

**ONLINE TABLES & TABLECLOTHS:  
FACILITATING SPACE FOR ONLINE LEARNING & COLLABORATION**

**by**

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**A thesis submitted in conformity with the requirements  
for the degree of Master of Arts  
Graduate Department of Adult Education and Counselling Psychology  
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University of Toronto**

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**Abstract**

This thesis describes the researcher's journey as an online facilitator and reflective organization development (OD) practitioner as she explores how to nurture and cultivate space for learning and collaboration in an online community of practice. The research setting is a small group of mostly volunteers in a national health charity. The researcher adopts a reflective practitioner research approach engaging in a continuous process of story-telling throughout the thesis. She struggles with questions such as her own dynamic role as an outside facilitator, the role of technology, dilemmas of emergence versus design and discovery of purpose. Rather than arriving at a to-do-list for potential online facilitators, she discovers that hosting café style conversations, setting the online tables and enabling space for learning, collaboration and aliveness is more a matter of the facilitator's capacity to listen, to be authentically present and to relinquish control.

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## Chapter One: Seeds of Curiosity & Inspiration

### Introduction: Two Different Stories

In my cubicle, surrounded by the usual afternoon bustle. I am wearing my head set, connected to 10 other people located across the world in the company's subsidiaries. A guy is talking. Seems like a long monologue. I yawn, start checking emails and wonder what train I can catch home.

Suddenly, I am interrupted by a deafening silence. I minimize my email window and look at the online conferencing software. A PowerPoint presentation with some bullet points covers the screen. Looks like I am still connected. Then I hear the facilitator's panicky voice: "Is anybody there?" "Are you awake?" "Do you agree?" My eyes glance over the slide. I find it hard not to agree with the bullet points considering they are part of the company policies. Besides, I do not know the other people or the instructor well enough to feel comfortable raising any questions. Yet, feeling the embarrassing silence creeping up on us, I raise my virtual hand. "Yes", the facilitator seems relieved. I take a chance knowing that I may not say what he wants to hear, "well, I don't really think the last two points apply to my daily work, I..." The facilitator interrupts me, "OK – let's move on to the next slide".

He pulls up a slide with something that is supposed to be a joke. I recognize it as a poorly translated very local joke from the country where I grew up. I cannot see how people react, but I feel it is embarrassing. Nobody laughs. In fact, nobody says anything during the following 20 minutes. At that point, I send a private note to the facilitator, excusing myself, making sure to mention that I "unfortunately" am busy next time we have scheduled a meeting.

Forward the tape a few years. I am the host of a small gathering. I am preparing myself mentally and am now putting out the appetizers and some signs to direct people to the patio, the washrooms and the kitchen. I have made sure I know a little bit about everyone so I can introduce them to each other. I have an idea about their passions, their challenges, their dreams. I have selected some background music. But most of all, I am curious about the flow of energy and the process as the evening progresses.

People start arriving and I walk around greeting and introducing everyone, making sure they feel comfortable and have a rough idea about the evening's program. I had a small game planned for the introductions, but decide to drop it in the last moment because it

does not seem right and people are already getting to know each other. I gently start drawing everyone's attention to some of the conversation starters.

Soon the conversations start picking up. Everyone seems curious to learn from each other. At times the bustling in the room is very intense. But I also notice pauses, silence and moments of deep connection as people listen to each other. Sometimes they break out in laughter, sometimes the seriousness in their faces makes me want to cry. I buzz around often unnoticed, yet at times also very personally engaged. I notice the different roles people take. Some seem to prefer the more quiet reading or writing corners, others tend to stay with the same group, while a few, like myself, buzz around carrying small seeds from one part of the room to another.

I feel relieved as each part of our gathering flows along easily. By the time people start leaving, there is a new bond between us all. It feels like we have discovered together and we are all eager to come back again. I feel enriched, warm, happy and somewhat changed after having taken part in the evening's conversations. Feeling blessed that I was able to host the space for these conversations to take place; I log off my computer and leave my office.

What these two stories have in common is that they both take place online. They exemplify the heart of my experiences over the past years as a learner, practitioner and facilitator online. They represent what I know to be some of the best as well as the worst images and experiences of online learning and collaboration. It is stories like these, paradoxes and dichotomies of aliveness versus alienation online, personal and second hand, which inspired me to this inquiry. It takes place at the threshold between theory and practice. A big part of the process has been the discovery of my own role and values as an online practitioner. How might I, as an online facilitator, practice the art of hosting space for learning and collaboration online?

This thesis is about my journey and discoveries as a researcher-practitioner initiating and facilitating an online Community of Practice (CoP) in a volunteer based national health charity in Canada. The organization, like several others I had encountered, was struggling to redefine its own role and find common ground amongst a growing network of regional partners, local groups and volunteers across the country. The Executive Director and the Director of Education saw plenty of opportunities to deepen connections in the organization by using new collaborative online tools such as wikis, blogs and web conferences. They were committed to fostering long-term learning and relationships and saw a world where the emergence of collaborative tools and pervasive access to knowledge online increasingly was enabling new

ways of collaborating and learning together. Yet, they were constantly faced with the question of *how* they could support and nurture these possibilities. They also recognized what they described as a certain “technology fear” in the organization.

Their experience resonated with me. Working in the corporate sector and later as an online trainer and facilitator, I had noticed how people seemed to lose their creativity and energy – even their sense of self-esteem when they found themselves more or less forced to keep up with technology, hold online meetings and all of a sudden were expected to collaborate online without the familiarity of face-to-face social interactions. This saddened me.

At the same time, I could think of several situations where I as learner or facilitator almost felt born again as I discovered my own being in a new way online. As a facilitator of best practices in synchronous meetings, I had experienced the joy and excitement in the air as people started to find their voices, feel alive and learn from each other online.

Inspired by organic and systems theories of organizational learning and change, which emphasized the need to *cultivate the ground* and *create space* for people’s ideas to grow together (i.e.; Brown & Isaacs, 2005; Owen, 1997, Senge, 1996), I started thinking about nurturing online spaces alive with energy, dialogue and creativity. As I recalled growing up in Scandinavia sipping café au lait, engaged in intimate, deep conversations with friends around small café tables, decked with tablecloths, candle lit, in a bustling warm alive café atmosphere, I became conscious of the need to find similar experiences online. What if I could find ways to put the tablecloths on the online tables and honour people’s voices and experiences? How could I be an online host that “designed” for aliveness?

With a belief that learning is fundamentally a socially constructed process and that dialogue and deep listening are fundamentals of learning and collaboration, I focused my inquiry on an online CoP. I saw CoPs as powerful ways for organizational members to continuously develop capabilities to learn, innovate and share knowledge informally, and I knew that the proliferation of collaborative online tools had increasingly allowed such communities to develop across traditional organizational and geographical boundaries (i.e.; Kimple & Hildreth, 2004; Lai, Pratt, Anderson, & Stigter, 2006). I saw how the question of facilitation and leadership online appeared like an ongoing challenge amongst practitioners and researchers. As a practitioner of Organization Development (OD), it intrigued me that supporting these types of informal networks and communities was apparently so challenging for organizations.

Eager to create connections between research and practice, I chose to engage in a research process drawing on elements of both reflective practitioner research and action research by acting as an initiator and facilitator of an online CoP for the health charity. I

decided to set up a wiki as well as look for other tools for the community's interactions across distances. This online CoP is what I will refer to in the thesis as the Online Advocacy Café.

When I invited people to participate in the CoP, I emphasized that this was to be a community voluntarily coming together to explore the use of online collaborative tools for their daily practice within the organization. As an (action) researcher I thus played the double role of a researcher-observer and a practitioner-facilitator. I consciously engaged in continuous cycles of plan-act-reflect. My engagement in the community allowed me to focus my inquiry on the effects of my own actions and experiences as an initiator and facilitator of the community, while simultaneously drawing on participants' experiences and reflections on the process.

The journey did not progress in the linear, controlled fashion that I expected or perhaps hoped for when I planned it. Like life, it was bumpy, unexpected, emergent and in the end much more rewarding. I was often tempted to deem the research a "failure" and it was not really until afterwards that I started discovering the layers of complexity, discovery and learnings and realized that I had actually achieved what I set out to do. My questions had been turned upside down in the process of exploring how I might most usefully deck the online tables and create space for this group of people to collaborate and discover themselves online. I had come to a deeper understanding, in practice, about my role and challenges as an online facilitator. I had discovered. I had personally changed.

### **Who Should Read This?**

The primary audience for my thesis is facilitators, leaders and OD practitioners who are interested in cultivating and facilitating online learning, collaboration and/or community in their organizations. As my perspective and values are grounded in the field of OD and I enter as an outside researcher/consultant, I expect that external OD practitioners in particular may be able to recognize elements of interest.

However, the thesis is not exclusive to either the field of OD, or to the "online facilitator world". I believe several elements in my process are recognizable to any leader, learner or practitioner interested in collaborative learning and organizational change. Indeed, it is my hope that the reader is left not so much with the dichotomic question of whether to work online or not, but rather, that I may inspire others to take part in processes that identify the contexts in which technology might become the tool that helps people discover their collective energy and do what they really want to do.

## Background and Literature of Inspiration

### *Learning in Organizations*

Through my work with organizations, learners and online facilitators, I often see a keen espoused commitment to sharing ideas and fostering long-term learning using online technologies. However, reality often looks different. Online learning and collaboration is nested in a discourse of cost reduction and ability to connect individuals and knowledge across distances. This discourse has pushed individuals to use online technologies for collaboration, training and education and drowned learners' voices and creativity in a technical agenda. As a result, most people with some exposure to online learning can report experiences of fear, alienation and disengagement, either as learners or as facilitators.

My research comes out of a belief that it is necessary to start from the heart, rather than starting with the technologies. As facilitators and leaders of organizations, we need to better understand the processes of online learning in order to move beyond the discourse of what technology enables us to do and show that there is more to learning than cost reduction and a technical possibility of connecting people across distances. It is about nurturing social "space" for *real* people to keep and continuously discover their *realness*, their voice and their creativity.

In organizational theory, the learning organization (i.e., Senge, 1996) and the notion of organizational learning (Argyris & Schön, 1978) have been both aspirational and debated concepts. The promises of an organization "that learns continuously and transforms itself" (Watson & Marsick, 1993, p. 8) and of learning as a generative and transformative process (Argyris, 1994) that enhances our capacity to learn through aspirations, complexity and reflection (Senge, et al., 1999) have been attractive to organizations as well as employees since first introduced in 1978 by Argyris and Schön and later by Senge in 1990.

While some critique the learning organization for its "implicit controls" and "manipulative ideology", asserting that it is a utopian ideal with little relevance to reality (see for example Driver's (2002) review of the learning organization as either "foucauldian gloom" or "utopian sunshine"), others simply recognize that organizational learning is difficult to implement in practice and that organizations need concrete examples of how complex notions such as informal learning translate into daily work life (Laiken, Edge, Friedman, & West, 2008).

Senge (2003) recently assessed Argyris and Schön's (1978) concept of organizational learning, arguing that the thinking is still highly, if not more, relevant today, in spite of the fact that the effect on management practices so far has been small. He concludes that organizational learning is a challenge because it is a long, time-consuming, deep, personally challenging and inherently difficult journey (Senge, 2003, p. 49). Indeed, one may be tempted to ask if we would still have experienced a global financial crisis in 2007-2009 if honest inquiry,

dialogue, collaborative learning and reflection had been part of the daily practice and leadership in the 10 largest American and European banks and insurance companies.

Recent approaches to organizational learning and systems change have increasingly shifted the emphasis from looking at individual and team learning in organizations to a stronger and more holistic focus on collective exploration and discovery (Holman, Devane, & Cady, 2007). Organizations, people and the world are seen to co-evolve as people interact (Wheatley, 2006). Indeed, Senge, Scharmer, Jaworski and Flowers (2005) discuss “a second type of learning” (p. 86) where individuals start seeing themselves as interconnected and part of the whole (pp.88-92). This involves “sensing”, “presencing” and “realizing” in a process that moves beyond reflection on action to co-creation and unbroken awareness.

However, when assessing the challenge of organizational learning today and searching for concrete examples for daily work life; it is useful to look at the recent decade’s emergence of the Internet and collaborative information and communication technologies commonly labelled as Web 2.0 or social media tools. This emergence has not only led to a pervasive access to knowledge online for increasingly dispersed organizational members and stakeholders, it has also fostered new ways of collaborating and learning together where everybody is potentially connected in relationship and knowledge is arguably no longer based on hierarchy. In this “new world”, we may understand organizations as complex systems made up of networks of relationships, neither confined to the formal organizational hierarchies, nor to the physical or structural walls of the organization (Wheatley, 2006). Such patterns may indeed characterize society in general (Castels, 2000).

Thus, today’s organizations embarking on the journey of organizational learning will not only need a deep commitment to long-term learning; they will also need to understand learning and collaboration in an increasingly complex and networked virtual world. Without such an understanding, leaders, facilitators and organizational members at large might find the challenge of translating the concept of organizational learning into practical real life examples impossible.

### *Communities of Practice*

The CoP literature became interesting to me precisely because of its focus on community and process before technology. In addition, several CoP professionals were asking great questions about facilitation and implementation of CoPs, which appeared helpful to consider for any facilitator of groups or communities online.

CoPs are seen as powerful ways for organizational members to continuously develop capabilities to learn, innovate and share knowledge informally (Wenger & Snyder, 2000;

Wenger, McDermott, & Snyder, 2002). The term *community of practice* was first introduced by Lave and Wenger (1991). The basic notion is that learning is a socially constructed process happening in relationship with others who share the same interest and practice. Usually, the objective is to create knowledge and improve a shared practice (Lai, et al., 2006). Since the concept was first formulated, it has been widely adapted and expanded on in the management and OD literature because of the promise to improve organizational effectiveness as engines of new knowledge (Kimple & Hildreth, 2004), to systematically build strategic capabilities (Saint-Onge & Wallace, 2003), and to serve as the foundational structures of knowledge organizations needing to constantly adapt to a changing environment (Wenger, et al., 2002).

When I looked at Wenger, et al.'s (2002, ch. 7) description of what it takes to allow CoPs to flourish, I was reminded of some of the elements of Senge's learning organization: leadership at multiple levels, compelling visions, community development, questioning the status quo and the fundamental support of the complexity and the unstructured nature of CoPs.

In thinking about the facilitation and development of my online CoP in the national health charity, I found it useful to consider Wenger, et al.'s (2002) structural elements for developing a CoP: domain, practice and community. The domain is the topic, which "creates a sense of accountability to a shared body of knowledge" (p. 30), while the practice is a "set of frameworks, ideas, tools, information, styles [...] that the community shares" (p. 29). The community is the "social fabric of learning" (p. 28) created through regular interaction, trust, relationships and mutual commitment. In my case, I considered the domain of my community relatively fixed to be *advocacy*; I saw practice and community as something that needed to emerge over time as conversations and patterns of behaviour developed amongst participants.

One of the intriguing aspects of CoPs for me was the dilemma of facilitation and leadership since CoPs by definition develop as a natural and sporadic process (Wenger, 1998; Wenger, et al., 2002). According to Lai, et al. (2006), many respected researchers and proponents of CoPs assert that "CoPs cannot be made but [must be] grown" (p. 33). Still Wenger, et al. (2002) suggest seven design principles in order to cultivate and design for the "aliveness", spontaneity and self-directed nature of CoPs, and other researchers offer conceptual frameworks for building CoPs (Saint-Onge & Wallace, 2003) or argue that "organizations have an important role to play in facilitating their [CoPs] emergence, supporting their development and sustaining their activities" (Bourhis, Dube, & Jacob, 2005, p. 23).

Further, it has been suggested that one of the distinguishing features of an online CoPs, as opposed to a co-located CoP, is that they are top-down designed and coordinated by an assigned leader (Lai, et al., 2006). The authors identify the characteristics of online CoPs and how they differ from co-located CoPs. They address the debate of whether relationships

and trust can be built online and whether tacit knowledge and practice can be shared. Finally, they outline a number of design principles for effective online CoPs, although they hold that these have not been adequately tested.

It thus appears that while we cannot plan and design a CoP or online CoP as a finished structure or product, there is some room for an intervention that seeks to design and facilitate to ensure that the conditions for “aliveness” exist. As a leader or a facilitator of online learning and collaboration, it is also useful to pay attention to how question of design versus emergence may be highly context dependent (Laiken & Federman, 2008). However, I am cautious that an attempt to apply too much *design* to a process may result in too little flexibility. In my experience, a design is only good as long as the facilitator is able to adjust and change it along the way depending on the situation. To me this type of design is about a foundational and deep understanding of methods, systems, processes and people. The deeper the understanding, the more sincere the facilitator when it comes to deviating from design.

Especially in the context of technology, the word *design* may often denote a feeling of a system – a machine - that needs to be designed. Thus, the design elements I sought were more context and value based and related to the “underlying truths of the work” (Cady & Dannemiller, 2005). I was not creating or designing my community. In a sense the people I worked with were already a loosely connected community and I was at most “shepherding their evolution” (Wenger, et al., 2002, p. 51). Yet, this polarity between structure versus emergence was one I kept returning to during the process. Ideologically, I wanted to allow for as much self-directed growth as possible. However, in practice I often experienced a pull toward more initial technical guidance and a more structured and directive approach to facilitation not unlike what is known as “situational leadership” (Hersey, Blanchard, & Natemeyer, 1979, as cited in Laiken & Federman, 2008).

### *Facilitation and OD Methods*

My understanding of the world through a whole systems lens on organizations and change has been inspired by OD methods generally described as methods for engaging whole systems in change (Holman, et al., 2007). This includes methods such as *the world café* (Brown & Isaacs, 2005), *open space* (Owen, 1997), *dialogue* (Isaacs, 1999), *appreciative inquiry* (Watkins & Mohr, 2001) and *future search* (Weisbord & Janoff, 2000).

What stands out for me as an underlying theme of these methods is the focus on collaborative exploration of knowledge and common ground *within* the community of people. Change is seen as a process rather than an event and the facilitator's role is to work with people as part of the process, hold the space, weave the connections and host the

conversations. As in participatory action research, the facilitator rarely takes a directive expert role. Yet, she is attentive to new seeds of actions, which may move people out of their comfort zone. This has also been described by Weisbord (1987) as the consultant's task "to see confusion and anxiety through to energy for constructive action and to learn along with everybody else" (p. 14). It is the consultant's own ability to model authentic and honest behaviour, which enables and inspires the community to do the same (Archer, 2009).

In the management and leadership literature this role is also described as stewardship or servant leadership (Block, 1993; Greenleaf, 2002; Senge, 1996; Wheatley, 2006). Leaders and consultants are called upon to get real, be authentic and stop trying to be the heroic leader (Archer, 2009; Joiner & Josephs, 2006; Wheatley, 2002a). Senge (1996), for example, suggests that "leadership in learning organizations centers on subtler and more important tasks" (p. 321) and Wheatley (2006) discusses a need to preach to the choir by helping "those who already share certain beliefs and dreams [to] sing their song a little clearer, a little more confidently" (p. 151).

#### *Going Online: Learning to Learn and Facilitate Online*

One of the main seeds that spurred my interest to do research was the question of exploring reflective practitioner research, OD and facilitation in an online context. What would it look like if I started thinking about nurturing online communities alive with energy, dialogue and creativity? How would my actions as a facilitator cultivate the ground for collaborative exploration and learning for a group of people? What if I focused on process and community building, rather than on technology and problem solving? In what ways might I facilitate the community's understanding of its own energy and process in an initially unfamiliar context of online collaborative tools?

In my own experience, online facilitation was most successful when the emphasis was on "facilitation", rather than "online". That is, knowledge and application of facilitation and learning theories from OD and adult education were far more important as a starting point than technical expertise. An emphasis on facilitation to me meant that people and processes came first. It felt like a reinforcing and appreciative stance, since the point of departure was the knowledge within ourselves about our basic human needs for relationships, trust, inspiration and learning. It was also encouraging to think about building on methods and practices that already worked well within OD, facilitation and adult education. Perhaps most of us knew a lot more about online facilitation than we thought...

I found support for the importance of emphasising facilitation rather than technology in case studies on virtual teams and virtual CoPs. Such studies indicated that technology did not

generally play a major role when measuring success and failure (Caulat, 2006; Duarte & Snyder, 2006; Trembley, 2006). Leadership or facilitation was more important (Bourhis, et al., 2005). A common pattern was also the Caulat's (2009) position that online facilitation and learning were skills in themselves that needed to be learned:

Generally our research has led us to realise that managers and leaders have been brought up in a face-to-face direct leadership paradigm and are often unprepared to lead and work virtually. However, we have come to the conclusion that virtual team work and virtual leadership are best approached as a totally new concept and experience for the team. This involves some well established as well as distinct methods, activities and competencies. We have to learn to work effectively in virtual teams. We have to develop as virtual leaders. (para. 5)

As a management consultant, Caulat's emphasis was on corporate leaders. Nevertheless, I found a similar emphasis on the need to focus on and understand social interactions virtually when learning, facilitating and building community online amongst other practitioners (i.e., Gerard, n.d.; Hofmann, 2003). There were ample check lists, best practices and bags of tricks to support the facilitator in this practice (i.e., Anderson, et al., 2006; Bourhis, et al., 2005; Bozarth, 2005; Choden, 2000; Hofmann, 2003, McDermott, 2001; White, 2004). Every time I came across one, I would feel it all sounded terrific, yet, although inspiring, none of them helped me understand *my* specific context as an online facilitator. I realized that online facilitation contexts were so varied and complex, spanning from a new form of relationship marketing, to large advocacy and community mobilization efforts, to directed training modules on a multiplicity of topics. Context mattered.

