INTRODUCTION

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

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

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

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

WHY USE ELECTRONIC CONFERENCES?

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

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

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

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

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

- keep a permanent record of discussions that you and your students or colleagues can refer to at any time. You can print a hardcopy of discussions that interest you most, instead of taking notes.
- allow shy people or foreign participants to express themselves more easily. Conferencing offers these individuals an opportunity to fully participate.

- help individuals develop critical thinking and communication skills.

GETTING STARTED

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

1. SET WORTHWHILE GOALS

Some examples of conference goals are:

- to extend valuable classroom or work group discussions.

- to allow for role-playing.

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

- to help students develop critical thinking and communication skills.

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

- to allow colleagues to discuss projects between meetings.

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

2. PLAN FOR ACHIEVING GOALS

For example:

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

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

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

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

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

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

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

4. ACQUIRE TECHNICAL TRAINING

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

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

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

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

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

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

6. SET BEHAVIORAL NORMS

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

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

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

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

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

- MUTUAL TRUST AND RESPECT

  INDIVIDUAL DIFFERENCES AND FREE SPEECH: Encourage your students or colleagues to respect everyone’s right to an open and hospitable computing environment. It’s very important for all conference participants to be sensitive to special needs and characteristics of others that arise from differences in gender, race, ethnic or religious background, or sexual orientation. It’s vital that all participants avoid discrimination or harassment of others on the basis of such differences.
See the section "Resolving Problems Quickly" in this guide for what to do if serious problems arise.

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

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

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

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

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

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

You may want to make it clear to the participants that it is relatively simple to discover the true identity of a pseudonym user. Contact Bob Parnes for information on how to do this. Keep a record of CCID assignments. If you suspect someone has registered under a pseudo, you can check the participant list. Confer will add an exclamation mark (!) to all pseudonymous items, responses or messages,
which is helpful when the pseudonym used is the name of a real individual. This flag does not appear on pseudonymous registrations.

- COMMON GOALS

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

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

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

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

KEEPING THINGS GOING

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

1. STAY INVOLVED

- Plan to sign on at least several times a week.
- Keep items prepared to insert in case interest starts to drop off.
- Participate yourself by entering items and responses. This is the most effective way to let participants know you’re paying attention and that you’re serious about the expectations you’ve set.

2. KEEP IT FUN

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

3. RESOLVE PROBLEMS QUICKLY

- PROBLEM PREVENTION
You can head off a lot of disruptive or inappropriate behavior by setting norms clearly up front, and by providing written notice of expectations in the conference. If you have disallowed the use of pseudos, Confer allows you to enter a response "hint"
that will be printed each time someone begins a pseudonymous entry. The text of the hint can notify participants of the rules and inform them of the consequences of violating them (e.g., loss of access, loss of ID, poor evaluations, etc.).

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

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

  **Options for handling people:**

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

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

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

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

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

  - Harassment or discrimination in a course conference may be considered a violation of your department’s code of academic conduct and a violation of the University’s anti-discrimination codes. You may want
to refer the problem to your department for further disciplinary measures.

Options for handling material:
- Enter a response condemning the entry.
- Freeze an item.
- Retire or delete an item or response.

CONCLUSION

The University of Michigan is currently one of the few educational institutions that offers its students, faculty, and staff the opportunity to participate in electronic conferences. An electronic conference is an excellent tool to support a wide range of activities, and with adequate preparation and effective organizing, it can be a successful and enjoyable experience.

GOOD LUCK!