunice Shankland

10:09 AM

Time check... I know you have an appointment, how much longer can we go?

10:10 AM

great... you tell us when you have to go

Nancy White

10:14 AM

www.mindmeister.com

10:26 AM

then we wait for the leaders to retire

10:28 AM

Beth Kanter's blog re social media

10:29 AM

Digital Habitats: stewarding technology for communities

10:30 AM

<http://cc.fullcirc.com>

10:32 AM

David Sibbet

10:32 AM

Holger

10:32 AM

<http://www.ewenger.com>

10:33 AM

etienne@ewenger.com

10:34 AM

Danny should be on the list - duh!

10:35 AM

beth@bethkanter.org