Wenger, White and Smith (2008) describe how the first and foremost step of an online facilitator (they call it "technology steward") is "to understand your community and its circumstances" (p. 2). Their first principle in the work of a technology steward is to focus on vision before focusing on technology. In their summary for practitioners they provide comprehensive checklists with questions related to the community's characteristics, orientation and current make-up. Lai, et al.'s (2006) literature review of online CoPs highlights the necessity of considering the specific community's need when designing and choosing technology, and Nickols cautions us to "resist the urge to reach for technology [since] most CoPs can make do quite nicely with telephone calls, e-mails and occasional face-to-face meetings" (Nickols, 2003, p. 15). Finally, Wenger, et al. (2002) warn against papers, memos and Web sites, which "come to define the community, displacing other aspects of community such as relationship building or collaborative problem solving" (p. 148).

## OD and the Reflective Facilitator-Practitioner: My Values

Intention...

Saturday morning in the yoga studio. Women chitchat in an easy and honest manner magically enabled by having practised yoga together. I silently enjoy the voices as I gather my clothes and start thinking about my work awaiting me at home. Then, all of a sudden I hear one voice clearer than the others: "In yoga, it is not about how deep you get into the pose, it is about the quality of your intention"...and all of a sudden I see it, the connections to my work, what I value. "The quality of my intention...", depth, size, scale of change or intervention...all seem to matter so little if the quality of my intention is not there! As I walk home, this sentence keeps ringing in my ears: The quality of my intention, the quality of my intention...

When going into a new yoga pose, it is tempting to peek to other yoga practitioners and marvel at the beauty of their poses. In my own eagerness to do things right, I often look at that perfect result or model for the pose and attempt a hurriedly mirrored position, meanwhile forgetting that the real benefits of yoga is about breathing and listening to my own body. Getting deep into a pose without this intention in mind, might cause more harm than good.

As I moved, walked, breathed, climbed, stumbled and danced through the lands of my thesis journey, it was helpful to remind myself of my intention to stay authentic to myself and to listen to the reality of the individuals and the whole system, rather than looking for an abstract idea of the perfect result. The holistic picture, which emerged through this practice, was my way of linking theory and practice. It was my "living knowledge", which I now also see as an integral part of doing "reflective practitioner research". In the following, I offer an insight into what that means to me and how I see this type of research nested in my practice as an OD practitioner. I also suggest how this type of research may be valuable to a more general audience of practitioners and leaders within organizations and communities.

Locating myself as a practitioner and researcher within the field of OD to me means that I value a holistic way of thinking about individuals, organizations, community and society, which focuses on processes, systems, meaning, relationships and paradoxes (i.e., Capra, 1997; Senge, et al., 2005; Wheatley, 2006). Such a perspective implies that individuals are understood as part of the world, rather than separate from the world (Senge, 1996). It is also a qualitative research understanding of OD, which does not try to separate the knower from the known (Boston, 2000; Maykut & Morehouse, 1994) or to draw generalizable conclusions. In other words, I neither wish to, nor believe it possible to stand outside as the impartial observing researcher and consultant. I am part of the research. My reflections, the meaning I see and my

personal judgement are part of the research. Similarly, my community is special, nested in a specific context and full of unique individual experiences.

A more traditional positivist approach to consulting might be described as an “expert approach” (Stroh, 1987, p. 49) or as the “cause-effect reasoning” of Taylorism (Weisbord, 1987, p. 8). Like these authors, I find myself seeking alternatives. I do not wish to portray myself as the expert who enters the organization to *diagnose, plan* and *design* strategic change for people, nor fall victim to the “cause-effect thinking” of a diagnostic model of consulting, where challenges are seen as sicknesses to be treated with *the* right remedy (Weisbord, 1987). This has been important for me to realize, since the structural demands of my professional and academic reality often pull me in a more positivist or expert-like direction. A positivist research tradition, with its separation of humans from their context, may isolate humans from technology and study the two as separate parts. This is exactly what I have experienced as alienating and harmful in my work as an online facilitator. I do not believe this would have allowed me to find answers to my questions.

Senge, et al. (2005) argue that we as individuals, researchers and organizational members are “not passive observers of an external world, rather, we know our world through interacting with it, and our emotions can limit or enrich that interaction” (p. 197). More than just an approach to research, this can even be seen as a foundation for linking research and practice, thus making my thesis relevant to the experiences of other practitioners: “Action research carried out with a systemic perspective in mind promises to contract meaning that resonates strongly with our experiences within a profoundly systemic world” (Flood, 2006, p. 127).

In line with such systemic perspective, I have not aimed to “solve a problem”, but instead considered my interactions with the organization to be a possibility for creativity, dialogue and inspiration (Watkins & Mohr, 2001). This is a personal value stance. But it is also a stance I have developed through experiencing how the way hold up the lantern and ask the questions initially shapes what people see (Shank, 2002). I have seen how constructive intent and an appreciative stance (Watkins & Mohr, 2001) inspire action in practice and open possibilities no one knew existed.

A holistic perspective for me also means that I do not attempt to separate my experiences and learnings on this thesis journey from my past experience. I believe learning and understanding reveal themselves as spirals of learning through connections and meaning-making from experiences, past and present. This belief is indeed fundamental to much thinking in adult education (Bateson, 1994; Griffin, 1988; Kolb, 1984; Mezirow, 1991; Vogel, 2002). Bateson (1994) describes how “the process of spiralling through memory to weave connection

out of incident is basic to learning" (p. 11). Similarly, Griffin (1988) depicts learning as a dynamic pattern or flow where relationships are not always revealed until later, and Vogel (2002) discusses the truth that past, present and future are interwoven in a myriad of ways.

As I found myself drawn into research and became conscious of connecting experiences with new understandings, I increasingly started to experience how these spirals of learning unfolded as spring flowers out of the snow. This made it a natural choice for me to engage in reflective practitioner research. Separating my experienced life from my research did not only seem like a futile endeavour, it was also impossible for me. As much as theoretical inspiration made sense for me on an abstract level, it only became really intriguing once brought to life by practical experience:

I do not separate my scientific inquiry from my life. For me it is really a quest for life, to understand life and to create what I call living knowledge – knowledge which is valid for the people with who I work and for myself. (Swantz, as cited in Reason & Bradbury, 2006, p. 1)

The notion of action research as *living knowledge* spoke to me of a promise of connecting life experiences sometimes falsely separated into different parts and categories. Why pretend that research and knowledge generation only take place in academia?

It follows that I look at theory as inspiration, rather than a guide for my research. As I learn through actions, theories are expanded and point me in new directions (Herr & Anderson, 2005). They contribute to understanding of actions as they happen as a dialogue between my observations and what others have written or understood. They facilitate insights and conceptualizations in action and upon action (Schön, 1983), again adding new theories, thus enabling living knowledge.

### **Emerging Understandings, the Shift and the Search for New Answers**

As a researcher-practitioner-facilitator, I had an agenda about facilitating learning and collaboration in an online CoP. What made the process challenging was the tricky balance of following that agenda, while becoming increasingly aware that this agenda needed to be based on what mattered to people, their context and what they wanted do within the limits of my research. This balancing act led me to insights, which caused somewhat of a shift in my focus of inquiry.

The initial curiosity of what happens for learners in online learning, collaboration and community building, increasingly evolved into a stronger focus on my own facilitator approach as essential to the possibility for community and learning to occur in the first place. It was a shift from looking at moments of learning, to realizing the value in a process of self-discovery in a

world of multiple online possibilities for me as well as for participants. Where I had previously looked at ways to enable space for learning online, I now started asking deeper questions about my role as an online facilitator in helping people discover online collaborative technologies as possible tools to assist their work on what truly mattered. As the reader will experience, this was a highly self-reflective process.

From the beginning, I had been aware of the importance of a people- rather than technology-centred approach to facilitation. As it turned out, finding out what that looked like in practice was a journey with several surprises. To my surprise, my own ability as a facilitator to be a weaver, to sense the moment, build relationships and listen, even when nothing was said out loud, was much more important than planning and designing a great process and a fantastic technical platform for us to interact. Getting to know people was essential.

The experience of working with people in the Online Advocacy Café helped me realize that a people-centred approach was about finding out what was real to people, that is, what mattered to them and their specific context. I saw how focusing on people this way allowed them to *feel* real, that is, to engage in activities meaningful to them as the individuals and as the group they were. I saw how the usefulness of technology as a tool was directly dependent on such a foundation.

As such, towards the end of the research, I realized how my initial awareness of a people-centred approach and the later understanding of *being real*, was directly aligned with my values as an OD practitioner and with the notion of being true to myself and practicing with *authenticity*. My journey was valuable because I did not try to hide the fact that it did not turn out as a best practice example of online facilitation. In this way, I came full circle as a new concept of *authentic online facilitation* emerged. It was not a set of general guidelines for online facilitators; rather it was an experience of a reflective practice founded in honesty, authenticity and discovery *with* people. It was a practice of awareness and of trusting and honouring the process with (or without) technology as a useful tool.

The shift to a stronger focus on my own facilitator role was enabled by reflection in and on practice (Schön, 1983), by letting go of my own need for certainty and control and by allowing new discoveries in practice to inform my search for answers in the literature and amongst other practitioners. Throughout the process, as well as looking at more traditional sources of literature such as journal articles and books, I sought insights and experiences amongst other practitioners in blogs, Web sites and postings in public discussion fora or mailing lists such as the Yahoo Groups on Online Facilitation and on Communities of Practice.<sup>1</sup> I also

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<sup>1</sup> See <http://tech.groups.yahoo.com/group/onlinefacilitation/> and <http://groups.yahoo.com/group/com-prac/>

participated in an online workshop on CoPs<sup>2</sup> with leaders and practitioners in that field and found it an excellent forum to discuss my current challenges and ask questions of others. Thus, the reader will experience me in conversation with the literature and the emerging field of practitioners throughout the thesis. As understandings emerged, I asked new questions and sought new insights that guided my journey.

In this way, I also started discovering a field of online practitioners not so present in the academic literature, nevertheless, with a collective practical knowledge highly relevant to my inquiry. Indeed, as I was writing the *Story of the Online Advocacy Café*, one of these experienced online facilitators/practitioners, Nancy White wrote in a discussion group on online facilitation:

We are probably very unconscious of our own collective practice. Our field has evolved considerably. I'm not sure we, as a set of practitioners, have had the chance to reflect on its growth and adequately describe it. (White, 2009)

It was encouraging for me to discover such online practitioners with a consciousness towards intention, nurturing and facilitation rather than a sole focus on technology. This confirmed to me that the *online* aspect of online facilitation was not merely an add-on to facilitating face-to-face. Online facilitation was a skill in itself and there was a whole field of practitioners and knowledge out there. There was an awareness of technology without an overemphasis on it (Wenger, et al., 2005). I saw clear parallels to my values within OD. Interestingly enough, this awareness seemed more prominent the more I turned my gaze away from academia and on practitioners.

During the process I kept a journal with personal field notes, reflections and ideas, along with impressions from the literature and conversations with other people online or offline. Since I was doing reflective practitioner research, this log of events and reflections became a valuable set of data on my experience as a facilitator in the community. In addition, through emails and the wiki, the process was nicely recording itself.

### **Unfolding the Spirals of Learning: How to Read This Thesis**

The thesis reveals itself as a story written as three learning cycles (Kolb, 1984). Chapter One, *Seeds of Curiosity & Inspiration* starts with an introduction to the research, my inquiry, context, literature, values and methods. Chapter Two, *The Story of the Online Advocacy Café*, sets the research scene and context, introduces the organization and the participants and tells the story of my experience during the three months I was involved with the

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<sup>2</sup> The workshop entitled: "Foundations" is put on by CPsquare twice a year. See also: <http://cpsquare.org/edu/foundations>

organization. It is the narrative of how things unfolded from my perspective including my reflections in and on action, journal notes and communication with participants throughout. Chapter Three, *Discovery*, discusses my emerging understandings and discoveries as I reflect on my experience with the Online Advocacy Café, start asking new and different questions and linking this to literature and my values as an OD practitioner. Finally, as a meta learning cycle on top of the three others, Chapter Four, *Conclusion & Implications* discusses my findings and new understandings of the online facilitator's role in creating aliveness and enabling space for collaborative learning online. As well, it reflects on the relevance and implications of the research for organizations, practitioners, researchers and learners. Aspects of research method are explored throughout chapter one to four.

The thesis thus moves from my general questions, to my specific story. While not generalizable in the scientific sense, the specific story allows a deeper understanding of the whole, not just in the setting of this research, but potentially in other settings where similar dynamics are at play. Thus, the three learning cycles follow my journey and new understandings chronologically, but they are also connected in the discovery process. In writing the thesis, I have not attempted to separate out action from reflection, interpretation, literature and understandings. I consider this interlinked and my intent has been to invite readers to live with me through the experience and dilemmas of the researcher-practitioner as I learned.

I enter as an aspiring OD consultant, a budding researcher and a seasoned online facilitator. This makes me wear a multi-layered coat of researcher-practitioner, of lived experience versus theory and traditions. I operate in a field of OD, shaped by its academic history and values as well as its societal and structural pulls. The alluring ground of the researcher-practitioner pulls me towards action research, and my practical experience pushes me towards pragmatic challenges as experienced by me and the people I work with online. My theories on social and organizational learning are impatiently waiting to be contextualized.

## Chapter Two: The Story of the Online Advocacy Café

### Setting the Stage: The Research Scene

#### *The Organization and Their Questions*

I chose to work with a national health charity because I was curious about how they were responding to opportunities to work and collaborate online. The organization had its national office in Toronto and worked with 12 regional partners, volunteers and several local chapters and support groups throughout the country. It recently celebrated its 40th anniversary as a corporation. The role of the national office was to be the national voice in research, advocacy and education related to a neurodegenerative disease (the disease) that affects many Canadians. Support and education to the regions, advocacy and fundraising were major tasks occupying the office of approximately 25 people.

One of the key challenges for the organization was to be able to connect people better to work and share knowledge more efficiently and effectively across distances in a loosely connected organization with regional offices and local volunteers. Sitting in the national office, the President and the Director of Education saw possibilities of increasing collaboration and communication with partners, volunteers, regional and national committees by using collaborative online technologies. The challenge of collaboration, communication and support across the country was not new; however, with the emergence of more sophisticated tools for online collaboration they felt that new opportunities had to be taken advantage of. Yet, they were struggling with how to communicate those possibilities to the rest of the organization. They told me they were not sure what was holding everyone back and they were very interested in my idea to research the process of online learning and collaboration.

I recognized the questions they were asking about using technology, based on my own experience in the corporate world, but I was also curious to see how the specifics would play out in a non-profit organization of mostly volunteers, more loosely structured and with presumably more community orientation than I was used to. As I started the project, I did not know much else about the organization except what I learned from a few meetings with the President and the Director of Education from the national office. I had also been part of the facilitation team during the organization's annual meeting and vision summit a year earlier. However, during the course of my involvement I learned more about who they were and the context in which they operated. And I increasingly came to understand the significance of this context.

### *Identifying Participants and Objectives*

For the purpose of my research, I intended to involve 10-12 participants over a period of three months. This was roughly the number of people in the National Advocacy Committee (the Advocacy Committee). After the three months, I would officially withdraw from the project and leave it entirely up to the group whether they wanted to continue the community and open it up to additional members. However, based on my experience and a review of the literature (i.e., Wenger, et al., 2002), I decided to get a few key people involved as a core group to begin with. As my internal allies, I hoped that they would provide a bridge for me into the organization and to the rest of the advocacy people.

In my conversations with the President and the Director of Education I emphasized the need to find a group of people who were genuinely interested in developing more knowledge and in collaborating within a specific topic area during a couple of months of frequent interactions. They did not need to have any experience working online, but they would have to be interested in trying. The President and the Director of Education suggested that I work with the advocacy people, which consisted of the National Advocacy Committee, regional committees and loosely connected individuals involved in advocacy on a volunteer basis across the country.

My notes from the initial conversations with the President and the Director of Education indicate some of the reasons we chose to work with the advocacy people:

The advocacy people seem to be a group of tech savvy keepers who are very passionate about having things happen. They are volunteers, but very committed. Most of them have [the disease] themselves. (personal journal, October 27, 2007)

In addition, we discussed initially how this group could indeed be a seed for the organization as a whole as champions or role models within online collaboration. I also gathered that they had a more independent drive than others since their activities were not controlled by regional offices.

The suggestion to name the project the Online Advocacy Café was made by D (Director of Education) during one of our initial conversations. I thought it was important that it was her suggestion and that it nicely reflected my wish to facilitate a sense of comfort, informality and trust. This was something I had emphasized from the beginning, along with the importance of creating community feeling and conversations similar to those taking place around the tables in neighbourhood cafés.

Shortly after the conversations with the President and the Director of Education, I had the chance to present my ideas to a couple of key advocacy people, A and C. They were interested and agreed on behalf of the Advocacy Committee to be involved. They also told me

that they were very interested in finding new ways to use technology because the Committee had just decided on a vision to mobilize 300-400 people throughout the country, one for each constituency, for their advocacy work. Initially, I was happy and optimistic about having found some participants and about getting started. Yet, as things unfolded, I was not able to effectively follow up with this core group of people or their ideas before the start of my maternity leave. As a consequence, this first phase of the research came to a close, and eight months later, I contacted the group again at a slightly different moment in their evolution.

The main participants in the Online Advocacy Café (the core group) were:

D, Director of Education, staff member and part of the Advocacy Committee;

A, Chair of the Advocacy Committee, volunteer, had the disease himself;

C, Part time contract staff supporting communications, PR and advocacy, playing active role in leadership of advocacy committees and work.

M, President of the organization and part of the National Advocacy Committee.<sup>3</sup>

M was generally too busy to be actively involved, except for a few visits to the café wiki and a personal phone call at some point, after which she was able to push things along. However, eager to have her management support, I kept the door open for her, inviting her and copying her on our email correspondence.

As it turned out, only one additional member of the Advocacy Committee, L, became actively involved in the project during the three months. At first it worried me that this was a significant failure in one of my goals. However, on reflection I began to see that the project had generated awareness and planted some seeds with a broader group of people in the national and one regional committee, as I will elaborate on towards the end of my story.

In my communication at the start of the project, I described the purpose of the project from the organization and the participant's viewpoint, first, to explore how online collaborative technologies could be used in their advocacy work, and secondly, to explore and build a space to share ideas around their advocacy work. As such, one objective focused mostly on exploring the tools, and one centred more on including some content in the exploration by sharing real ideas on advocacy.

From my perspective as the researcher and facilitator, I was there to explore through actions and reflections how I could help people work in an online space that allowed them to achieve their objectives. I also hoped to be able to understand what happened in an online process of learning, collaboration and community building. Perhaps I would even be able to explore a new and different way of being for myself and for my participants online, which would allow us to feel alive online, find our voices, start from the heart and stay true to our values.

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<sup>3</sup> Participants' initials have been changed in order to protect their anonymity.

I recall having some early second thoughts about laying out the objectives for people in this way. I felt it was somewhat against my values as an OD practitioner to define everything beforehand, rather than developing the project with the participants. However, as a researcher, I needed to propose a somewhat concrete project. The only way I felt I could get around this was by having initial conversations with the President and the Director of Education about where they saw the needs, challenges and energies in the organization. It was also reassuring for me to have met A and C from the Advocacy Committee and to have their support.

### *Working and Communicating Online*

All communication with the organization, the core group and intended participants was done by email, phone, Skype and conference calls and through the community wiki created by me. I had originally intended to use web-conferences as well, but as the project was rolling, introducing one more new technology seemed like more than the project or the participants could embrace.

While I was looking at the processes of online learning and collaboration for this organization because of my own research interest, working online or non-face-to-face was also a necessity. Firstly, participants were not located in the same office on a day to day basis and many of the intended participants were even spread from one end of the country to the other. As a non-profit organization working with volunteers, the options to bring people together in physical meetings were fairly limited and generally only happened once a year for some of them during the annual national meeting or the annual national committee meetings. Secondly, since I was still taking care of my 8 month old daughter more or less full time, I was personally unable to plan much face-to-face interaction or meetings out of the house. These two factors are interesting for the study, since working at a distance was not only a choice, but also a necessity for the participants as well as for me in the researcher and facilitator role.

### *The Choice to Work on a Wiki*

A wiki is “a piece of server software that allows users to freely create and edit Web page content” (Cunningham, 2002). It allows users to enter the wiki and communally add content, edit text and negotiate changes. At its best, this can be a highly dynamic and non-hierarchical way of structuring community and content, in that every-day non-technical users may participate in creating structure as well as content.

When I suggested to the organization that we use a wiki, my intention was that it would just be one way of interacting, along with emails, conference calls and web-conferences. These different types of interaction consisting of a mix of synchronous and asynchronous modes,

would be important for the rhythm of the community (Wenger, et al., 2002) and for supporting different learning styles amongst participants. In addition, since most participants were volunteers spread across time zones, I wanted to ensure that users had different ways of participating regardless of their day time jobs. I also had a vague idea that flexibility might be important for people with the disease even though I did not explore this premonition fully at the time.

My hope was that a wiki would offer an opportunity to have an active, flexible working space, where the features of the wiki enabled learning and collaboration and supported the development of relationships in the group towards a “communal mind”. Thus, in a sense, I saw the wiki as an opportunity to learn to work in new ways. I thought that introducing the wiki would facilitate the understanding of a new collaborative process-oriented way of working together, which would be more challenging to do in conference calls where perceptions and habits about how to participate were already developed. Based on my previous experience and my sense from the President and the Director of Education about the existing level of collaboration, I assumed that those habits were not very conducive to collaborative learning. At the same time, I admit, really *wanted* to explore what would happen if all members *experienced* technology in a new enabling way for communal learning. I thought I could better facilitate that experience through a wiki and live web conferences than through emails and conference calls.

### **Cultivating the Ground and Preparing the Soil**

Prior to our initial conference call, I sent the core group an email with a bit of background theory on CoPs in my own words, including a few thoughts on the advocacy group as a CoP and on their and my initial roles and involvement:

I include all four of you in this email is because I see you as the core of the community (of course you'll have to confirm whether you agree and/or would like others to be involved as core coordinators/leaders as well). Without your involvement and commitment in building and sustaining it, it will vanish before it produces much value to any of its members. I can assist and facilitate with my knowledge around technology, community building, collaboration and learning, but the community is yours - my knowledge about advocacy and [the disease] is minimal compared to yours - you will be able to know what is relevant and intriguing for its members and potential new members.

My suggestion for next steps is that the five of us start communicating about what we want for this community. What energizes you and potential members? What are the key problems and issues in advocacy that need focus? How will you explain the value to potential members? What is the plan for initial activities? (personal communication, August 1, 2008)

My intent was to give participants a chance to think about these concepts before our call. I was also very aware of how the fact that the project would take place online, could derail the conversation from what the community wanted to *do* together and instead come to focus on what technology could do. I therefore wrote.:

I have previously mentioned the online component of this project and I know that thinking about an online project causes some anxiety for most people. In addition, for you as the core group, you may wonder if everybody will have equal access online and the needed technical skills to participate on even terms. I therefore encourage you to think of this, not as an online project, a web project or something technical...Rather, first and foremost, we are **building a community of knowledge around a practice (advocacy)**. The fact that community members are not in the same location makes the community building more challenging and necessitates the use of various technologies (i.e. phone, email, wiki/Web site, Skype, Webex), however, community building, learning and knowledge creation remain our goals - not mastering of a great technical infrastructure. (personal communication, August 1, 2008)

The response was immediate and very positive from three of the four people. One of them promised to get in contact with the fourth person. I also got a small indication of what it would be like working with them and planning conference calls. While I had suggested to have the call “in the beginning of the month”, the meeting was instead scheduled to the last day of the month since “September is a busy month with (...) [important fundraising event for the organization] and other meetings” (D, personal communication, August 1, 2008). I understood they were busy, but still felt somewhat surprised that they would not have time for a single conference call during a whole month.

In preparation for the first conference call, I prepared myself by thinking about the importance of listening and making sure that we would be focusing on what was close to their agenda, needs and goals. This was challenging for my role as a researcher because I felt I had some set criteria to include in the project, such as timing (I wanted it to start now) and the fact that I wanted to research the facilitation of a “true” CoP rather than a loose network of knowledge exchange.

As a consequence, I prepared to ask questions specifically focusing on what they thought was possible to achieve over the next three months. I also used one of my previous online trainer tricks, drew an ear and wrote “LISTEN” with big letters on a piece of paper, which I would have in front of my eyes during the call.

Based on my previous, but limited interaction with the organization, I also tried to imagine what the four individuals’ roles would be. M had appeared very visionary and supportive, but I did not expect her to get deeply involved in the project. D, on the other

hand was already showing an active role in the response to my emails and seemed very curious about the concepts of community and knowledge sharing. I also noticed that she had several responsibilities other than advocacy within the organization and had a lot on her plate. A appeared as one of the most important persons to engage since he was the chair of the Advocacy Committee and had the disease himself. It therefore puzzled me that he seemed quieter and less opinionated than the rest of the group, but I think I attributed it to his worry about how everyone would deal with the technical aspect of the project. Finally, C had already demonstrated how she was looking for tasks close to the existing strategy and agenda for the Advocacy Committee. She was taking coordinator and leadership responsibilities and wanted to achieve concrete results on which to report.

### **Technology as Solution or Enabler?**

Even before the first conference call, the issue of the role of technology worried me. I realized that I had perhaps not been entirely clear that technology was not the purpose. It was only a tool. I felt I had started on the wrong foot presenting the project with too much focus on the online component. Had I already fallen into a “technology trap” myself by readily accepting “working and collaborating online” as the solution to the organization’s challenges of connecting all its stakeholders? And if so, how might I get out of the trap again?

During those days, I was actively participating in asynchronous discussions in an online workshop on CoPs facilitated by some of the CoP veterans, Etienne Wenger, Bronwyn Stuckey and John Smith.<sup>4</sup> The workshop was an excellent forum for me to reflect on my current work and to voice some of my concerns regarding the role of technology in launching and enabling a community of people to learn together amongst peers and practitioners interested in CoPs. I was especially struck by these comments by E. Wenger:

stewarding technology for community is not a matter of finding the best technology solution. It is a matter of enabling communities to work well. And integrating participation in communities in the way people already work is as important a criterion as the features of the technology. (E. Wenger, personal communication, September 25, 2008)

And later, as a reply to my question of whether a wiki itself might give the participants an opportunity to work together in new and more collaborative ways, different from their existing ways of working:

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<sup>4</sup> CPsquare Foundations Workshop, September - November 2008 (<http://cpsquare.org/edu/foundations>)

Building communities of practice is often caught in this kind of dilemma. On the one hand, we want to convey that it is nothing new, it is what people have always done; on the other hand we want to convey that it is a new way of working together, that it is really different from business as usual. Both are important and I think your technology dilemma also reflects that.

But what comes to mind as I read your post is that the question itself is putting technology first. My sense is that this is not a decision you should try to make yourself. Have you had a chance to talk with a good range of potential members? How do they react to the idea of building a community? What do they think about using technology? Do you have a core group working with you?

If you have enough people interested in trying new technologies, and as long as that group is representative of the entire membership, their leadership will likely carry everyone along. (E. Wenger, personal communication, September 26, 2008)

Spot on! Had I really had a good chance to talk with potential members and to listen to them? Probably not. The first conference call with the core group was coming up and I realized that we had a lot to talk about. Some central themes were already emerging around participation and the role and integration of technology to people's work (existing work or what they really wanted to do) and we had not even had a dialogue around the vision for the community or about people's roles. This was perhaps even considerably more than was possible for one call. With that in mind, I dialled into the conference call.

In many ways these initial reflections were important. As it turned out, my intuition, the nagging sensation had lead to some issues early in the process, which would keep appearing over the following months...

### **The First Call: Is There Excitement Here?**

One thing that clearly stands out for me, when I recall this conversation, is that I was excited because my little core group seemed excited. I started out talking a bit about my offer to them, my time, how my involvement would include technical assistance as well as community facilitation. On the technical side, I saw myself as a trainer, whereas my role in terms of building community would be much less directive and more facilitative and nurturing (Lippitt and Lippitt, 1986).

I also tried to be clear about the type of commitment I was asking from them. I wanted them to know the importance of modelling behaviour to the rest of the community by showing their presence online, sharing their own stories, challenges and concerns and asking deepening and inquiring questions. However, most of the conversation was focused on what was important to them right now and I made a point of giving each of

them time to talk about where their energy was and about what they really wanted to see happening over the coming three months.

C talked about the need to have a place for discussions, to post documents and to get feedback from the community. She saw the main challenges in the Advocacy Committee as the ability to connect, and to get engagement, time and commitment from everyone to “keep moving the advocacy strategy forward”. I noticed with some unease how she used language such as “be informed”, “post questions” and “streamline communication” (C, personal communication, September 1, 2008). To me, this way of speaking did not quite have the nuance of mutual learning, knowledge sharing and collaboration I had wished for. I was therefore happy when D took over and talked more about interactivity, co-editing and working on action items of immediate importance to people: “I see it as more than sharing information, more action oriented...that's how I can get excited”, she said (D, personal communication, September 1, 2008). A added that something concrete was important and that he would like to see the café as an “ongoing meeting”. He was particularly interested in having a meeting or discussion space to follow up with people and felt that having one place to refer everybody to would be very helpful.

We discussed how and when to involve others and what would be the role of the wiki in terms of the organization's face to the outside world. Since none of them had worked on a wiki before, they felt like they needed to see what it was before they could decide further. I encouraged them to involve key people whose ideas and energy they saw as important for the Online Advocacy Café early in the process. At the same time, we all recognized that the next step was for us to play around with the wiki and to find out what it really was - or could be - about.

As I inquired about each of their roles and commitment, the question of “how much time” came up. I answered it would vary; some people would perhaps visit the café once a week while others would spend considerable time there every day. The important thing was that visitors or participants to the café got the feeling that the café was active and that some people daily had shown their presence by edits, comments, questions etc.

My rationale was that such vibrancy was needed for the advocacy people to become a CoP and that such an environment would have people engaging in real dialogue (Brown & Isaacs, 2005) and collaboration. I was somewhat aware that this was not really based on an analysis of what the community needed, rather it was my more generic idea of what could constitute a really vibrant online CoP. Neither of the three people saw that kind of a commitment as too much, and I was happy when D commented

on the need to have “online baristas” in such an environment, since this informal café analogy gave me an indication of how they were starting to see the project.

The thing that really enabled excitement to build throughout the call, though, was the emphasis on this being real to them. Initial concerns about time commitment and technology seemed to evaporate and they joked about sipping online lattes. However, we never really had time to discuss what this “real” stuff would be (C announced after 45 minutes that she had to leave). Instead, pressed for time, I asked all of them to write down their thoughts on the purpose and the outcome of the café.

There was some concern about everybody having online access. Admittedly, I had trouble understanding this as a real problem given that we were all located in Canada and that we were not asking for high speed connections to be able to stream video or download heavy files. Nevertheless, I did my best to understand the problem. Did anybody not have computers and Internet connections? In the end, this did not seem like such a big issue anyway and I was happy that it did not take over our discussion. “I did not downplay the “technology fear”, but inquired further about it. I am happy that the concern seemed to evaporate and that the discussion became more focused on possibilities” (personal journal, September 30, 2008).

In hindsight, the concern was actually very real, although in a slightly different sense: “access” was more about the technical expertise and confidence to use computers as an everyday tool for this particular group of people of whom many suffered from a disease, generally were a generation older than myself and not used to experimenting a lot with new ways of working and using computers. My eagerness to move onto talking about content and process rather than technology had perhaps blindfolded me and made me incapable of seeing the real issues. I will elaborate more on this realization in Chapter Three of the thesis.

### **The Following Weeks: What Do We Want to Do Here?**

During the following weeks I realized that I would need to identify some collaborative learning activities for the core group as well as for additional participants. I hoped that such activities would create what I saw as a needed experience of the potential and excitement of learning together collaboratively. However, it almost seemed like finding activities that would change the way we worked together to a more collaborative approach became a goal in itself. These activities would also have to be closely tied to existing activities in advocacy in order to fulfil the need for it to be “real”,

which had been important to everybody during our first call. An upcoming federal election seemed to provide an obvious opportunity.

Wenger, et al. (2002) recommend starting to build a case and working on the intent of the community at this early stage. C and D both got back to me within a few days with some words on the purpose and outcome. While I was happy they had put some thought into it, I was also slightly disappointed:

I can't help but be a bit disappointed that they are thinking of this in terms of information exchange rather than collaborative knowledge creation and learning [...] Perhaps I should do some work with them on what's a community and what's a network? (personal journal, October 1, 2008)

In addition, I wanted them to have a dialogue with each other around the purpose and I therefore encouraged them to share emails they sent directly to me. But my sense was also that at that point, it was not much use discussing purpose and outcome further. Consequently, I largely ignored what I already saw as quite differing opinions on purpose amongst participants especially on the notion of whether we were trying to build a large information portal or whether we were fertilizing the ground for further community building and collaboration within the Advocacy Committee.

I personally saw a need to do some community building and collaborative activities to have an experience of the possibilities of working together. I thought about how they could share a personal story, a challenge or a question about advocacy, how we could use the wiki to brainstorm on what it takes to create an online café environment, and on what the coordinators' roles could be. And I used personal phone calls and emails behind the scenes, to ask them what they thought and if they would be willing to share this (Wenger, et al., 2002; Lai, et al., 2006; Tarmazi, et al., 2006). When the wiki was up, I posted the following questions and asked them to add their ideas:

What questions do we need to ask and what activities do we need to undertake in order to engage initial participants in the café work?

What are the essential questions for the people doing advocacy work? (Online Advocacy Café Wiki, personal communication, October 4, 2008)

Setting up the wiki was a learning experience for me as well. I had to experiment with what was possible technically, but the main challenge was to think about how to design it in a way that would be inviting, inspiring and not intimidating to people joining a wiki for the first time. I knew I would need to strike an important balance between a basic structure and a space that was not too "finished" to be edited by others (Farkas, 2007; Roberts, 2007).

I sought inspiration in other wikis, blogs and articles on wikis for communities. As I subsequently invited the core group to join, I was quite specific in what to do when they entered the wiki, such as “add your name to the advocacy community email list”, “play around in the Sandbox”, “try creating a new page with your name and something about you” etc. In addition, I emphasized experimenting, playing and having fun. I titled the invitation email “Online Advocacy Café - Time to play on the wiki site!!!” hoping that my intention to make it easy and the least intimidating as possible to edit and add content would work.

It was exciting to observe the first activity on the wiki. A did not enter the wiki, but C edited the page with the address list and D took on most of the tasks that I had laid out. In her edits, I was happy to see some concrete suggestions for activities. My hope was that once they (not me) suggested the activities, I would be able to help them find ways to collaborate around them. On the page “Activities and discussion ideas for our café”, D wrote: “who can meet on October 16th for a post-election follow up? Would 10:00 on the 16th work for everyone?” (Online Advocacy Café Wiki, personal communication, October 6, 2008).

Conscious that immediate response and encouragement would nurture the motivation and feeling of aliveness, I added the note below:

Yes, I can meet on the 16th. Great idea! Who do you want to invite? And how would you like the conversation to unfold? If we open up this call to our larger community, it could serve as a bit of a taste of what the advocacy café is about. It may be a good idea that we offer them something concrete, so they walk away and go "yummy...that tasted good...I want more" :-)

After which she wrote:

*I was just making this up! I am playing in the sandbox, so to speak; I wasn't really serious about a meeting; but it could happen; right now I am playing with the chatter and seeing how it works with the calendar of events. AND I am drinking a chai latte :-) just trying to get the feel of a café and all the different rooms!*

*Looking forward to our chat on the phone at 3:00....bye* (Online Advocacy Café Wiki, personal communication, October 6, 2008)

The call later that day focused a lot on the initial impressions of the wiki, such as how to make it easier for people to find out how to log in and contribute. Only C and D attended and I followed up with A by telephone the following day. I was worried about losing him and had all of a sudden started wondering whether the disease had anything to do with his “absence”, especially in email communication. However, when I talked to him, he appeared excited, interested and would “log on tomorrow”. Both D and C thought the wiki design could be a lot clearer and I encouraged them to change things around in a way they thought would work best.

Managing people's expectations in relation to the overall advocacy message and strategy was also a concern. C was worried about consistency in the messages from the national office and about how discussions on the wiki would impact this. We discussed how this would depend on the purpose of the wiki. Was it going to show the official “face” of the organization or something else? How would it differ from the Web site and the Intranet? How might the expectations change if the wiki was seen as a space for advocacy practitioners to share knowledge rather than a suggestion box for national office?

Conscious that the group had wished for the project to be very “real”, I also tried to focus the conversation on ideas for topics to work on, and I inquired about what was important and interesting to advocacy people at the moment. I was actually curious and wondered why they were not telling me much about it. What was exciting for this group? Besides, it seemed a bit futile to discuss how the wiki was to be furnished before we knew a bit more about how it would be used.

I remember this moment of dead silence, when I suggested that we complement the wiki activity with conference calls when involving more people, in order to get everybody on board using familiar modes of communication. I also thought that using different modes of communication might help create a good rhythm of activities in the community (Wenger, et al., 2002). I was puzzled by the silence. This was not a new suggestion. Was this too much to suggest? Were they worried about their personal time commitment?

The call did not provide a lot of answers to my questions. There were some general ideas around putting an existing survey on the wiki, doing something around an election follow-up (a federal election was approaching) and an idea to have “questions of the month” to get conversations started. But in general, I started to get the feeling that we just kept scratching the surface. Why was this? What if I had approached the facilitation of the project differently? How might we have started everything off differently in a way that would have enabled a deeper dialogue and more excitement? In addition, there was the emerging realization that these people were not used to the type of collaborative work I had envisioned, and that I was likely touching upon deeper cultural issues beyond the scope of my research.

I was not sure how I would be able to facilitate a deeper conversation at that point, and I therefore relied on the group’s decision that they were now comfortable with bringing in the rest of the Advocacy Committee to get their ideas and opinions. Perhaps this would spur some excitement and concrete projects. I crossed my fingers and kept reminding them of their own words to find essential issues to work on that would make it real, engaging and lead to actions.

## Engaging Participants: Stuck by Technology?

However, as the weeks passed, it became clearer and clearer to me that we needed to have some sense of common mission and task (i.e., Kimble & Hildreth, 2005; Trembley, 2005). The group had no compelling reason to spend time developing the Online Advocacy Café and consequently, they did not do it. While I realized that the project was not a priority, I found it odd that I was not able to focus them around some common tasks or projects that would get us going.

I also wanted to share those feelings with the group in an effort to encourage them to be honest with themselves about their commitment, but planning just a single conference call was a challenge and took several weeks of emailing back and forth. Sometimes, responding to an email would take days and I would occasionally get emails such as “I’ve been out and am just catching up on my emails” or “sorry Bettina - as you can tell, we’re all just swamped” as a response to my messages to them. D and C had logged into the wiki, but only D had really edited pages. Despite phone calls to A he had not even logged into the wiki yet and two weeks after our last call the rest of the committee had not been invited yet.

I felt time was ticking. I was worried about the project completely losing momentum; and in addition, I had a personal time limit for my involvement during which I had hoped to see considerable more action. I started to question whether I was too impatient, but could not escape the frustration of not even being able to ask what was going on: “What does the silence mean? It’s killing me” (personal journal, October 27, 2008). I knew it was important that I stay positive, but how?

I partly blamed my outsider role and felt incapacitated, as a couple of incidents had me realize that I really knew very little about what was going on in the daily work of the organization; and that I had none or very limited inroads to finding out:

Found out what they have been so busy doing. Turns out that Harper committed \$15 million to research in [...] diseases during the election campaign. They are now busy following up and ensuring that the promise is kept. I feel kind of odd that I did not know. I am really such and outsider. How do I get more in? (personal journal, October 27, 2008)

But the outsider role was not all. As I reflected on the process about midway through the three months, I started to open my eyes to the fact that they were likely all still terrified of the technology because they had never been on a wiki before. In fact, while I was stretching my mind to find ways to involve people through activities and conversations that mattered to the advocacy people, they still felt debilitated and stuck. L reflected later: “We did not understand the technology, so how could we say what we

wanted to do when you asked us about projects and activities? [...] We need training first” (A and L, debrief conversation, January 12, 2009).

L and A believed that lack of training was a big reason why only a few of the 10 invited committee members even responded to the invitation to join the Online Advocacy Café and why an important member from the core group such as A himself was silent for months (he also told me later that due to a move to the country-side, he had unexpectedly had a dial-up Internet connection and found it challenging to even access his email.) Ironically, I was so fixated on making sure that our project did not become “about the technology” that, for a while, I overlooked the need to focus on and provide technical training and talk about the tool.

Realizing this, I started to look for an opportunity to offer some specific training. I also became convinced that in order to refocus and find energy for the project, we needed to get into the same room – face-to-face. I had been resisting the latter conclusion, partly because I thought it was impossible, partly because I somehow wanted to “prove” that we did not need a face-to-face launch workshop.

Nevertheless, the following day, I called D, told her my thoughts and suggested that we do some training during a conference call right away and that we tried to get together in a small half-day workshop face-to-face:

Managed to get a hold of D on a call, ten minutes! (Pushing this is hard...) Well, she says (she is quick to say), she'll do some follow up calls. P.C How do you listen as a facilitator when people don't talk? (personal journal, October 27, 2008)

As apparent, I still had some questions about my facilitation. But I also noticed an opportunity, especially when D was quick to follow up right after our conversation. I was excited and started drafting agendas and exploring ideas in my notebook. There was so much to do – finally an opportunity! An additional call to M further seemed to spur some energy and all of a sudden four concrete ideas for activities had appeared on the wiki from D. She finished her wiki idea brainstorm with this note: “Okay, so this is really the last entry in the café tonight as I have enough café today. This is kinda fun....try it!!” (Online Advocacy Café Wiki, personal communication, October 29, 2008). I found this very encouraging, since she was now also actively taking the role of encouraging others.

### **The Power Brunch on the Wiki**

Despite D's follow up and ideas for actions, I was not terribly surprised when after a couple of days I had not really gotten any response to my inquiry about getting people

together in the same room for a training workshop. By now, I knew that D and C generally had a lot of other priorities, and I knew there was not much of a culture of getting people together – especially since most of them were mostly volunteers from out of town. Instead, I focused my energy on the “Power Brunch on the Wiki”, a conference call, set up as a training session that focused on becoming familiar and comfortable with the wiki and on the next steps for the Online Advocacy Café.

My intention was to model how working together at a distance, over a conference call or in other ways, could be fun, relaxing and productive at the same time. As an example, I framed the invitation and agenda in a light informal tone, playing on the metaphors of the online café:

Menu:

1. Welcome and check in (hang up your coat)
2. Familiarizing ourselves with the café, walk through it together, change it as we go (smell and taste the pancakes)
3. Brainstorm on next steps; look at suggestions from D and perhaps others... (the pot luck begins)
4. Decide on something small to start right away - focus on where our energy lies (caffeine momentum)

(personal communication, November 2, 2008, sent to D, M, C, A and two additional committee members who had expressed interest in joining, L and N)

Prior to the event, I noticed something happening:

I am preparing for the Power Brunch on the Wiki in 15 minutes. I am excited. Something is happening. Perhaps this is the heart beat and the rhythm needed...synchronous events. Or perhaps it is more like injections of energy to asynchronous work. It is certainly needed to engage people, it seems. They find reasons to contribute, they are prompted into the café...I notice how C and D have been busy editing right up to the event. And M and others have visited.  
(personal journal, November 4, 2008)

We spent about an hour together, mostly on the second point on the agenda, which was, in essence, training on how to use the wiki. I would ask each one of them to try out things as we went along. In that way they had time and opportunity to try contributing to the wiki “hands-on” with lots of encouragement and opportunities to ask questions. It was a bit of a challenge doing this over the phone, since I was not able to see what they had in front of them when they asked a question, but it was clearly better than nothing.

The Power Brunch became a turning point in the project for several reasons. It gave people some of the comfort and confidence of a training session and de-demonized

the technology. I had been very careful, making sure everyone got a chance to try things out and did not feel behind, different or incompetent during the call. But everyone entered, had had their fingers on the keyboard and experienced that they were able to edit text, add pages and comments. C later reflected that being “forced” to be on the wiki during the call motivated her personally: “When we first started talking, I admit, I wasn’t fully engaged. If I had not been forced to be on the wiki it would not have happened. It wasn’t on my “need-to-do list”. For her, the “personal contact with the technology” helped her to start “seeing how I could use it in my role” (C, debrief conversation, January, 27, 2009).

This experience of usefulness in action was in fact an experience of something real. It was further highlighted when everyone experienced that I created a “meeting notes page” on the wiki and asked C to take minutes - as we talked! Aside from figuring out what the wiki was all about, the advocacy people actually saw how a wiki could be immediately useful to their work. As I later followed up with everyone, I gave them the link to the minutes (rather than attaching them to the email) and encouraged them to edit or add to the minutes. Previously, I had sent this in emails after our conversations, but I realized that by doing this I was actually not modelling the use of the wiki in one of its most obvious ways very well. In hindsight, this was so obvious. Behind the scenes, I had started to seriously research and ask myself what a wiki was good for at all. This, in turn, enabled me to answer that very question to the participants and help them think about concrete ways to use the wiki.

As a result, I think C really saw an opportunity to use the wiki for her work with the Advocacy Committee. She started editing the wording on the front page and creating new folders, and she sent an email to the committee, explaining about the Online Advocacy café as “on-line tool that [can] be very helpful to our advocacy committee work”. The first part of the email read with bold red letters:

**Imagine a one-stop virtual meeting place and resource library for the national advocacy committee and the entire national advocacy network! Consider the convenience of a web site with the most current [...]advocacy updates and documents, questionnaires, and all of our committee notes and working documents. All of this is not only possible, but really really easy on [our] new Advocacy Café!** (C, personal communication, November 5, 2008)

Again, I noticed the tendency to position the café as a (hierarchically structured) Web site (managed by national office) for information exchange in a loose network rather than an informal collaborative working space with focus on developing a practice and

working together on pertinent challenges. This worried me because it had never been my intention to create just the technical infrastructure for a loose network of people. I wanted to facilitate community, deep learning and sharing. On the other hand, especially at this point, I was also happy that C took some ownership and I realized that without an in-depth analysis, workshop or dialogue around the needs for these people, I was not in a position to say what would be the right thing for them to work on right now. It might have been that what they needed was indeed a kind of information portal and not a CoP.

As such, I was becoming more cautious about my own line of thinking and increasingly of the appropriateness of a very directive approach to designing a CoP:

I keep feeling bad because purpose and vision are not clear and have not had appropriate attention. But is this just my linear thinking? Could it be that some things like this emerge and grow organically, messy and slow on the surface? Could it be that it cannot be dealt with in a problem-solving manner and with a clearly defined vision to begin with? (personal journal, November 10, 2008)

What I also did not realize at first was that this was one of those incremental steps on the bumpy road of learning. It may have looked small to me, but indeed it was a major step for this group in their coming to an understanding of how they could work with this new tool.

Things were indeed growing. But it was not without some frustration. The initial lack of analysis or opportunity to come to agreement amongst the core group on the needs, purpose and target group was creating some frustration under the surface and making it difficult to come to agreement on activities on which to work. Was the Online Advocacy Café going to be a small working space for the Advocacy Committee or would it potentially be open to the wide advocacy network of 300+ volunteers as a “virtual meeting space”? In the discussion on next steps during the Power Brunch, I sensed how nobody was really willing to pick up on D’s suggestions for initial activities. In a personal follow-up she said:

I think we need more clarity on the café; while it holds great potential, I am a firm believer in taking small steps and showing that it works before we go to a larger audience. What is doable, given everyone's workload and timelines? (D, personal communication, November 4, 2008)

Yes, what was doable? I was reluctant to take on a more directive leadership role and decide for them. We were still trying to involve the rest of the Advocacy Committee in order to get their ideas for the café. Personally, I hoped that involving them would make it clearer where the energy and the needs for the advocacy people really were.

But we were not getting any response from the committee members. D thought they were overwhelmed and uncomfortable with the idea of the wiki; however, she also saw it as an issue that they were all volunteers, many with day-time jobs and several other priorities. However, despite her disappointment about the low participation, I noticed that she was hesitant to take up my suggestion that she even mention the café during informal coffee break conversations in an upcoming annual meeting, where some of the Advocacy Committee members would be present. She said “Oh no, there is so much else going on there!” (D, personal communication, November, 10, 2008). It was very hard for me not to interpret such comments as though this project was seen as on the periphery of everything else going on. The advocacy people liked the idea, but were not able to connect it to everything else going on. At this point, I had perhaps not yet started fully appreciating that the idea might not be connected and had not appropriately been so from the beginning...

One conclusion from the Power Brunch had been that more of these kinds of training sessions and opportunities were needed in order to give the rest of the Advocacy Committee a chance to participate. Consequently, I suggested several possible training dates over the following three weeks. The agreement was that C would try to encourage the rest of the Advocacy Committee members to join these events. But despite emails and phone calls, no-one signed up:

I have made several attempts to connect with the committee but I'm not getting any response on the café. I think the best plan is for me to schedule a conference call meeting for the entire committee – which will not happen by Monday. (C, personal communication, November 18, 2008)

### **Starting to Listen: L's Story**

As we approached the third month of the project, my personal excitement had taken a big dive. I had continuously tried to stay positive, but I now seriously began to question the value of the project, wondering whether “mistakes” made were at all reversible, and whether this group was at all interested in doing anything differently from what they were used to. I was coming from the outside and I was beginning to see that I did not understand who they were. I had neither taken, nor been given the opportunity to find out. How could I plant seeds, nourish, cultivate in such scarce soil, sun-light and water?

One seed of encouragement came from the Advocacy Committee member, L. She did not know much about the technology, but had an amazing energy to give it a try. She participated in the Power Brunch on the Wiki around which I had some email

correspondence with her. L suffered from the disease and was worried that she would slow things down for others when she hit the wrong keys on the key board and felt she needed to correct her own sentences afterwards. Seeing the difference in her emails from when she decided to correct or not correct the sentences before sending them to me, I experienced for the first time some of the complications of the disease and realized how important it was to take this into account in the Online Advocacy Café. I therefore assured her not to worry about typos and about holding up the process and wrote:

I am really glad you let me know about how challenging it can be for you to type - and I'm impressed that you are still typing all these emails and engaging in the café. I think it is actually an important point for us to consider in general, since we will no doubt want to invite and involve several other people in the same situation as you.

And I really don't think anybody has any problem at all reading what you are typing. Missing vowels, etc. do not matter. Please don't spend all your time correcting. We are not trying to create something that is going to look perfect; we are just trying to communicate. (Personal communication to L, November 3, 2008)

Consequently, during the Power Brunch, L was very active and I got the sense that we had established a nice personal connection. She continued to enter the Online Advocacy Café afterwards and during a personal trip to Toronto, she asked to meet me for some training face-to-face.

Meeting her was a very personally touching experience, because of her honesty, drive and courage. She was an immaculately dressed woman, a grandma, did not look much older than 50, and had the disease. The meeting became an example to me of how the notion of training was so much more nuanced and complex in our specific case. As we sat down and took the time to walk through the wiki together and discuss the idea, she felt encouraged to share her personal story on a page that I had created for personal stories on the wiki:

This is a wprk in prograss. aad may change every day, as life does.

Th e irst thng i want t ell you i that redaing tismay be a callenge (it is even fr me!) My coordinTION IS FLing me and consquently my fingers do not LWys hit the keys THt I intend them to. It is frstaring for me as I am sur eit may be for you. owever, I regaad this sac a l pace that I ca e myself and you will CEPT ME THE Wy I AM NOW . (Online Advocacy Café wiki, personal communication, November 24, 2008)

As she asked me to read this, I felt humble and was touched to tears. She had never written this down before! The wiki had been a tool, but the comfort and trust that had enabled her to write was a seed of the relationship between the two of us and of the

comfort and trust facilitated. The meeting with L gave me a much better sense of the advocacy people and I think I really started to listen at a new level. This was not just any group of corporate workers trying to become efficient about a work task (something I was more use to). These people lived with an incurable disease, which impacted every moment of their lives. It affected, their ability to get out of bed in the morning, to perform basic tasks, to communicate, work and function in society. Advocating to find a cure and to fight the disease was not just an interesting hobby, their lives depended on it.

And so it happened that I learned much more about the group of people I was trying to connect with towards the end of the project. I learned who they were and how they worked. Not the least because I started asking the questions: Who are you? What are you like as a group? How do you usually work together? What energizes you? What are your challenges?

I learned that most people were volunteers and had daytime jobs elsewhere. Most of them were over 50, many lived in rural areas, and many only had a dial-up Internet connection, were not online every day and usually asked for things to be sent to them in print. During bi-monthly conference calls, only a few people spoke and apart from one annual strategy meeting there was no social aspect to calls. The preferred method of communication was email and many people did not know each others' names and could not even mention who was on the Advocacy Committee.

All of them either had the disease themselves or one of their family members had it. The disease played out very differently amongst individuals, but typical challenges were motor skills (which were essential for typing) and occasional difficulty focusing, multitasking and retaining information. What this meant was that this particular group had unique challenges with technologies, which were not accounted for in the general discourse on online participation. Due to the disease, their learning curves were very different, from not only non-volunteer corporate groups or younger segments of the population, but also from other volunteer committees not used to working and collaborating using other tools than email.

What struck me was that I had heard some of the things before, but without really HEARING. I had significantly underestimated the importance of *who* they were, *what* their technical comfort levels were and *how* they were used to working. In light of the answers to the *who*, *what* and *how*, many of the challenges over the past months started to make sense.

## Finishing up, Reflecting and Looking Forward

During the last few weeks of the project, I saw myself sitting on the sideline, available to help, but really just observing what was happening. From my view point, it was not much. But this was just my view. Although I was not being asked for help, C was now actively adding minutes from committee meetings to the wiki and putting the Online Advocacy Café on the agenda for a regional and a national meeting. One regional committee in particular seemed interested in learning more. I would get a couple of emails from people asking how they could get access to the wiki (they had already been given access) and I gathered that various advocacy people across the country were at least starting to have some awareness of the project, although ironically this was happening as I got ready to leave.

It occurred to me that this was the way communication normally worked in the organization and that it was not within my scope to change that. Items of importance would go on the agenda for a bi-monthly conference call, and even after that, it would take time for new ideas to seep through the cracks and become part of a discussion. Perhaps this was all part of my learning process as well as their learning process...

But how did L, A, C, M and D see the project? Did they have similar questions to mine? Did they recognize my experiences? A couple of weeks after the project had ended for my part, I asked them to join me for some reflections on the process. I asked them to describe their own involvement, the purpose and the process in general. I inquired about unanswered questions during the process, situations that motivated them and those that did not. We talked about issues they worked on and what they were usually like as a group.

The phone calls were more like conversations than interviews, as such. I learned a lot. Curiously enough, what I now learned did not appear so much directly connected to my role as online facilitator for nourishing the ground and assisting a sprouting online CoP. Rather, I learned about the common challenge in volunteer based organizations to balance staff responsibilities with volunteer responsibilities and how both sides often wait or hope for the other part to take the lead. I learned that when coming together, this particular group of people was used to strong direction, deadlines and clarity, and that they were not that familiar with more dynamic or shared approaches to leadership. I learned that early strategic plans might have been a discussion tool to surface some of the critical success factors for this group, such as the need to meet face-to-face to start new initiatives. And, I learned about the individual participants.

All this had more to do with getting to know my specific group or community of people and their context. But as a facilitator, this was perhaps one of the most important and challenging things to pay attention to. Thus, it would be incorrect for me to draw any general conclusions such as “online facilitators always need to provide strong direction and strategic plans in volunteer based organizations”. Rather, I realized that if there was any principle that stood out, it was the importance of knowing and paying precise and honest attention to the people and their particular context. It was about me knowing them. But it was perhaps also about me helping them know themselves, holding up a mirror and assisting them in making decisions based on what was “real” for them when using technology.

A couple of comments from A and L stood out for me when I inquired about what could have been done earlier. They were forward-looking, but also clear about the lessons: “We should have had a hands-on training workshop from the beginning”, “We could have had a conversation like this”, they said. They were looking for a purpose. The latter comment, combined with my own reflections demands the question: Why did we not have those types of conversations in the beginning?

This was precisely the question that had I feared most, because it made me feel that I should have known to facilitate “conversations like this” in the beginning. Yet, at this point, I was also starting to realize another important thing. Perhaps everyone had actually learned something useful. Perhaps we had not been ready for “a conversation like this” earlier on. Perhaps the process was part of our discovery. Perhaps the experience with the Online Advocacy Café had precisely facilitated that readiness.

I started to see that the learning was not all mine. The participants learned a lot too. It was interesting for me that they all seemed very keen on continuing the Online Advocacy Café. They asked specific questions about what it would require of them. They all emphasised how they liked the idea of the café. They also appreciated the process as useful for them in order to understand a wiki and in starting to see what would be valuable for the advocacy work within the organization: “We’re now in a better position. We’re going to present this as: here is our objective, here is the potential [...] we could have been more strategic, but now we understand the technology...it's been valuable” (C, debrief conversation, January 27, 2009).

All the people who had been part of the Online Advocacy Café invited me to join them for an hour during their upcoming annual face-to-face meeting (the only day they met face-to-face every year) to demonstrate the wiki and do some more hands-on training. Honoured, I accepted the invitation and overcame my own reluctance to

educate, present and demonstrate. I knew that an hour would not enable enough conversation and experience of where they wanted to go. We would not be able to involve everybody in a deeper experience and discovery. At the same time, I realized that a door had been opened. Trust had been built.

The opportunity to reflect on the process also enabled participants to become aware of and identify more specific needs of the group. For example L, D and A all pointed to the need to engage in concrete work and specific projects, and A and L mentioned the importance of hands-on training right away. Most significantly, as I talked to C in preparation for my input to the one-day annual advocacy meeting, she was persistent in pointing out how retaining information might be a challenge for the group due to the disease. Consequently, she suggested that I create a simple one page take-home handout with a step by step explanation of how to log into the wiki. To me this seemed like such an obviously great idea, that I was wondering why it had not been mentioned or suggested before. In a sense, it epitomized my experience of how it took time for me as well as for participants to discover or act in accordance with “the obvious” or what was real. At the same time, I also knew that this was probably one of those big white elephants wandering around in the organization...Talking about the need to do things differently because of the disease, was never something I experienced as easy for anyone in the organization.

During the debrief conversations and as I started looking back at the process, I started to see that this was neither the end, nor should I or anybody else be talking about “failures”. In addition, while my energy for the project had decreased over time, the participants’ energy was still there, if not more so now, than before. I had been immersed in the project, but I had lacked the sense that I was participating in something that was of value to the participants as well as to myself. Now, looking back at my original intent and talking to people, a different picture emerged. Something had happened. Seeds had been sown. Not a lot was visible, yet something had sprouted.

None of this had happened as I had anticipated, which may explain my frustration at times during the project, but we had all learned and explored. And there was energy when looking to the future.

## Chapter Three: Discovery

What happened to the online tablecloths in the Story of the Online Advocacy Café? What were the experiences of aliveness and atmosphere? Did I, as facilitator, learn how and when to set the online tables and enable processes of learning and collaboration online?

As I gained experience with the Online Advocacy Café, other questions seemed to emerge and I got increasingly involved with the organization and its people. I started wondering, not so much about the atmosphere online, but rather about what I as a facilitator might do to plant seeds of interest, which would allow us to come together around what mattered to people. In other words, I was taking a step back from the process of learning and community building online, realizing that something needed to happen before the bustling café atmosphere online could enable everyone to engage with each other at an even deeper level.

Chapter Three, Discovery, elaborates on this experience and on how the emerging understanding of my own assumptions and role as an online facilitator and reflective practitioner became critical to my inquiry. My reflection on practice, supported by the emerging literature, enabled me to shift attention again from *doing* to *being* and to start seeing that perhaps the issue of creating space online was less a matter of concrete, planned activities, than a state of mind, an art of presence, listening and of letting go of control.

### A Journey Towards “Realness”

*Starting with People and Context: How May Virtual Become Real?*

“We want this to be concrete. It has to be real!” The message during that first conference call with the small core group seemed clear. I could not have agreed more. Being *real* resonated with my thoughts about the importance of a people-centred approach starting from the heart and from what mattered to people. Consequently, I reiterated their words and encouraged them to bring their *real* questions and activities into our online wiki world. But what was behind this notion of *real*? What mattered and was *real* to them? As the project evolved, it became clear that the Online Advocacy Café was also a process of collective and individual discovery for the participants. They were finding out what was real to them when working online.

Looking back at the process, the notion of *realness* seems to make its appearance everywhere in my story, my experiences and my sprouting seeds of understandings. Realness seemed to capture something about the aliveness around the online café tables that I was searching for. Although the conversations might be enabled by online technologies, I was looking for sentiments of *real* as opposed to *unreal* or *virtual* experiences. In addition, the

notion of real spoke to the challenge of translating concepts from Senge's (1996) learning organization into practical real life examples and of leaders, facilitators and consultants being real, reflective and authentic, modelling behaviour and acting as stewards and facilitators rather than pretending to be heroic experts.

Thus, I have slowly come closer to an understanding of the implications for me as a facilitator of something that was *real* to people. They needed a process which supported their concrete projects and activities, now and in the near future. Engaging with each other in conversations on the wiki was not a natural thing for them to do and it was challenging for them to see a connection to their current activities. In that sense, it was *unreal*.

One of the experienced online facilitators and practitioners, Nancy White, whom I had come across in my literature search online, wrote extensively about care and nurturing when facilitating online group interaction. One of the key themes for her appeared to be the emphasis on knowing your online group and discovering the intent behind the purpose it hopes to achieve. The context and the strategic intent was crucial (White, 2002). With hindsight I can see that, for good reasons, the advocacy people were not that motivated or committed to my somewhat abstract idea(s) of collaboration, community building and online café conversations. We were all just finding out what was real and our collective intent was not clear.

Despite this initial and progressively increasing awareness of my need to find out what was real to the advocacy people, I also quickly learned that discovering what mattered and what was real to this specific group was easier said than done. To my own surprise, I realized about half way through the process that, for several reasons, I did not know the people I was trying to work with. It was not until I was able to step away from the process and start writing the story that I began to develop a deeper appreciation of the challenges and of what had been hindering my understanding of who people were and what they wanted to do. As a researcher-practitioner this is interesting for me to note. The multiple understandings or layers of learning do not always reveal themselves until later or without conscious reflection on practice (i.e., Bateson, 1994).

As well, I realized that the Online Advocacy Café had not only been a discovery process for me, but also for participants. I think that everybody learned something useful during the process. However, rather than wondering about reasons and solutions for low participation and engagement, my energy could perhaps have been used more constructively, had I listened more carefully to what was going on for people earlier in the process. At the same time, I might have realized that they were also on a path of discovery.

Knowing people and context before thinking about any tool selection, tasks, and strategy or process design thus became one of the first and clearest learnings from the Online

Advocacy Café. “NEVER adopt technology just because you can”, write White and Shirley (2007, p. 552) as they advocate for how context and purpose drives everything. In hindsight, as an OD practitioner, this seems like an obvious “truth” or indeed a corner stone of OD work (Block, 2001; Cady, 2007; Dickens & Watkins, 1999; Lippitt, 1982), but the point was that my challenge rested precisely in translating that theory into practical lived experience.

### *Questioning My Intent and Staying Open – With Intent*

The process allowed me to see how I might have hindered some of the common discovery, collaboration and learning I wished for, exactly because I, largely despite my intentions, had already picked out technology and collective purpose without an in-depth or prior understanding of where people were and what they wanted to do. Moreover, that purpose was not totally clear to everyone else and was not translated into a language that made sense in the advocacy group’s context.

Although I felt that purpose had been clear and that I was always trying to involve people, I realized that the people-centred approach that I was looking for started long before the process of online learning and collaboration or before any selection of technology. It started by getting to know people and by an awareness of my personal agenda. Most importantly, it started by a realization that my agenda was not necessarily shared by everyone else. I needed to suspend my own assumptions of the one recipe for “good” online learning, collaboration and work in the process that Bohm calls holding up assumptions “as it were, hanging front of you, constantly accessible to questioning and observation” as quoted in Senge (1996, p. 226).

In fact, on reflection I see that during much of my involvement, I appeared to be stumbling along as an outsider, without an in-depth understanding of the group I wanted to work with and without a shared purpose. I was aware that the knowledge and wisdom was already present within people, within the system they were part of (Holman, et al., 2007; Brown & Isaacs, 2005), but I felt unable to find useful ways to facilitate and make that knowledge visible to the system itself. I gradually realized that even when I asked the advocacy people what they wanted to do, I had already set the scene, picked the technology and was pushing my own ideas of collaboration online, rather than discovering what it would feel like for them.

This was paradoxical, since it was completely against my espoused values of how I wanted to work with people. In fact, it was closer to a more conventional top down management approach of “change management” (i.e., Kotter, 1996), where a facilitator or consultant may be expected to use his or her expert knowledge to diagnose the problems and prescribe the needed solutions, rather than discovery with people. It was also dangerously close to a more technology-centred approach where technology comes first, almost as a solution to a

“problem”, and “getting people involved” as a second thought. It was even more ironic that I was not unaware of this disconnect between values and action, intent and experience, espoused versus theories in use (Argyris, 1994). Yet in practice, I often felt unable to act...

As such, a new insight started to emerge for me as a facilitator and researcher. My perception of my own role was evolving. A process of online facilitation, which put people first and was real by focusing on what mattered to people also required me as a facilitator to be real and honestly reflect on my own actions and assumptions about what people needed. In order to be a host of something “real” I needed to be real by suspending my own assumptions, letting go of my preconceived agenda and starting to inquire about and listen to their reality. I increasingly saw that this was truly how my espoused OD values would need to play out in practice. If I wanted to model behaviour, I needed to pay attention to espoused theories versus theories in use (Argyris & Schön, 1978; Argyris, 1994).

At the same time, the action research process enabled me to pay attention to whether my behaviours were also experienced by others as intended (which was not always the case). I saw how quality of intention only appeared useful when I kept asking how behaviours were received and was able to adjust accordingly.

As the process evolved, I kept struggling with the concepts of individual (my) purpose and intent and the collective purpose and intent. Was it a neat balancing act, complicated by my double role as a facilitator-practitioner and researcher? How might I stay purposeful, yet open to change?

It helped me to think about my research process, which unlike most positivist or quantitative research, had no fixed variables. My purpose was to carry out a piece of practitioner research on facilitation of aliveness and energy in online learning and collaboration. I wanted to set the online café tables. I had several assumptions about what that would look like (which distracted me along the way) such as the fact that I became focused on building a CoP. But my larger intention in carrying out the purpose was clear. I wanted to weave connections and host the space for collaborative exploration in a way which allowed people to find their own voices online and use technology as a useful tool. Remaining focused on this larger intention allowed me to widen my perspective.

## **Knowing People and Context: Characteristics of the Advocacy Group**

### *Discovery Through Questions*

So what did I discover about myself and the advocacy people? And what were some of the factors that complicated this discovery? My early notes regarding the people in the advocacy group are worth mentioning again:

The advocacy people seem to be a group of tech savvy keepers who are very passionate about having things happen. They are volunteers, but very committed. Most of them have [the disease] themselves. (personal journal, October 27, 2007)

In a sense these notes told me a lot about who the group was, I just did not know yet what was behind any of the words. In fact, they did not describe any behaviours, rather they were generalizations based on behaviours engrained in the culture of the organization. In what ways were they passionate about having things happen? What were particular examples of the way they usually worked together? What did they do that made the President and the Director of Education consider them tech-savvy? What role would it play that they were volunteers? How did the disease influence the way they worked together, saw themselves and related to the world? What were their dreams, hopes and aspirations as individuals and as a group? Such questions were calling for more specific high quality information.

Although, it had a deep impact on me to personally experience answers to some of the questions during the process, more initial inquiry might also have enabled me to know and support the group better. Asking these questions initially, as well as throughout the process, through a more conscious practice of reflection in and on action (Schön, 1983), might have helped me to pay attention more acutely during the process.

Looking back now has indeed opened my eyes to several “clues” that I missed in the first place, such as the fact that C described the main challenges in the group as getting engagement, time and commitment from everyone. This was really my first indication that the project would be about a lot more than engaging people online. If engagement and commitment already were considered challenges, this was not likely to be less challenging just because we were working online! However, at the time, I do not think I saw it so clearly. I still hoped that something new and exciting like the Online Advocacy Café would be the miracle cure. Yet, if engagement and commitment without new technologies was a challenge, it would likely have been good to be aware that engagement and commitment in a new mode of learning and collaboration was not exactly going to be easy. And most importantly, that technology would not be a solution to this challenge, although I was tempted to think so.

As well, by asking specific questions that prompted reflection along the way, I would aid the group's own discovery process, since common behaviours, language and assumptions were likely to be very engrained, undiscussed or even unnoticed on a daily basis. I saw examples of this when I had more informal one-on-one phone conversations with some of the people, and asked them to describe what they saw was happening. They too, were in a discovery process of what mattered and what worked well or not so well for them. They might not have been able to provide answers to all questions from the beginning.

### *Volunteer Values, Commitment and Motivation*

As a national charity, the organization relied largely on volunteers for everything from administrative roles, to fundraising, local support group facilitation, advocacy and committee work. The Advocacy Committee as well, consisted of mostly volunteers. What this meant was that although people were very passionate about the advocacy work and the organization's mission (indeed a characteristic for non-profit organizations), their time and work commitment to the committee varied. In addition, participation in various projects could not be mandated by leadership, such as might have been the case in the corporate world. While I cherished this fact and wanted participation in my project to be completely voluntary, it also meant that the commitment from the President and the Director of Education to work with me was precisely that and no more. They were not able to commit on behalf of any of the individuals. The most they were able to do, was to support the idea and model their own participation.

During the project, I never doubted that I had the support of the people in the core group. In fact, most of them repeatedly told me that they thought the Online Advocacy Café was an excellent idea. I also had indications from additional committee members regionally and nationally that they appreciated the project, such as when a regional member left a comment on the wiki and thanked me for the initiative or when others emailed me and indicated their interest.

Yet, one of the reasons that this support and interest failed to manifest into actions was perhaps that I did not thoroughly appreciate what it meant to gain the interest and commitment of volunteer members. Indeed, one of the most common themes in the literature on non-profits and volunteers is the challenge of attracting, managing, motivating, and retaining volunteers (Bugg & Dalhoff, 2006; Netting, 2007; Steedman & Rabinowicz, 2006; Zarinpoush & Hall, 2007). Did I really recognize how important it was to get support from the volunteer members – or even for volunteers to be part of creating what we were trying to support? Did I really see how commitment had to go deeper than verbal support and interest and be connected to something profoundly important and practical to each individual?

Towards the end of the process, I started to see that there is a big difference between thinking that something is “a good idea” to actually investing personal time, often outside one’s full-time paid job. This shift would require extra attention to a process of building a common experience of discovery of value and to be able to express that value to each other. At the same time, as a facilitator, I would have to help the community express that value and make it visible even from the beginning when people decided to join (Wenger, et al., 2002). The better I understood the dynamics of the group and how they usually worked, the better I would be able to help them discover and express the value of joining the Online Advocacy Café.

### *Culture and Dynamics*

The group was a mix of volunteers and staff members. During the debrief conversation with C, she had reflected on this dynamic as a leadership continuum where everyone always asks who will lead and prefers to push leadership to the other end, that is, away from themselves. In general, she saw staff looking for volunteers to drive projects and volunteers looking for project leadership from the national office. Consequently, she expressed the wish for volunteers to have taken a bigger leadership role in the process, while she also saw that “they [volunteers] look at us [staff] to pave the way”. In practice though, as I observed the email communication, the tone and annual meeting, I got the impression that this group was used to strong directive leadership from staff.

I use the term “group” here, but it is also worth noting that the people in the national Advocacy Committee were a rather loosely defined group. Some people knew each other very well, while others barely knew the names of everybody. Given that trust and relationship building is a crucial part of group, team and community building and work (i.e., Kimble, Li, & Barlow, 2000; Lai, et al., 2006; Wenger, et al., 2002), this had implications for how easy or challenging it would be for people to engage in a new type of work and discovery together. Certainly, I got the sense after working with the group, that they were not used to solving conflicts together or to any kind of collective discovery of meaning. On the contrary, when two people voiced some disagreement on purpose, they had trouble listening to each other and exploring or inquiring about each other's point of view. Realizing some tension, additional members were reluctant to take a stance either way. As I later learned, this reluctance was part of the established culture, as few people actually spoke during the bi-monthly conference calls and not everybody knew each other.

The type of collaborative work I envisioned included a sense of trust, the ability to inquire, listen and build on ideas of others. It was therefore worth paying attention to what might be existing deeply entrenched personal styles, patterns and culture. But I could not assume that people were motivated to try to change these patterns overnight by all of a sudden relating to each other in different ways than they were use to. This did not mean that things could not happen in a different way. It just meant that the usual way of working was the expectation and that people might not be prepared for how to react to anything different.

### *The Disease and the White Elephant*

An important part of the culture and what drove people was also the role of the disease itself. It was deeply interlinked with who the group was, since the disease was the common denominator for this organization and the motivation for people to come to do advocacy work in

the first place. Most people either had the disease themselves or had close family members with the disease. As I learned towards the middle and the end of my involvement, typing, multitasking or information retention skills could be added challenges of the disease and a different type of training was needed. The curious part about the disease was that it appeared to be the white elephant in the room. It was one of the most obvious, taken for granted characteristics of the organization, but during my conversations with people, it was always unaddressed and assumed knowledge.

I did not fully comprehend the role of this white elephant in the beginning. In addition, I hesitated to ask questions for fear of hurting anybody. I remember briefly studying a brochure about the disease given to me during the first meeting, but apart from that, I did not bring the role of the disease into the discussion of our work until later. When the elephant finally became visible to me and became part of the discussion, it was because I had shown patience, trust and support, as in the situation with L, or when I was honest about my own lack of knowledge about the disease and asked for help to understand, such as when I prepared for the presentation at the annual meeting. On one hand, I could perhaps have looked out more for the elephant in the beginning. On the other hand, I needed to earn the trust and become somewhat of an insider, in order to be let in on the knowledge.

### *Familiarity with Tools*

Since my research centred on the question of online facilitation and collaboration, an obvious question to explore was how familiar people were with using online tools, amongst each other and in their own work and personal lives (Wenger, et al., 2008). To understand this in-depth, I would need to explore everything from actual computer skills, to tolerance for new technology, time availability and bandwidth connection.

Wenger, et al. (2008) write: “little things like an extra login, URL, or tool can really affect participation” (p.3). This was indeed true in our case. As the process went along and we had invited additional committee members without much success, I would get an email now and then from someone asking me “how to login”. I always responded promptly with an email and followed up after a few days, but in truth, I was surprised to be asked this question, since everyone in my opinion had received several emails describing how to access and log into the wiki. As well, I really did not think it was such a big science! However, in hindsight, these requests told me a lot of things about the group. For one, they were not use to working online other than perhaps using emails. Secondly, they were perhaps afraid to ask or felt overwhelmed by the need to figure out what a wiki was.

As this example illustrates, a more careful understanding of this specific group of people's familiarity with online tools, would have allowed me to give more care and attention to what tools to recommend for our work and to how to support the group in using them. People were used to face-to-face interaction, phone calls and emails and the role of the presence of the disease was likely to significantly influence the confidence and ability of people to try new things online. Instead, I assumed that "tech-savvy" meant a green light to jump into the world of social media with a wiki. Yet, upon reflection, I can see that this is a stretch, since the basic principle of a wiki, namely that you post your words directly "on the Internet" and edit everyone's else's work, could easily feel intimidating to many and goes against much of what generations born before the mid to late 1980s are used to.

### **Online Facilitation Inside-Out: My Role in Understanding People and Context**

#### *Culture and Outsider Challenges*

Culture or group dynamics is almost always different than it appears at first. Tacit knowledge, unspoken rules and white elephants may often be a common part of the culture in most organizations. I was not part of the organization and was an outsider or a newcomer who needed time to learn and understand the culture. I realize that I may have thought or hoped that this new online process would provide us with a clean plate, but it became obvious that this was not the case. As White & Shirley (2007) note: "Online Environments reflect and amplify what is already present in a group, both positive and negative. If groups are open to change, an Online Environment accelerates it by increasing the density of connections and flow of information/conversation among people" (p. 554). Although working online might accelerate change processes, as I will also elaborate on in the section "Technology as Catalyst for Change?", people and context were who they were and working online was not an automatic and magical instrument for change.

While I was involved with the advocacy people and learned to listen to their reality, the picture I had of the advocacy group changed significantly. First, the role of the existing culture and context became clear. Secondly, my original image of the advocacy people as a group of "tech savvy and committed keepers" became much more nuanced once I started seeing it relative to the organization as a whole and to the fact that many people were likely seriously affected by the disease. This was not a reality I could have learned about in one initial meeting with the president and the director of education. Yes, I could have listened more and asked better questions, but I could not have understood how they usually worked and what was usually spoken about without spending more time with people and without inquiring more deeply over time.

As outside facilitators or researchers, it is often necessary to become somewhat of an insider, or at least partnering with an “insider”, before we start understanding the culture. At the same time, with skill and practice, our outsider eyes and presumed lack of knowledge of the cultural codes may enable us to ask questions, which “insiders” may be prevented from asking (Block, 2000). It was important for me to realize that like any relationship, inquiry and deep listening helps in getting to know each other, but one rarely really understand another person after a few encounters. For some, it takes years.

Why did I make my own assumptions rather than inquiring deeper into the organizational culture initially? Why did I not pay more attention to the importance of process and time in getting to know people? Why did I assume that the importance of who people were or the impact of organizational culture would be any different when working online than it was offline? Certainly, it was not a conscious decision. However, thinking back, I remember being keen to get started and being happy about the opening to work with the organization. For me getting started involved doing something online right away. I had positioned myself as the “online or technical expert” and perhaps also did not want to appear too suspicious or to display my lack of knowledge about the organization, the disease and advocacy work in general. Now, realizing this, indeed helps me learn about myself as a reflective practitioner and facilitator. I might have had the notion that I should know more than I did. The feeling of displaying my “lack of knowledge” was scary, yet, in hindsight, it also represented an opportunity for learning as a researcher.

### *Cultivating a Case for Value: Moving Towards the Inside*

Recognizing who people were and acting on these challenges was highly relevant for my role as a facilitator. Farmer and Fedor (1999) discuss how volunteer engagement is a psychological contract between the individual and the organization (see also Netting, 2007). They argue that “the level of support the volunteer believes he or she is receiving from the organization, are especially important tools that can both increase participation in various events and reduce withdrawal or turnover intentions” (p. 349). Indeed, it appears that non-profit organizations and volunteer workers are often characterized as very value-driven. This helps to explain why the somewhat loose definition of roles and goals during our process was likely to discourage people from contributing or committing. It also puts C’s comments on the challenges of commitment and the tension between staff and volunteers in perspective.

If volunteers’ motives are value-based, it follows that the coordinator or facilitator needs to create a supportive, trusting environment where “volunteers see the connections between their efforts and the results that they value” (Farmer & Fedor, 1999, p. 363). Given that the

purpose of our work together was an ongoing and unresolved question for everyone during the three months I was involved with the organization, it may have been particularly hard for members of the Advocacy Committee see how their involvement in the Online Advocacy Café would contribute to the organization and their own overall values. Finding new ways to work and collaborate online was neither directly contributing to current advocacy efforts, nor directly improving the lives of people who had the disease (Farmer & Fedor, 1999).

Creating an obvious connection between volunteer efforts and their values was perhaps particularly hard for me as an outsider. When recruiting new community members, Wenger et al. (2002) discuss the need to create a two-pronged case for membership, which focuses on the benefits of contributing as well as on the value of learning from others' experience. The notion of "a compelling invitation" has indeed been used to describe one of the first steps in drawing in members to a new community (Wenger, et al., 2002) or to prepare the space and overcome the potential fear of technology (White & Shirley, 2007). However, with my limited knowledge of the organization and of advocacy, I needed to work closely with people inside the organization to create such a case and tie it directly to current work and values.

In hindsight, my description of the project did focus on value, or rather on what I saw as valuable ("we are building a community of knowledge around a practice"; "community building, learning and knowledge creation remain our goals" (personal communication, August 1, 2008). But this description was likely too vague or academic and possibly too vast to grasp.

In addition, my recognition of being an outsider may have further held me back from describing too much detail to the group. I wanted to leave it open to them and to have the group take responsibility for identifying what mattered to people "the community is yours - my knowledge about advocacy and [the disease] is minimal compared to yours - you will be able to know what is relevant and intriguing" (personal communication, August 1, 2008). While this approach may have been useful, it lacked the sense of a compelling invitation. In other words, my intent to involve everybody in the definition of the community's activities may have prevented people from immediately knowing where to jump in and from seeing the immediate value of the Online Advocacy Café.

As such, the challenges of inspiring, supporting and cultivating from the outside have become increasingly clear to me. I see that the most useful moments of inspiration, support and cultivation occurred exactly when I was able to act more from an inside understanding or showed honest interest in finding out what was happening "on the inside". Thus, realizing my limited subject knowledge as an outsider and using my outsider strength in asking questions was helpful, but in order to fulfil the role as cultivator of community and learning, I needed to make a personal move towards the inside. Such a move enabled me to become more personal

and to start acting in ways connected to people's reality, that is, to what was real for them, rather than applying a generic set of community facilitation principles.

As evident from the discussion and my reflections so far, getting to know people, culture and context and finding my own role were evolving processes. Valuing and trusting those processes became important for the understandings that eventually emerged for me as well as for participants. As several authors of large scale and systems change methods note, communal discovery of the collective intention, aspirations and purpose is understood as an extensive or even ongoing process in itself (Brown & Isaacs, 2005; Holman, et al., 2007; Senge, Kleiner, Roberts, Roth, Ross, & Smith, 1999; Watkins & Mohr, 2001; Wheatley, 2006). Thus, the notion that I needed to know from the beginning, what people wanted and who they were was challenging, because the answers for all emerged from the process. As C noted in the debrief conversation, they too, needed the process to discover who they were and what they wanted! In the following, I will discuss how lack of clarity of purpose and discovery of collective purpose was a pertinent theme of the Online Advocacy Café. It was a theme in which I as a facilitator played a major role.

## **Discovering Purpose**

### *Lack of Clarity of Purpose*

The original purpose of the project for the participants was to explore how online collaborative technologies could be used in their advocacy work and how they might build a space to share ideas around their advocacy work. In light of this intention, the process itself was part of the discovery and we did indeed achieve much of what we set out to do. Yet, this purpose never became a collective purpose that people really identified with or that helped direct our collective attention sufficiently. Participants later expressed feelings of not really realizing the immediate usefulness of the Online Advocacy Café during the process. As well, many did not contribute significantly to the wiki or show up for the proposed conference calls. This was likely linked to a lack of a more concrete and useful sense of purpose identified by themselves and related to their daily work. My predefined purpose did not adequately give them an opportunity to live through an experience of how the tools could be used in their specific context.

Looking back over the months, I realized that the issue of what the collective purpose was and what we were trying to achieve had indeed been an unresolved issue for all participants. In fact, it was notable that A and L's first and genuinely curious questions to me during our debrief conversation, were "Who was the audience? What was the target?" When asked in the debrief conversations what they thought the purpose was, I got widely different

answers from everyone. But that was not all. There was also frustration about the difference in opinion amongst themselves and those differences did not appear easily resolvable. As Cady (2007) describes it, “getting to purpose is hard work”. He continues:

Uncovering purpose can lead to lengthy debates, crumpled up paper, and starting over. Ironically, conflicts, problems, and issues are something to be welcomed rather than resisted or feared because they provide clues to what is best and needs to emerge. Inviting people to shape the specifics ensures the investment is worthwhile. (Cady, 2007, pp. 31-32)

As much as I agreed with inviting people to uncover purpose, I almost felt that such lengthy debates were not within the scope of my project. I assumed, perhaps for good reason, that fully inviting a purpose discussion would take much longer than the three months, I had set aside. I felt that such discussion was not necessarily within the interest of the group right now, and would not enable me to get to a place where I could explore anything about online collaboration and facilitation during the three months. However, this ambiguity between needing more clarity of purpose and of not wanting to fully engage in such discovery kept haunting us throughout the process. As well, I as the facilitator perhaps did not fully explore how we might have embraced the question of collective purpose and intent within the limits of this project.

#### *To Meet Face-to-face, or Not?*

Starting out, it appeared I was caught in another dilemma. I needed a case or a purpose to draw in people to the inquiry/exploration, but the purpose had to be open and flexibly enough that I could invite people to discover this purpose along the way. I felt purpose was not for me to set initially. Looking back, I wonder how an ability to meet face-to-face might have given us a more useful start to the project and helped ensure that we took off in the same direction. I feel that, given the context, my experience of not really knowing people and what mattered to them was influenced significantly by the fact that we never had the chance to meet physically and experience face-to-face socializing, discussions, commitments and learning activities together.

One of the ways CoP practitioners often deal with this initial exploration of purpose is to host a launch workshop, where people work together to discover the common energy and vision. Common components of such workshops include building relationships and facilitating experiences of collaboration and discovery of common energy, purpose, output and vision. As the facilitator, one would also use such workshop to get to know people better, start building relationships and to look for clues about the community needs, behaviour and energy (KM4Dev

email discussion list, personal communication, April 3 - 8, 2009). As well, in the workshop on CoPs, which I took part in at the time, E. Wenger explained that one of the important aspects of a launch workshop is to “include some learning activities by which members experience learning together and what it feels like”. His description of the process appeared to allow people to be part of a collective discovery and decision on the community’s direction. He describes:

a café format to get people to talk about domain issues and hopes, then a voting process to prioritize, then a kind of open-space process to go deep into the most pressing questions. This leads to conversations about how the community would operate, some visioning of what would happen if it is successful. I always end with practical next steps and immediate commitments to take actions by people present. (E. Wenger, personal communication, October 23-24, 2009)

However, knowing or assuming that meeting face-to-face was not an option, I kept thinking about how to use the ideas from a face-to-face launch workshop online. How might I enable experiences of collaborative learning and community building online? I realized that I should not confuse community building with the advocacy people’s purpose, but I missed an opportunity to initially have everybody actively join an online discussion asynchronously via email, the wiki or a discussion group/forum or synchronously via a web or conference call. Not being able to meet face-to-face, we needed more than an hour’s conference call here and there to get us started.

Yet, while this type of time commitment might have been a more obvious expectation in a project that were to occur face-to-face or even with a different group of people, the fact that it was to take place online might have caused the advocacy people to prioritize it differently. Upon reflection, I realize the importance for me as the facilitator of being very clear on the time commitments and the planning of specific activities initially, even though it could be a challenge without really knowing the group, its needs and relationship to technology. As well, such clarity and planning would have to be balanced with a recognition of the importance of process, especially since it is quite possible that discovery *along the way* may be a much bigger part of the online facilitator's role. In fact, in my separate online discussion with Wenger and others he speculated that “perhaps the launch of a completely virtual community is simply not a specifiable moment. It is a progressive interweaving of learning and self-design activities that takes place over time” (E. Wenger, personal communication, October 23-24, 2009).

A widely discussed theme in literature and practice in online learning, facilitation, collaboration and community building is in fact whether face-to-face interactions are necessary or help to strengthen relationships and build trust online (Beird, 2009; Lai, et al., 2006). Yet, I also find it useful to note that newer research seems to focus a bit more on the Internet as an

embedded part of everyday life and that perhaps the question of “working face-to-face or not” is becoming a false dichotomy of the reality that most people and organizations face (Wellman & Haythornthwaite, 2002). In our case, face-to-face meetings were not considered an option, partly because of the fact that the group was dispersed over the whole country, partly because of the limited scope of the research and my own desire to narrow down the inquiry to what took place online. I was also generally reluctant to assume that face-to-face interaction was always a necessity, especially since I was curious about enabling relationships and a social space online, which were not just considered poor cousins to face-to-face interaction.

However, had I known the group and understood their context and way of working better, I may have reconsidered some decisions and, for example, planned for and insisted on a face-to-face meeting. One of the things that the people in the core group discovered about themselves from our process was indeed that they usually needed to meet to get things started. As I will elaborate on later, I also saw how the personal face-to-face encounter with L made a big difference for our relationship and for something useful and real to occur. In the context of this group, of whom some even turned out to prefer a printed and mailed rather than electronic copy of meeting minutes, it seems like a silly and obvious mistake for me to attempt to start a collaborative process and dialogue by email and a wiki!

Thus, the question that seems worth asking is not so much whether online work *in general* requires a face-to-face component or start. Rather, it is useful to find out how people usually work and what their familiarity with online tools and online collaboration is in the first place. In other words, I did not understand this specific group well enough to know that although meeting face-to-face might not be a *general* necessity for all online collaborative work or CoPs, it was a defining element for this group because of who they were and how they were used to working.

### *Missing the Clues: Am I Really Listening?*

It is almost as if I recognized that we had not clarified purpose in a useful way to the advocacy people, but then I bypassed the discussion in order to find my notion of “topics” to work on, perhaps because I assumed that we needed a face-to-face meeting to clarify purpose. But what if we really could not meet face-to-face? What if we found ways to use technology to discover and clarify purpose? Did we really need a large launch workshop face-to-face to do that? Given my emerging understanding of the importance of working on what is real for people, I see that another important question to ask myself as a facilitator and researcher is how I may explore, listen to and engage in a dialogue about what is real on a much smaller scale, often given the limited time, resource and mandate of the involvement.

In this regard, it is interesting to reflect on my ongoing perception that I did not get any response to my inquiry about what was important to people. True, they did not sit down and type it onto the wiki, but they had in fact opened some doors to their world, which in truth, I entirely missed during the process. One of the reasons I did not see this open door may very well be that we had started out with a focus on technology, the wiki. Indeed, I walked straight past the door when I failed to pick up on the Advocacy Committee's efforts to mobilize 300 or more people across the country to make them part of their advocacy network. I cannot help but wonder now, what would have happened if we had collaboratively decided that this was the vision we wanted to explore together, and then, once we knew that (and I had really listened and suspended my own agenda), we had inquired into the most useful tools to help us in our process. Had we done that, I might not have kept wondering why people did not tell me what they cared about. Instead, my message to them now was, great that you want to mobilize all these people. What additional things can you come up with? And how do you want to do it – using the wiki?

In my journal I justified my choice of the wiki as a tool by referring to a wiki's presumed ability to enable and inspire a more collaborative way of working. In addition, I liked the idea of the wiki, its non-hierarchical nature, the possibility for everyone to contribute and the flexibility in structure and style:

I imagine that in the ideal use of a wiki you are very close to the essence of collaborative learning at its best. No hierarchy, no pre-defined structure, true user/learner centred, flexibility and room for messiness [...] I don't think that wikis in and of themselves cause collaboration, but I think a wiki can open up venues for learners and facilitators who are ready to move in that direction. (personal journal, October 8, 2008)

However, these were my values and there were at least three untested and questionable assumptions in this. One, that a wiki in itself would open up venues for more collaboration; two, that our common purpose was collaboration and community building; and three, that the wiki was the most suitable tool for this group of people and for what they wanted to do.

### *Is My Purpose Limiting the Opportunities for Collective Discovery?*

I now see several examples of how many of my decisions were based on my assumption that our goal was to create a vibrant online community and how this assumption distracted us from what really mattered to people. One such example was when I started engaging in conversations in our first conference call about the importance of showing a daily presence online. As evident from my reflections and conversations at the time (see also the

Story of the Online Advocacy Café). I was not unaware of the danger of putting my own agenda and technology first. Yet, in practice, I was unable to step away from my position. Unwittingly, such conversations about online presence locked our attention into a focus on technology, rather than on how I could help people discover online tools which supported what they really wanted to do.

For me, processes of online learning, collaboration and community building were part of my curiosity, research agenda and goal. However, in several ways, this personal agenda stood in the way of a more communal discovery, partly because this agenda was my imagined idea of what the community needed, partly because this idea had already been set as the framework/starting point for the Online Advocacy Café in my conversations with the President and Director of Education in the organization. As such, I often considered community development and collaboration as “better ways of working”, and since it was my interest to explore online community and collaboration, it also became the goal that I strived for regardless of what was suitable for the advocacy group. What I did not see was that I was perhaps much closer to an example of what online collaboration looked like in practice than I had imagined. This took me a while to realize. As evident from my journal notes during the first month, I kept thinking about changing the way the group worked:

C got back to me almost right away with some notes about purpose and outcome...While this is great, I'm concerned that there wasn't much of community flair to it. (For now) I resisted commenting on the content and just encouraged her to share it with the others to get the discussion going. Wenger, et al. (2002) recommend starting out by “building a case” for the community. But my sense is...right now, I've got to get them on to some community building activities such as sharing a personal advocacy story or brainstorming on what it takes to create a café environment. (personal journal, October 1, 2008)

My hope was that if I could just facilitate experiences of deeper form of collaboration online, then trust and common meaning would start to develop, the energy would soar and everybody would start to see tremendous value for their work and for themselves personally and professionally. This, in turn, would enable community members to know what they wanted to do, that is, what activities they would pursue and what their goal was. This could perhaps have been true, if together, we had identified deep collaboration and community building as a key need, interest or goal for this group. But we had not done that.

Practitioners Beth Kanter and Nancy White on the WeAreMedia wiki, discuss the importance of determining what people want and need before attempting to create a community:

Do you really want a community, or are you simply looking for ways for people to access and create content, but they really don't need/want to interact with each other and form relationships while interacting over time around a topic of shared interest. (Kanter & White, July - August, 2008, bullet point 4)

The question appears obvious, yet perhaps the presumed ease of “connecting” has a tendency to make the idea of an online network or community appear attractive. Thinking back to my initial conversation with the President and the Director of Education, the possibility of “connecting” was certainly one of the drivers for our project. Yet, merely having the option of connecting through the use of an online tool does not ensure that people actually want or *experience a connection*. This is an important distinction. Connections are about relationships. In my experience they tend to happen around a common purpose. And our common purpose was not clear.

The specific idea of an online CoP was indeed my personal curiosity, conceived because of the conceptual appeal rather than because of the specific context I had met in the organization. Only one of the people in my small core group had actually expressed some excitement about it and reiterated the idea in her own language. There was no common wish or understanding about a CoP. Similarly, I had already decided *for* people rather than *with* them that a wiki was the right tool for their way of working and for what they wanted to do. This was ironic, since it was completely the opposite of my intention. I did not see that during the process, where I felt I made several attempts to be open, involve and make decisions *with* people, but was puzzled about their silence:

It is the oddest thing that I don't seem to be able to focus people around a common purpose. It seems so obvious that that's what we need. I wrote them an email just now, where I'm honest about “feeling a bit lonely” in the café. I also talk about what activities and questions they want to focus on. But they don't seem to catch on to it. Why not? Perhaps they don't see the point yet. Perhaps they don't feel ownership? (personal journal, October 14, 2008)

But how could anybody be part of a collective discovery when they felt confined by technology, an abstract notion of community and a pre-defined design? As L later noted: “We did not understand the technology, so how could we say what we wanted to do, when you asked us about projects and activities?” Likewise, how could I expect anybody to respond to the suggestion I made during the second conference call to use emails and conference calls as complements to the wiki? My intention then was to focus on tools that were familiar and simple to people, yet, how could anybody decide what tools to use, when they did not know what to use them for?

The fact that technology had been decided and that I entered even with a loosely defined researcher agenda made it difficult for people to feel that the Online Advocacy Café was part of their exploration. Unwillingly, I had positioned myself as “expert”. I was not unaware of this and started asking myself questions in my journal such as: How might I instead focus on community building, knowledge sharing, learning and growing together as an organization? Was this even my role at all – not to mention within the scope of my thesis research? What had happened when in the initial discussions with the organization’s leadership that might or might not be reversed? And more specifically, where did that idea of the wiki come from and how could it be a tool for the community to support its real issues? What if I turned the question of which technology to use on its head and decided *with*, rather than *for* the community?

However, I did not manage to translate these questions into a discussion or actions with people. Further, I *had* actually readily accepted the premise of the exploration of technology being one of our purposes. As such, I was caught in a bit of a paradox. At the time, I was not able to express it so clearly but essentially I had initiated a research project on premises I did not fully believe in and based on that realization I found it challenging to know how to proceed. I felt it was too late to start completely from scratch and honestly ask what really mattered to people and find out what they really wanted to do. Perhaps, at some level, I was worried that the answer would be completely different from what I wanted to do...

### *Can Purpose be Adaptive?*

What held me back from discussing purpose further was also the idea that purpose needed to evolve as people started working more collaboratively on the wiki and experienced some of the possibilities of a new collaborative way of working online. Hence I did not want to push it for fear that we would limit our ability to adapt and change as we learned. I wanted flexibility.

However, clarity of purpose does not necessarily mean we become inflexible. Wheatley (2006), who writes extensively on chaos and change in organization, also discusses the implicit order beneath the surface and says: “if we can trust the workings of the world, we will see that the strength of our organizations is maintained if we retain clarity about the purpose and the direction of the organization” (p. 131). In fact, a systems perspective on organizations would certainly look at constant improvements and adaptation as involved in accomplishing and supporting purpose (Holman, et al., 2007).

Thus, the Online Advocacy Café became an example of some of the challenging balancing acts likely to face me as an online facilitator. I needed to support an initial exploration of collective purpose and clarity of direction, while allowing for flexibility and discovery along the

way. But before that I needed some opportunities to listen and get to know people and context enough to draw them into a process, which appeared valuable to them while also supporting my own research agenda. The Online Advocacy Café did not give me a “solution” to these dilemmas and balancing acts. But it gave me an understanding and taught me some of what I might want to be aware of. It taught me that the more open, inquiring and honest I am able to be about myself, my intention and what I truly see, feel and hear, the better the changes of acting in ways that balances the process and most usefully supports the needs for me and for the people I am working with.

### **Authentic Online Facilitation**

#### *A Human Connection: When I Learned to Listen*

In my readings and experience of online facilitation, community and collaborative learning, the words *trust* and *relationship building* seem to come up again and again as critical elements for the promise of collaborative learning and a flourishing community (Kimble, et al., 2000; Lai, et al., 2006; Wenger, et al., 2002). While these concepts have been close to my heart and practice for a long time, it was not really until I met L that I truly experienced the meaning and impact of cultivating and nurturing trusting relationships as an online facilitator.

“I regard this as a place that I can be myself and you will accept me the way I am now”, L wrote on the wiki’s “Personal Stories page”. I felt she was speaking directly to me. I had travelled into the city to meet her in the national office and was sitting in a chair next to her. Her words felt like a call or a question that I understood to be something like this: “I think you are starting to understand me, I have experienced your support over email and over the phone for the past month and now you’ve come in here to sit down and talk with me and help me. I am starting to trust you and feel safe. So, do you really accept me as I am?”

When she wrote that she regarded the wiki as a place where she could be herself, I knew that it was not because of the wiki. The wiki had been a useful tool for what we wanted to do. Yet, what enabled us to use it was our human connection. The comfort and trust, which instigated L to write, was a seed of the relationship between the two of us. It might even have catalyzed the process.

As a facilitator, I had been able to find ways to provide a safe harbour for her to talk, yet there was no exact recipe for what created that safe harbour. Aware of stories’ ability to touch, connect and build relationships, I had encouraged sharing personal stories inside the Online Advocacy Café. Yet, there was more to it than that encouragement and the creation of a page entitled “Stories”. I knew that over the past month, I had been responsive and present while I slowly started to suspend my assumptions and listen without resistance (Isaacs, 1999; Senge,

1996; Wheatley, 2002b). I knew that when I sat with L in the office, I was able to be fully present as a human being. Despite the somewhat sterile office, I was back around the café tables in an intense, warm café atmosphere. I felt real.

After this meeting, the disease was no longer just *the disease*. It had a personal face. Yes, I had met people with the disease before, but I had never really listened to them and heard their story. Now, it was real to me. I was able to better understand what it felt like to always be judged in public and to not be able to do what you once could. I was reminded of how someone else who had the disease once told me that people often thought he was drunk when he took the bus. I saw that L's words were a general call for acceptance and understanding. It was the most powerful advocacy story and personal invitation to meet everyone as they were.

Writing down her story was thus a personal achievement for L as well as a general call for others to accept her as she was. She later told me how she had invited someone to read it, after which they had asked her if she wanted them to correct it for her. Yet, this did not seem to discourage her. She and I knew that they had missed the point. She had crossed a personal barrier and she knew that several people would be able to do the same thanks to her example. For the first time since we started the Online Advocacy Café, I felt that we were getting close to something that meant something to people. As well, I had experienced an example of my own online facilitation role in nurturing the space for this to occur.

#### *Am I Willing to be Changed? To Give Up Control?*

L touched me personally and taught me to listen more deeply. She reminded me that relationship and trust is a two-way road, which requires personal investment, openness and vulnerability from my side as a facilitator as well. I suddenly understood how "real listening is a willingness to let the other person change you" (Alda, 2006, p.159) and that my openness to such change had the possibility of affecting our relationship as well as the general process.

L reminded me of why I have chosen OD as my field of practice and that the human-centred online facilitation I value is not a routine endeavour. She reminded me of being fully present and authentic. I was not acting out a role, not pretending. I was open to the process, I was letting the events unfold and I was laughing with her.

The meeting with L was the first and perhaps strongest example of a phenomenon that I started to experience and recognize over the coming months with the advocacy people: When I gave up control and listened, they (or we) discovered! In other words, my ability to give up control of the process was directly related to how well people were able to engage in a process of discovery of who they were and what was important and real to them. "Getting to the

‘different place’ that allows presencing to occur begins as we develop a capacity to let go and surrender our perceived need to control” (Senge, et al., 2005, p. 96). In order to start discovering online learning, collaboration and community building in this specific context, I needed to let go of my conceptual idea of what it meant and looked like to learn online and instead be present to the moment and the people around me.

## **Avoiding the “Technology Traps”**

### *The Myths of Participation*

Although technology was initially one of the focal points of my inquiry, my explorations so far have mainly concentrated on understanding people, context, purpose and my own role as an online facilitator in the discovery of what was real/space for learning and community online. This does not mean that technology has become a minor afterthought. Rather, it means that I as an online facilitator am discovering *in practice* what it feels like to put people’s uniqueness and aspirations first. I recognize my OD values in a field of online facilitation and I see how my approach to facilitation has the potential to glue pieces together, create comfort and help people learn by bridging the gaps between process technology, content and experience (White & Shirley, 2007).

Yet, in this process, I also see how technology in subtle ways may divert our attention from what matters, even in my case with my espoused heightened awareness and attentiveness to people’s needs. One of the most obvious examples of this is the notion of “participation”.

An ongoing challenge in the literature on online learning, facilitation and community building appears to be how to gain involvement and get people to participate (Lai, et al., 2006; Hildreth, Kimple & Wright, 2000; Wolfwater, 2007; Tarmizi, Jan de Vreede & Zigurs, 2006; White & Shirley, 2007; 21<sup>st</sup> Century Learning, 2007). Indeed, Tarmizi, et al.’s (2006) survey-based study on challenges for facilitation in CoPs outlines how several facilitators perceive “participation” as one of the key challenges in facilitating CoPs. I recognize this language of how to get commitment, involvement or participation from my previous experience in the field and from the conversations with the advocacy people, the Director of Education and the President.

During my involvement with the organization, participation appeared like a major challenge. I seemed to be in a constant chase for participation and commitment and I noticed how “lack of participation” from others seemed to discourage participants who were visibly contributing to the wiki. I tried to engage people through compelling questions, hoped for energy from new members and had conversations with the core group around how to increase

participation, as though this was our main goal. Yet, taking a step back, I see how *participation* can be somewhat of an empty word. I realize how I might have been caught in one of the most common fallacies or traps of working with technology. Participation was not our goal. The wiki was not an end in itself.

Firstly, how would high participation numbers account for some of the seeds of awareness slowly triggering through the organization as a result of the process? How could those numbers tell the story of the value or usefulness of learning occurring for individuals as well as for the group as a whole – in our context? How would it show the value or usefulness experienced by the majority of people who could be characterized as “lurkers?”<sup>5</sup>

Secondly, I saw small examples of how the concern about participation seemed to evaporate as soon as people had a meaningful experience. Instead of focusing on participation, it was worthwhile asking if people had a compelling *reason* to participate. I realize how I tended to get side-tracked to looking at number of wiki edits or logins whenever I did not see any activity on the wiki, rather than focusing on what was meaningful/what mattered to people. As White and Shirley (2007) write:

When people have a meaningful online experience, the first question [of whether online is a poor second to face-to-face] goes away. The challenge is designing and deploying online interactions that capture deep attention, meet real needs and connect people with warm, electronic communication. (p. 558)

#### *Overcoming the “Technology Barrier”, or...?*

As well as focusing on what was meaningful to people, I also needed to help them see a reason that this new tool, the wiki, would be better than the existing methods for communication they were using. If I could not do that, the wiki was probably not the best tool. The illusion that collaboration and participation would spontaneously occur because of the great attributes of the wiki seemed to catch me in a technology trap, almost embarrassingly common amongst people trying to promote various technologies for collaboration. I am left with the question of how I or others may avoid this trap in the future. In hindsight, I know far too well that it would have been more useful to identify an immediate (real) challenge, that technology (wiki or whatever tool would be most appropriate) could help solve. Indeed the group’s real task of mobilizing 300 or more people across the country might have been an obvious example of such a challenge.

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<sup>5</sup> According to Wikipedia a lurker is someone “who reads discussions on a message board, newsgroup, chatroom, file sharing or other interactive system, but rarely or never participates actively” (Lurker, 2009, para. 1). Literature on online learning communities discusses how up to 90% of people in an online community tend to be lurkers. However, the phenomenon is generally not viewed as a bad thing, but rather, as a normal characteristic or a consequence of online collaboration.

Thus, it appears that while lack of participation and commitment may *appear* as some of the obvious challenges to overcome online, they are only indicators of something else. When working online, technology may appear as a barrier that deters participation. But perhaps technology becomes a goal or the focus of attention exactly because it starts out as a barrier? What might happen if we did not start out with a focus on technology?

Rather than attempting to boost participation in the technology as such, my attention as online facilitator appears more usefully directed at ensuring that the technologies used are the most appropriate ones for the context and for what people want to do. Once this link is obvious, I can start thinking about how best to support individuals in using the technologies. As I will elaborate on in the following section, this requires me as the online facilitator to get to know people and adjust my notions of access and training. As well, as much as I may celebrate learning with everyone else, the experience with the Online Advocacy Café showed me the importance for the online facilitator of being a technology steward, able to understand how various technologies might be helpful for a specific context and group of individuals, and not downplaying my expertise in this area.

### **New Meanings of “Access” and “Training”**

#### *Access as Comfort and Simplicity*

The notion of *access* online often triggers associations of availability of computers with Internet connection and appropriate bandwidth, as it did for me when the issue was brought up in the beginning of the Story of the Online Advocacy café (i.e., Preece & Maloney-Krichmar, 2003; Wenger, White, Smith, & Rowe, 2005).

However, as the above mentioned authors also touch upon, access turned out to be about a lot more than the size of the bandwidth. In fact, by limiting the core group's concern about access to ensuring that everybody had a computer with an Internet connection, I overlooked a major message about the people I was about to work with. As L taught me, access was about comfort and about feeling safe. It was about learning how to learn online, not in a generic sense, but for this particular group of people.

Access also seemed to mean simplicity. Wenger, et al. (2005) and Wenger, et al. (2008) emphasize the need for technologies to be simple and accessible and start where the users are. Thus, access may mean integrating technologies into existing tools or work (Koch & Fusco, 2008). The notion of access and expertise was also discussed in the workshop I attended on CoPs:

Lack of technical expertise can really make life difficult for some learners in these online courses and I have seen the introduction of a wiki into a course (in the past

when they were a less familiar tool) completely prevent some learners from participating.

So it seems to me that our first concern as leaders of a community or course is to ensure access for participants. Dependent on the context, this might mean using very simple tools or the opposite. (M. Mackness, personal communication, September 29, 2008)

In hindsight, the sole reliance on the wiki as our café community had indeed prevented people from participating. A deeper understanding and attention to people and their context, as I have discussed earlier, may have enabled me to change focus from access to the wiki, to access to the community, or access to collaboration and discovery. After all, the goal of access was access for the community to do their work and not access to the wiki itself. With this in mind, I might have suggested simpler, more familiar tools, suitable for their purpose and context, or perhaps a mix of tools, of online and face-to-face interaction. I might even have held back and decided with people what tools felt most accessible.

As such, my notion of access was radically altered as I learned about the advocacy people and started to understand about the disease, the generational difference between me and them, how they usually worked, what they valued. Access could look as simple to me as how to find and login to the wiki, but there was a lot more behind it than that. Finding and logging into the wiki might have felt overwhelming, scary or even abstract. As I touched upon earlier, it may even have appeared pointless. Individuals needed to feel personally confident and supported. They needed nurturing when finding themselves and when exploring the group's purpose in relation to the wiki. This was an important role for me. But how could I practice it?

### *Juggling Multiple Roles: Technical Expert, Trainer, and Community Facilitator?*

During my involvement with the organization, I often pondered my own role. I realize that it was neither clear to me, nor to everybody else, what my role(s) were and how those roles might change with the process. I recall letting the core group know in an email that I could “assist and facilitate with my knowledge around technology, community building, collaboration and learning” (personal communication, August 1, 2008), but in practice, I do not think any of us were sure of what that meant and the email did not really invite that discussion either.

From the outset, I saw myself in the role as a trainer as well as a community facilitator. At times, I would be able to educate people on how to use the technology and perhaps on principles behind community building and collaborative learning, whereas at other times, I would focus more on interpersonal dynamics, relationship building and coordination of

activities. I knew that facilitating CoPs could involve several roles (Fontaine, 2001), that my role would likely need to change at various stages in the process and that I would need to use my technical as well as social and interpersonal skills (Gray, 2004). But I may also have been confused about these roles at times, when I hesitated to appear as too much of an expert for fear of interfering with my values around community facilitation.

Instead of assuming a more educative role in preparing people for the challenges of the wiki world, I had tried to model behaviour by encouraging the core group to “explore” and “play around on the wiki” with me from the beginning. I might also have overlooked the need for a different kind of training, because my peers (including myself) and people in blogs and online discussions, as well as in the corporate world, seemed to marvel about how intuitive and easy wikis were to use.

But I may also have resisted a more directive trainer role for ideological reasons of wanting to *learn with* people rather than appear as an expert and *teach* them. This attitude was perhaps useful in learning and discovering a group culture online and how people might use a wiki in their particular context. However, as Federman and Laiken (2008) suggest, such a more emergent or unstructured approach to leadership and development of group culture can be useful when it is consistent with the purpose of the group. In my case, however, I had to question whether resisting a trainer role was really consistent with the purpose of our group. As I later saw, this was an example of situational leadership (Hersey, Blanchard, & Natemeyer, 1979, as cited in Laiken & Federman, 2008) where people needed me to guide them in an experience of getting to know the tool first.

Thus, as nice as the philosophy of learning with people may sound, I discovered that my encouragement was too open-ended for someone with limited experience of “playing around” online, who may have had trouble remembering simple instructions, were volunteers with several priorities and did not clearly see the value or purpose in our project yet. In this context, it was not enough to merely “tell” people to play around and that technology was not our focus, as I had done in my initial email to the core group. Without the experience, without the training, technology remained a barrier.

It was confusing to me to gradually realize that my educator and community facilitator roles were not preceded by the required in-depth discovery of what was needed and what people really wanted to do. I saw the need for facilitation of a larger discovery of purpose, without being in a position to follow through on it. It appeared beyond my small intervention since I was perhaps often seen (or regarded myself?) as the technical expert or trainer of a limited project. Yet, Lippitt and Lippitt (1986), who discuss the multiple roles of consultants, argue that “the role assumed by the consultant may vary from moment to moment” (ch. 4,

section 3, para.1) and that “every competent helper must be flexible enough to function in a variety of roles” (ch. 1, section 5, para. 3). They also warn that a pure expert or trainer role may focus only on people learning something and miss the structural issues that block people from using what they learn.

While the felt need for a more in-depth discovery is possibly an implicit limitation of any OD intervention or process lasting only a few months, it demanded the question of what was really possible to do within my time frame. How might I most usefully take on the multiple roles needed on a small scale. Was there still room for some discovery and was the process still worthwhile? I will return to this question in the concluding section “Small Seeds: Big Trees”.

### *A More Nuanced Understanding of “Training”*

If technology was to become really useful, I had to realize that my role as an online facilitator included my expertise as a trainer. White and Shirley (2007) argue that good online facilitators need face-to-face expertise as well as comfort and skill with technology. “Often the facilitator supports the group processes, and serves a tech support and tool trainer. Often they model online processes unfamiliar to a group, such as sociability in a foreign environment – ‘talking’ with people they can’t ‘see’” (p. 554).

When I did assume more trainer responsibility, as during the Power Brunch on the Wiki, the result appeared very positive. All of a sudden, people were being asked to do something concrete and I had something specific to offer them in return. When C commented on how being “forced” to be on the wiki during the call had helped her motivation for the project, I realized that perhaps assuming a more educational role was not such a bad idea after all, considering that none of them had worked on a wiki before.

The Power Brunch on the Wiki was an example of training in how the wiki worked and of modelling a somewhat different and more social way of working online. This was important, since learning on the wiki was not just about how to edit a page, but it was also about understanding a different way of working where text and content could be messy, constantly negotiated and changed by anyone. I had become more knowledgeable about wikis and was consequently able to address these new challenges. I was not resisting the trainer role.

This was a different kind of training from any standard programs on “how to use a wiki”. It was an experience of usefulness in action, that is, of the wiki in the specific context of the Advocacy Committee. Just as I later experienced with L, this usefulness in action directly influenced the feeling of a valuable experience and the activity levels afterwards. I saw that training could be an important part of the rhythm of a community and spur excitement before and after the training event itself. The access barriers diminished, as the advocacy people

began to discover how the wiki could be used as a tool for their advocacy work. “Training” had been useful because it had a very practical component supporting our larger process of discovery.

As such, my emerging understanding of training, as with the notion of access, is much more multi-sided and nuanced than what might normally be associated with the word. The “training”, need for support and the notion of access might have played out differently for a different group of people. But for the advocacy people, it was about comfort, confidence and self-respect in an area that felt new and somewhat daunting. It was about experiencing that nobody was alone in their cautiousness, that everyone did have something to add and that it was not possible to do anything wrong. And it was about beginning to understand by experience how their daily work could be eased by the tool.

As I came to understand the group better and listened to who they were, I stopped resisting taking on the trainer role. I became more confident in managing the polarity between structure and emergence (Federman & Laiken, 2008), and in providing some leadership to get things started, while staying centred on my values around community development as a natural process developed by everyone collectively (Lai, et al., 2006; Wenger, et al., 2002). I started gaining a more nuanced understanding of what training could look like in this situation. I also gave up my preconceived notion or ideas about the process and about what people wanted. In a sense, although I offered more direct assistance and was more directly responsive, I gave up control.

### *Online Facilitator as Technology Steward*

“People were hesitant because it seemed very public”, D reflected in the debrief conversation. In general she experienced that people were “not comfortable with editing someone else’s work” and “hesitant to have their own words and opinions out there for scrutiny”. Her words made me consider how sharing writing in general is often an intimidating experience and how a wiki, where the sharing perhaps appears even more open or public, easily becomes even more daunting. Prior attention to or experience of these potential challenges of working on a wiki might have caused me to rethink the choice of a wiki. And even if I considered those challenges manageable and a wiki the best choice for what people wanted to do, a mix of deeper knowledge, experience and practice would have helped me prepare people better before and during the process.

As an online facilitator with focus on people before technology I have repeatedly told people half jokingly that I was not one of these very technically adept people who knew all the ins and outs of technology. It has been a reassurance to prospective online learners that such

technical adeptness was also not required of them. At the same time, there has been some truth to the statement. In fact, it has always been the interaction with technology rather than technology itself that has interested me. As most people my own age and older, I still consider myself a newbie in the world of social media networking, and I find it hard to navigate the complexity of potential relations, let alone feeling confident about my own online identity. Yet it is precisely this awareness of my own experience that has previously enabled me to connect and to establish meaningful relationships with learners as they took their first steps with technology.

However, while I still see such sensitivity as important, my experience in this research process has led me to question my own assumption about the needed expertise of the online facilitator. Could it be that some “expert” knowledge from an online facilitator would actually be required or of help to people in certain situations?

Wenger, et al. (2008) discuss the role of online facilitators as *technology stewards*. According to them technology stewards are: “people with enough experience of the workings of a community to understand its technology needs, and enough experience with technology to take leadership in addressing those needs” (Smith, 2006, para. 1). As such, they clearly emphasize the need to understand community *as well as* technology. Further, “stewardship typically includes selecting and configuring technology, as well as supporting its use in the practice of the community” (Smith, 2006, para. 1).

My choice to work on a wiki in this process was not qualified by a deep knowledge of either the community's needs or by extensive experience with collaborative learning and community building on wikis. I had worked with wikis before and had a notion of a potentially flexible, non-hierarchical space for collaboration. But I was not able to clearly express to myself, nor to the participants, what might be potential uses, challenges and limitations of wikis until the Power Brunch on the Wiki, and finally during the face-to-face national Advocacy Committee meeting towards the end.

In particular, the Power Brunch on the Wiki made me see the value my own technical knowledge and of personally being able to express, even teach, people about the wiki. It demystified it to participants. It gave them an opportunity to try things and ask questions. I was taking responsibility and showing leadership in addressing their needs. Most importantly, they experienced how I modelled using the wiki in action, for example by typing up minutes as we went along.

## Technology as Catalyst for Change?

### *The Possibility of a Spark*

In what ways may technology change behaviour or culture? This question keeps popping up in the story of the Online Advocacy Café. It appeared relevant to me as a facilitator when I looked at finding tools that would support the participants' existing way of working, perhaps even be known to them; while at the same time I wanted to plant seeds for more collaborative ways of working and learning.

Intuitively, I knew that technology was a tool. It did not change culture. People did. But would the technology push anybody to work differently? Or how might it be used as a tool or enabler for change? Certainly, I felt some grain of personal urge to rely on technology as a solution for changing behaviour and “turn this group into” a collaborative community. How nice it would be if the non-hierarchical and flexible nature of a wiki, would translate into new open venues for conversations for our community. Even as I approached this national health charity, I saw, as I had experienced in previous situations, how technology seemed to provide an opening for something new and exciting to happen, for new “connections” and relationships to be created.

At the same time, I could think of several examples of how the ability to use a new technology had gradually changed behaviours or common work practices; cases in point being emails, cell phones, word processing programs and increasingly online social networking tools such as Facebook, Twitter, wikis and blogs. But it always appeared to me as dangerous territory to rely on technology as the impetus for change because of the potential of losing touch with what really mattered to people. Yet, the issue was more complex ...

“Change starts from a tiny spark, even a technology spark”, write White and Shirley (2007, p. 547). They argue that technology may sometimes represent “a social system’s implicit desire for change” and consequently change behaviour or communication patterns. The picture, which has slowly started to emerge through this thesis, is one of technology as a *possibility* for different or new kinds of conversations or relationships, but *only* if the focus is on the conversation and relationships and not on the technology. In other words, you can talk about social tools, but not of tools being inherently social. The behaviour, culture and actions of the advocacy people and of me as facilitator mattered far more than the choice of technology. Even with a “technology spark”, a human desire or need for change must be behind it.

### *Recognizing People as Change Actors and Tool Operators*

It is easy to start liking the idea of the possibilities in the technology and to imagine how it is going to “solve” an organization's or community's challenges and for example “make” it

more collaborative. But as B. Stuckey said in the workshop on CoPs I attended: “I would question that any tool is inherently social. That might be its intent or its design or some capacity, but not an outcome” (personal communication, September 30, 2008). This means, for example, that if the goal indeed is to enable a community to flourish, the first step will be to realize that technology neither is, nor creates the community. I notice similar signs of practitioners in the blogosphere discussing the confusing and perhaps even deceptive notion of the ability of social tools such as a wiki, to innately *do* or *create*:

I'm finding that there is a lot of confusion between the concept of social media and the concept of community. They are often used interchangeably and they are not the same thing. Social media can help foster communities but social media can be limited to allowing a conversation around content...which is \*not\* community. (Happe, 2008, para. 1)

Just because we are using tools we have not changed behaviour and, for example, created a community. Or as others note: “You can build the infrastructure, but you need people to nurture it” (Grant, 2008, para. 6) and “what we can do is build an infrastructure where the community can live, and we can invite people who care about a subject to come in and start talking” (Schulte, 2008, para. 8). Technology can perhaps inspire new ways of working, but only if people's context, questions, dreams and wishes are taken into consideration by facilitators as well as other participants. Various online technologies may be useful tools, but they must be operated with the care of people. Technology alone does not do it!

While I might have known this beforehand, I still struggled with finding a practice for it throughout my involvement. As an example, I thought old behaviours would be easier to change if we were not in a conference call. Yet, just as a fancy office or fashionable clothes may make you appear different for a little while, it does not change the core of your personality. The advocacy people were not ready to jump onto the wiki and start behaving differently. For them, a wiki was not the spark for change.

It is interesting to note that when something did perhaps change, it was during a conference call - the old-fashioned tool. The Power Brunch on the Wiki was a conference call, which was *done* differently. I, as online facilitator, modelled behaviour that enabled a relaxed and fun atmosphere, where people felt comfortable asking questions and experimenting with the wiki. I may have contributed to creating the space. But the wiki itself had not changed behaviour.

When L started writing and sharing her story it was not because a wiki had been put in front of her. It was because of the trust and relationship, which was starting to grow between us. Moreover, she had something to say, something that mattered, and with some gentle help I

showed her how to say it a little louder (Wheatley, 2006). In that context, the wiki became an enabling tool, a sought-after venue and an opportunity to talk.

Similarly, for D, the wiki came to represent an opportunity to put forward project ideas, which she wished the community would work on. While her wiki edits did not directly cause involvement and commitment from committee members, she was planting seeds. At the same time, the process enabled her to put together her thoughts on the issue in a way she had perhaps not done before. What enabled her were the conversations and visions inspired through personal conversation with me. I directly pointed her to the wiki as a venue for enabling the seeds to grow. The wiki became a tool and a space, but it was our conversations and relationships that inhabited the space.

As such, the process of working on the wiki enabled the group to do things or ask questions, which were perhaps difficult to ask before. Towards the end of my involvement, the discussion amongst Advocacy Committee members centred on who would have access to the wiki, how open they should be about their work, who would take responsibility amongst staff or volunteers and how they would engage with the wiki (that is, each other) on an ongoing basis. These questions were not new. In fact, as White and Shirley (2007) discuss, the process merely surfaced some of the ongoing and often unresolved questions in the Advocacy Committee regarding allocation of responsibilities for work and ongoing engagement around tasks. The possibility to work with new tools such as a wiki did not make old issues disappear. On the contrary, it may have made them more visible.

The process as a whole might have planted seeds, which would start to sprout one at a time, enabling conversations about what mattered. However, the nourishment of those seeds had to come from people starting to honestly inquire and listen to each other. This would make the process real in a way a wiki on its own could not.

But while technology, used as a tool in the right context, might have given spark to new conversations, the opposite also happened. Technology appeared to effectively impede change, when I, as facilitator, allowed it to drive the process and more or less consciously acted as if technology was “the solution” to facilitating collaboration and connections. Thus, the question of technology as a catalyst for change is perhaps more a question of looking at a system’s, a group’s or individual’s needs and desires for something new to happen. Such an understanding of what drives people in their specific context, combined with general expertise of how different technologies may be used, and an ability to translate that into specific context, could indeed allow the online facilitator to help people make technology a really useful tool; perhaps even a catalyst for change.

### **Self-discovery, the Art of Mastery and the Reflective Practitioner-Facilitator**

This third circle of discovery, has carried me through a highly self-reflective process as I have come closer to an understanding of who people really were, what their context was and how technologies might or might not be useful tools for what they wanted to do. To discover this in practice, I needed to let go of my need for control of the process and really listen. But I also needed to understand the shifting and varied needs of the people I was working with and adjust my actions and roles accordingly.

What I discovered was far from both a laissez-faire approach and from a generic top-down model to online facilitation. Only when I had really listened, could I be the host of the online space by supporting the group in their needs and taking leadership for their technology needs, as necessary. The challenge was to be able to navigate the roles and, as the ultimate host of the café, assess everyone's needs and the collective energy at any time. This would perhaps have been true online as well as offline. However, I needed to treat my own role and relationship to technology differently because participant ability, access and comfort with collaborative technologies and conference calls were needed for us to start a conversation in the first place.

Thus, as I learned about the advocacy people and journeyed with them through the process of discovery, I needed to become aware of my own assumptions, mental models (Senge, 1996) and facilitator approach before expecting any possibility for collective discovery or learning. I saw that learning implied recreation of ourselves, an enhancement of our capacity to learn through aspirations, complexity and reflection (Senge, et al, 1999). I experienced learning as a journey (Laiken, et al., 2008), a practice and a generative and transformative process, where I continuously reassessed my assumptions (Argyris, 1994; Mezirow, 1991) and went through some inner shifts in values, aspirations and behaviours (Senge, et al. 1999). Learning about others started with self-discovery and awareness.

This was my action research in practice. Each time I went through a small cycle of action, experience, observation, reflection, I experienced small shifts in my behaviours and practice. The largest such inner shift occurred after the meeting with L, yet, looking back at the process I also gradually shifted my focus inward in order to understand my own role as a researcher and facilitator in the process. I learned to see that mastery as a facilitator was not about "perfect" results or design, but about continued learning and practice. Most importantly, I think I gave up control of the process in the sense that I stopped seeing my preconceived ideas as the right way (Archer, 2009).

Cady (2007) discusses the notion of the "art of mastery" of the consultant as intention, continuous education of oneself, embodiment of values and of the importance of having a

support network and of getting “back on the horse” (p. 42). “Practice, practice, practice” is the cornerstone of mastery (Cady, 2007, p. 41), and action research and reflection in and on action are important components of such ongoing practice. Senge also refers to this type of continuous learning and self awareness as “Personal Mastery” (Senge, 1996) and speaks of an ability to be fully present (Senge, et al., 2005). I also notice similar focus on personal learning in other OD literature, such as Block (2001).

When we become aware of our mental models we are able to stop our habitual ways of thinking and perceiving (Senge, 2005) and avoid the tendency to jump from observed behaviour to undiscussed interpretations and assumptions (Argyris & Schön, 1978; Senge, et al., 2005). This is a precursor for real listening and constructive dialogue (Isaacs, 1999). While this is challenging at the individual level, groups may find it even more difficult (Driver, 2003; Laiken, et al., 2008; Senge, 1996, Senge, et al., 2005) and it was therefore no surprise that the advocacy people could not tell me all about their mental models and culture or start examining assumptions about their existing ways of working, including their assumptions around technology.

As well, organizational culture does not change overnight (Senge, et al., 1999) and this change is not something “done” by one individual (Brown & Isaacs, 2005; Holman, et al. 2007; Owen, 1997; Watkins & Mohr, 2001), especially when this individual is not part of the organization. I thought that this project might change the culture and the way people collaborated. Facilitator or not, it is quite a human feeling to want to make a difference. As I have already hinted at and will discuss further in the conclusion, I also think that something did change. But the change was not immediate or as far reaching as I perhaps dreamt of. In fact, what I dreamt of was not only much too large a systems change to be within the scope of a small “project”, it was also “my dream” of an online collaborative organization, rather than a dream that was necessarily suitable for the people I worked with.

The sensation that this was “old” knowledge and general “truths” in OD work, enabled the experience to stand out that much stronger once I opened my eyes to what was really happening. My increasing self-awareness combined with this experienced knowledge and use of literature and online networks enabled me to move from general questions to specific context. I started to see what some of the challenges might be on the path to gaining a deeper understanding and experience of the way a particular group of people or community works. Further, I saw how such understanding was critical for the notion of access to technology. Access could not be assumed and technology was only useful to the degree it was understood as tools in processes, which felt real and mattered to people.

## Chapter Four: Conclusions & Implications

### Discovering Online Tablecloths and Cultivating “Space” Online

*Raven, Teach Me to Ride the Winds of Change*

#### ***RAVEN, TEACH ME TO RIDE THE WINDS OF CHANGE***

*PERCH WHERE THE WIND COMES AT YOU FULL FORCE.  
LET IT BLOW YOU APART TILL YOUR FEATHERS FLY OFF AND  
YOU LOOK LIKE HELL.*

*THEN ABANDON YOURSELF.  
THE WIND IS NOT YOUR ENEMY.  
NOTHING IN LIFE IS.*

*GO WHERE WIND TAKES YOU*

*HIGHER LOWER BACKWARDS  
THE WIND TO CARRY YOU FORWARD WILL FIND YOU  
WHEN YOU ARE READY.*

*WHEN YOU CAN BEAR IT.  
(Wheatley, 2009)*

As I enter the closing circle of my discovery, I am wearing Raven’s new feather coat. I am changed. My questions are, if not answered in their original form, then deepened, explored and developed. Looking back at the Online Advocacy Café, I did not discover a fixed recipe for putting tablecloths on the online tables and for “designing” for aliveness. Rather, I realized that creating space for people’s voices and for aliveness online was a deeply personal and reflective process where discovery was part of the journey for me as well as for participants. Online tablecloths or aliveness could not be simply added, nor planned for, they were an integral part of the process.

Online tablecloths were about listening and finding ways to discover what mattered to people and nurturing relationships and possibilities for this collective exploration. Online tablecloths and aliveness were about finding the most useful tools to do what people wanted to do based on their specific context. They were about finding my dynamic role as an online facilitator and being able to know when to take leadership in selecting the most appropriate tools, modeling behaviour and helping people feel comfortable online. But merely making people feel comfortable online had no meaning unless it was connected to a deeper purpose. Online tablecloths were about collective exploration and clarity of purpose at the same time. A process with no meaning had no aliveness. On the other hand, people and conversations came alive as they focused on something they felt was real.

As an online facilitator, the ability to honestly reflect on the process and my own role and to essentially abandon my own agenda enabled me to start understanding who people were and what mattered to them. This gradually deepening understanding became crucial for any collective explorations online. It nurtured relationships and trust and enabled us to ask questions about purpose. Further, it allowed me to notice some of the challenges in our specific context and in the approach we had taken. I learned that technology became a useful tool only when we started understanding and respecting what was.

### *Hosting and Cultivating Space Online*

Creating time and space is a uniquely humanizing activity. In some ways, when we create our time and space, we create our identities (Owen, 1997, p. 59).

The notion of creating, cultivating, holding or enabling “space” was central to my inquiry from the beginning, as I sought to find and recreate my own experiences of space and aliveness (Wenger, et al., 2002) face-to-face as well as online. I was aware that it was not a physical space or a designed online “room”, but rather an experience, an atmosphere, a combination of social factors or a complex social architecture, which might or might not be designed. The question was “how”.

In order to set the online tables, create “space” and help set the conditions for collective discovery and learning online I needed to continuously look for opportunities to deepen my understanding and awareness of what was going on for the advocacy people. Looking back at my experience and discoveries with the Online Advocacy Café, I see the notion of space with new clarity. What I thought would end up as a thesis with a series of examples of what such space *looked* like online, became much more than that. It became a personal discovery of my identity as an online facilitator. I experienced what it *felt* like to become “totally present” (Owen, 1997, p. 57) and “suspend normal judgements” (Owen, 1997, p. 60) in the process of enabling or cultivating space for aliveness online. I experienced that to really listen, required openness on my behalf to be changed.

Further, I came to a deeper understanding of how challenging it can be in practice to get to a stage of presence and suspension, in particular in a process where face-to-face interaction was limited: “To the extent the facilitator becomes prescriptive, imposing time, space, solutions, he or she will fail” (Owen, 1997, p. 64); and of how the specific context you find yourself in as an online facilitator may increase the complexity of the situation. It is clear to me that the forms or appearances of space online and of online tablecloths are flexible and differ from context to context.

While I discovered my own identity and approach online, I also saw that cultivating and nourishing space was not a one person activity, nor an activity that I could seek to control. I could be intentional, authentic and reflective, but change, discovery and the creation of space ultimately needed to be enabled by and grow within the community or group (Holman, et al., 2007; Lai, et al., 2006; Wenger, et al., 2002). But what was my role as a facilitator then? How could I assist in designing for emergence and enabling space if I gave up control?

Isaacs and Brown (2005) describe the art of simultaneously engaging in intentional design and a natural process for emergence when hosting conversations that matter. A similar balancing act is described in the CoP literature as “the art of balancing design and emergence” (Wenger, 1998, p. 9). For Wenger, et al. (2002) this art is about bringing out people’s or a community’s internal direction and energy and of finding the triggers to catalyze change.

Such emphasis on facilitation as artistry and creative practice seems to much more accurately depict my experience of what was useful and meaningful. If I were to seek any guidelines for my continued practice online and offline it would be to watch the creative flow of a painter, a dancer or a musician, or perhaps even the strength in flow and non-resistance of the martial arts (i.e., Owen, 1997; Senge, et al., 2005). Background knowledge about techniques and methods can be useful, but magic appears only through creative practice, not unlike Cady’s (2007) “art of mastery” (p. 42) or the Art of Hosting community’s portrayal of a “way of being, a way of life, a way of being with others and situations as they unfold” (Art of Hosting, n.d., para.6).

The triggers to catalyze change for the advocacy people were to focus the inquiry on their day to day work, real challenges and dreams. But these triggers appeared most useful when nested in personal connections and relationships. Something changed during the Power Brunch on the Wiki when people experienced a practical example of how the wiki could be a tool for their meetings. But more probably changed, for L, for me and for everyone who read her story, when L was able to express some of the emotions and frustrations of living with the disease in a format which was not only recognizable to others, but also deeply personal.

My experience with the Online Advocacy Café showed me how I had the *possibility* as a facilitator to enable beginnings and support the process, through authentic personal relationships, careful preparation and intentional practice. In Isaacs’ (1999) words, space for dialogue is not possible to manufacture, but I could “set the container” and “create the conditions under which a rich field for interaction is more likely to appear”, “a setting in which it is possible to hear one another and speak safely together” (Isaacs, 1999, p. 242). To move from strategic design to intentional cultivation was a context dependent balancing act, which required a dynamic and creative process of authentic facilitation. In practice this meant,

becoming aware of and suspending my own assumptions and agenda in order to listen, create relationships and discover our common purpose. It meant being present (Owen, 1997; Senge, et al. 2005) and truthful to myself and others: “To stand in the presence of the truth is to understand, in very immediate terms, one’s strength and weaknesses” (Owen, 1997, p. 63).

This notion of intentional cultivation and online space was far away from any linear cookbook recipe of online facilitation (see Owen, 1997, p. 57). Yet, while it was clear that technical expertise was not enough to facilitate such experiences, the facilitator’s awareness, experience and knowledge about the technologies (or potential technologies) in use also appeared critical to secure technology as useful tools. It required some expertise to train people, help select the most useful tools and create what White and Shirley (2007) refer to as a minimal technical structure to secure an immediate feeling of comfort and usefulness when people entered the online environment. However, overall, online space was about human interaction:

This is not an issue of ‘replacing warm communication with cold’. It is two fold: finding our warmth and humanity online, and identifying the mix of online and off-line, enabling people to achieve their goals and fulfill their potential. Embracing the mix of perspectives moves us forward in making wise choices in a world that needs all the wisdom it can get. No technology surpasses a hug, or a shared meal. Rather, it prepares us for finding still more connections that create change. (White & Shirley, 2007, p. 558)

#### *From Doing to Being: Trusting Process, Letting Go*

Practice was central to my process and my discovery. I do not believe I could have experienced the same depth of understanding of the Story of the Online Advocacy Café, had it not been my own living knowledge. My initial inquiry was focused on what I could *do*, but I gradually learned how it had more to do with who I *was*, about being authentic and real. In other words, I went from a question of *doing* to a question of *being* (Owen, 1997, p. 61). As Senge, et al. (2005) describe it, my actions started coming from a source deeper than my rational mind. I was “both engaged and simultaneously detached” (p.91). The resulting expanded awareness allowed me to give up control by trying to impose my ideas on people. By allowing myself and the people in the Online Advocacy Café to *be* real and to engage in a dynamic discovery of purpose, I had started setting the online tables. General guidelines were not helpful for this experience. I could not have experienced this sense of being in a to-do-list for online facilitators: “Unless the facilitator is truly and authentically present, nothing that is done, or not done, will make any difference” (Owen, 1997, p. 62).

It seemed like a paradox that I discovered the possibility of aliveness only when I let go of myself and my own agenda. Yet, in those precise moments, I became human, real and

authentic. I see now that letting go of control and certainty is not the same as stopping reflection on action or of playing laissez-fair. Letting go of control was about trusting the process (Archer, 2009; Holman, 2007) and about allowing for the collective magic or the “magic in the middle” to evolve (Brown & Isaacs, 2005; Senge, et al., 2005). In fact, by starting to fully listen and work with people rather than deciding for them, I remained true to who I was, to my intention and values and to the notion of starting with people rather than with technology. Only, I had not imagined what it would look like in practice, not to mention that the sight was not the “pretty” abstract result that I had envisioned. The Online Advocacy Café was not a glowing best practice example of doing and experiencing all the “right” things at the “right” moments. Fortunately, it was much more real and enriching than that. The wind carried me high, low and backwards before it felt like I was forwards again.

For me as facilitator, it was a practice of living in a dynamic role, where strategic design based on my own agenda was replaced by intentional and reflective cultivation filled with energy and shared meaning. This, at times, meant invisibility, and at other times use of expertise in a trainer role. The point was to be part of the natural flow. Letting the wind carry me through this process was perhaps my biggest challenge. But this was exactly what created the possibility of honouring people’s voices online and of “designing” for aliveness.

### *Small Seeds: Big Trees*

Looking back at the Online Advocacy Café and its immediate usefulness and impact on the organization and its people, the change was perhaps not as instantaneous as originally envisioned by me or even by the President and the Director of Education. Yet, the process and the responses from individuals also indicated how small seeds were planted and how those seeds had the potential to grow, spread roots, blossom and create new seeds throughout the organization. Seeds were planted amongst a larger group who had become aware of other ways of working and of new questions to ask.

What we discovered was perhaps only a snippet of all the possibilities out there. On the technology side, a wiki is far from the only option for collaborating online, and on the people side, it is probably more accurate to say that the exploration was done by a few people, rather than by the advocacy people as a whole. But the fact that we looked at only one online collaboration tool and that not everybody was included does not make our snippet unimportant. I may have wished for larger snippets, especially due to my belief that it is important to engage the whole system. But snippets may also be drops of water that slowly sip through the system and have the possibility to transform us (Capra, 1997; Wheatley, 2006).

As an online facilitator and practitioner looking back at my learnings, I feel at times somewhat overwhelmed by the seemingly comprehensive role of the online facilitator, which neither I, nor the organizations I may work with, are prepared for. What happened to just facilitating an electronic discussion board? I then try to encourage myself to think of my role more as being than as doing, and to know that even small seeds become big trees. That said, my experience highlights the importance of understanding *what people want to do* and *why* online work or technology is chosen in the first place, beyond simply “to connect”. The purpose behind connecting people or creating online community may vary so much that it is impossible to approach it as a goal in itself with a generic set of guidelines. Whether the online facilitator is the person who facilitates the beginning of that conversation within the organization may not be important. What is important is that the conversation about meaning and purpose takes place, that it is located within an understanding of the whole system and that the online facilitator is aware of it.

To put this in perspective we can think about a “non-technical” outside facilitator. An organization would rarely bring in an outside facilitator or consultant without having a specific reason or at least a vague sense that they need help to discover their own context or direction. This vague sense may then be the starting point for common discovery. In contrast, organizations calling upon an online facilitator may already have decided that “online” is the solution and perhaps have skipped the hard work of reflection, self-discovery and common purpose. This may make it harder, but not impossible for an online facilitator, to take a step back and assist the organization in this discovery before technology becomes the goal in itself.

The issue is also what kind of questions the online facilitator called might ask when the focus is on technology to begin with. To be fair, technology may be the starting point, as it was for this organization and for me. It may be what spurs the interest, drives the inquiry or the new business initiative. I have struggled with the questions of whether that means that we have a “lost” case from the beginning. I do not think so. Careful attention, reflective and authentic behaviour and powerful questions may still be useful and help ensure valuable experiences that matter to people.

As well, I realize that more often than not, a lengthy process of discovery informed by one of the large scale methods seminars such as *appreciative inquiry* (Watkins & Mohr, 2001), *the world café* (Brown & Isaacs, 2005), *open space* (Owen, 1997) or *future search* (Weisbord & Janoff, 2000) may not always be appropriate. Rather, when drawing on my learnings from this process, I see an opportunity to ask questions and take time along the way to allow people and organizations to learn and discover what is real for them and their context in an increasingly electronically connected world where working online may both be a reality and a necessity for

many. As an online facilitator, I see it as my honourable promise and responsibility to help people identify through careful attention, practice and experience, the moments for such questions and discovery.

### **Implications, Significance and Authentic Online Facilitation**

#### *An Opportunity*

Bateson (1994) describes learning as spirals of complexities that keep revealing themselves throughout one's life. Revelation comes when we are able to see connections: "The process of spiralling through memory to weave connection out of incident is basic to learning" (Bateson, 1994, p. 11). Sometimes what is learned is only visible through *peripheral vision*, sometimes a familiar pattern becomes visible through contrasts, sometimes greater implications are discovered later. So what may be some of the spirals of learning emerging from my Story of the Online Advocacy Café? What may be some of the visible implications and significance of the seeds planted and what may we discover later? How may I and others find my research useful in their continued practice?

As an online facilitator I have the opportunity to be part of people's experiences of technology as a useful tool for their collaboration, learning and work within organizations. My facilitator approach and care may be central for individuals' and organizations' possibility of using technology as a useful tool. Yet, this opportunity is not exclusive to me. I believe my OD practitioner colleagues, online facilitators and leaders in organizations recognize many of the situations described in my story, and that they similarly have the opportunity to assist individuals and groups in discovering what matters, enable space and aliveness online and set the online tables with tablecloths.

Such opportunity implies that we recognize that working collaboratively online is not just an easy and cheap solution to an organization's challenges. In fact, technology is never the solution, and only a tool if used in the right context. To create space online first and foremost requires attention to people, process and discovery along the way. This may not be substantially different from any offline processes. Indeed, with the Internet being a more integrated part of people's everyday experiences (Wellman & Haythornthwaite, 2002), it may often be more useful to look at the process, the collaboration and the learning as a mix of online and offline. Yet, when working online, it appears as a larger facilitation challenge to ensure that the process always starts from where people are and that people drive the change. It requires an ability to remember that technology is not an end in itself, and at the same time to balance this with a special attention to and leadership in selecting tools and helping people feel comfortable with those tools. As learners, practitioners, facilitators and fellow humans, we face

an important opportunity to ensure that nobody feels lost and that multiple generations and a diversity of people and cultures have valuable and useful experiences online.

My research points to the need for a deeper or more nuanced understanding of the notion of “technology fear”. When I really listened and started to know the advocacy people, I saw no technology fear. Instead I saw a group of individuals with their unique challenges in life, who were keen to use any technology they experienced as useful in their context – but only to the degree it was useful, relevant and personal. I also saw that adjusting my perception of training to the needs of this particular group of people and individuals was crucial. I believe this understanding is an important starting point for any conversation about technology in organizations.

Organizations and organizational leaders keen to explore the opportunities in working and collaborating online must thus be willing to support a dialogue and a process of discovery about what is real for people in the organization as a whole. This requires courage, since it may be far easier and more in line with conventional methods to focus on short term “results” and the cost-benefits of implementing a new technical system in the hope that it changes behaviour and has an immediate impact on the bottom line. Yet, as this thesis illustrates, learning and change is a long term process (Senge, 2003); it is personal and may often appear to be hard work (Archer, 2009). As Wheatley (2009) suggests, it requires a willingness to be disturbed.

Similarly, learners, practitioners and researchers need courage and a willingness to be disturbed. We need to be honest with ourselves, our limits and aspirations. And in the often challenging process of learning and reflection, we need to trust that learning and change start with ourselves and is a worthwhile process. We are all explorers and discoverers in our unique way. In turn, perhaps the courage and important conversations initiated in organizations, amongst learners, practitioners and researchers have the potential to plant seeds of inspiration amongst funders. If so, it is my hope that future funding would increasingly be based on stories connected to learning, value, hope and inspiration with or without online technologies as tools, rather than on the extent of use of online technologies.

### *Research Implications*

This thesis has been an example for me of the value of a research project located at the threshold of theory and practice, of academics and practitioners. I have appreciated the opportunity to step back, reflect on action, research my topics and find inspiration in academia. This process has helped me in my continued growth as an OD practitioner as well as a researcher. Theory has complemented my understanding of practice, while practice has made theories personal, alive and personally relevant. This dialogue has not only been useful to me,

but also has the potential to inspire others, as I share it as a researcher and practitioner. I thus believe practice and academia have much to contribute to each other and hope that other OD practitioners and online facilitators will also find opportunities to do practitioner research and contribute their real life experiences to this growing field.

Based on what I have learned on my thesis journey, it might be interesting to focus such practitioner research more on the notion of authentic online facilitation and on experiences of how it may be possible for an outside online facilitator to nurture learning and collaboration online and help people discover what is real for them. This might be particularly interesting and relevant if the facilitator was in a role of limited duration or scope. Being able to trust the process and letting go of control while simultaneously balancing intentional design with emergence seems particularly relevant here.

As for contributing to published research, I hope that my example may encourage a more candid approach to writing about how much can be learned from our “non-best practice” stories, projects and research studies. As I experienced during my search for related literature, guidelines for success or best practice were inspirational, yet, did not really tell the full story of what appeared to be the experience of several learners and facilitators, myself included. On the contrary, it often felt alienating not to be able to measure up to what seemed to be perfect job descriptions for online facilitators. I could not help but wonder how everything I read “got it right”, while this certainly was not my experience of practice. Personally, I found it much more enriching to hear about people’s challenges, questions and discoveries along the way. In the end, this was what made *my* journey meaningful. I will elaborate more on this below.

### *Real Life Research and The Field of OD*

As I have lived through my experience in this research process, I have surely noticed that it is not a best practice success story that may leave everyone marvelling at this stellar example of online facilitation. It is a personal story of my challenges, reflections, questions and learnings as the project unfolded. Although there are times when I wish I could always provide admirable stellar examples, this case is the story of a project that could perhaps have been done a lot better.

Sometimes it is hard to be that honest with yourself. I was often tempted to forget about the whole thing and look elsewhere to more “successful” cases for answers. Yet, the sense of responsibility to the people I had worked with combined with a vague personal sense that perhaps I did not yet see the whole picture, led me to embark on new rounds of reflection on both what had gone well and what had not, and why. This was when I discovered multiple layers of learning embedded in my story. This was when I saw that my original question had

taken a new shape and that it offered me unanticipated answers and new questions, which had the potential to inform my practice as an online facilitator in the future.

I also gradually saw how my “mistakes”, my challenges and my learnings were perhaps quite similar to those faced by other facilitators. Perhaps “mistakes” had the potential to elucidate even deeper learnings than “successes”. Perhaps my honesty and reflections could provide a greater opportunity for others to recognize themselves. Perhaps my research offers others a chance to reflect on how they approach or had approached similar situations. Perhaps surfacing and reflecting on the learning that emerged from this kind of experience would actually get me a lot closer to an answer to my research question. Best practice studies were helpful for inspiration. Yet, as real life practitioners, it is important that we are aware that “best practice” may condition research to look *only* at successes. It may paint a portrait of the researcher and practitioner as always being the expert and always getting it right. As a practitioner, focusing exclusively on the successes of experts may not only be personally alienating, but also only tell part of the story.

Remember the chit chat in the yoga studio? Remember my intention and the rhythm of my own breath when getting into a new pose? The strength of this research lies precisely in the power of my intention followed by reflection on action throughout the thesis. Rather than depicting a perfectly mirrored result of an ideal, it has been a real life experience. I believe that the field of OD may benefit greatly from this type of research and stories of real life experiences, challenges and reflection. A personal story honestly told with all its ups and downs creates space for conversations and reflections. As OD practitioners, being human, reflective and authentic is an important part of our espoused values. Practicing those values makes us whole.

When I look back at the process, everything that happened told me something about the group. Telling my story as I experienced it has given me the opportunity to avoid excluding certain data in order to “prove” my hypothesis. It has taken time to discover and understand. It has taken a willingness and openness on my behalf to be changed. I believe this is the true value and freedom of this type of qualitative research. My thesis is not the one “objective truth” ½ about what happened, but it is my whole story.

I believe my thesis shows how the dilemmas between planning, controlling and finding proof and measurement on the one side and flowing with the process to let it evolve as it needs to on the other, are indeed relevant to anyone interested in facilitating the emergence of CoPs in an organizational context. Often, practitioners or consultants may feel caught between the pressure to perform with measurable results in the short term, and a perhaps more challenging and fuzzy process, which they know will be more beneficial and enriching in the long term.

Additionally, the practitioner's knowledge versus the researcher's knowledge can often seem to be in conflict, even when experienced through the same person. It is a challenge for any practitioner to translate theory conceived in the academy to daily practice, just as it may be a challenge to become reflective about one's practice in a more theoretical sense.

Thus, like most qualitative research, what has emerged from the research is not idiosyncratic to me or to this specific online community. My experiences and reflections during the research process have indeed allowed me to find some room for enabling the emergence and aliveness in online communities, collaboration and learnings and to "design" for something, which by definition is not designed. Although this experience took place in the voluntary and informal context of a CoP, I also believe it can serve as inspiration to more formally structured virtual learning teams and facilitators. I hope that this thesis may be the opportunity for increased dialogue and reflection to better understand some of the complexities involved in initiating and nurturing learning and collaboration online. I hope that it includes recognizable elements and perhaps even cause inspiration for setting more meaningful online tables and hosting richer experiences of online tea parties.

With every closure there is a new beginning. This is only the closing circle of my thesis. The understandings, ideas and inspiration fostered in this last cycle represent new beginnings for me in my continued practice. It is my living knowledge carried forward by the wind. "Go where wind takes you", "the wind to carry you forward will find you when you are ready" (Wheatley, 2009). I hope my readers might take any seeds they may find useful and carry those seeds with them to nurture, in their way, in their own lives and practice as learners, facilitators or leaders online and offline.

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