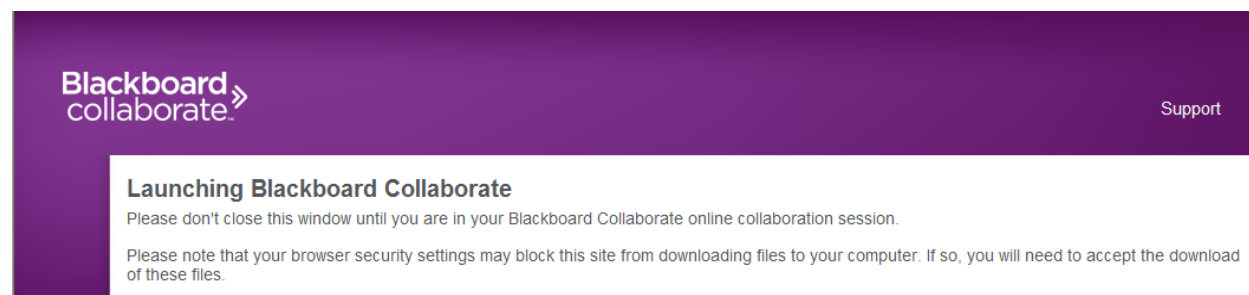


# A Guide to Online Action Learning

This Guide explains how you can conduct action learning sets online using Elluminate Live! (now branded as 'Blackboard Collaborate').

## A note on names...

During the course of the project Elluminate Live! – the software that we used to support online action learning – was taken over by Blackboard. The initial screen now refers to Blackboard Collaborate.



Thereafter, in mid-2011 at least, the pages appear as Elluminate. We have therefore stuck with Elluminate for the body of this Guide.

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## Overview

Elluminate Live! allows groups of up to six people to hear each other and see each other using their computers and webcams. This lets you run groups when the members are many miles apart. These groups can be of many different kinds. Our focus here is on action learning sets but if you read these notes you will also be well on the way to being able to run meetings or coaching sessions or webinars.

Our expectation is that, if you decide you want to go further into this, one of us – that is either Alan Maddocks or Andy Wilson – will be helping you (remotely) to get into Elluminate. So when you have worked through Section 1 please contact us so that you can start using Elluminate with us.

This guidance contains six linked sections:

1. Getting started with Elluminate
2. The features of Elluminate
3. Using the “Three for free” version
4. How to work in an online action learning set (Guidance for set members)
5. How to facilitate an online action learning set (Guidance for facilitators)
6. Evaluation Report on the DALEKS Project \*

\* *The DALEKS (Desktop Action Learning: Experience, Knowledge & Skills) Project 2010-2011 involved pilot implementations of action learning using Elluminate Live.*

They are written to be read in order but you may prefer to have a look at the Features of Elluminate before Getting started. It's up to you.

We'd welcome any suggestions for ways of making this guidance more helpful.

The Guide is based on the current (May 2011) version of the software. Any future changes may affect details within the guidance offered.

## **Section 1 – Getting started with Elluminate**

### ***Introduction***

Elluminate! Live lets several people talk to and see each other at the same time, using the internet, their computers, a webcam and audio.

This section tells you how you can set up your system and get started.

By the time you complete the stages described in this section you will be in a position to join a group of people online and move on to making use of the features of Elluminate which are covered in section 2.

### ***Numbers and Licences***

There's a free version of Elluminate that allows two or three people to work together. (Section 3 provides advice on how you can access this.)

Another version has a maximum of six simultaneous audio and video feeds. This one requires a host with a licence, but the other users don't need any special software.

Elluminate and Wimba, one of its main competitors, have now been bought by Blackboard. So don't be surprised if you see references to them on some of the web pages.

### ***Other Options***

Elluminate is not the only software that can offer these features. For instance Skype allows three or more people to connect using both audio and video but this service is now charged for.

For other options you should talk to your institution's e-learning people. Asking them what your equivalent of Elluminate is should get the conversation started, or show them this Guide.

A key issue for anyone wanting to use this sort of software for group-work is the number of simultaneous audio and video feeds. The licensed version of Elluminate allows six people each to hear and be heard, and to see and be seen. If you have more users than this you **can** manage, but you will need to swap the video and audio feeds around amongst the users, and this can be messy. The advice for online action learning (OAL) is not to have more set members than you have simultaneous audio and video feeds.

## ***Webcam and Headset***

You will need a webcam, unless your computer has one installed. They're all different so this handout doesn't cover setting them up. Perhaps surprisingly, when problems do occur they are more likely to be with audio than video.

The market is constantly moving, but our webcam recommendation has been the Logitech Webcam Pro 9000 HD at around £40. This has a built-in microphone, but see below.



You may have a combined webcam and microphone, or a laptop with a built in camera and mic. If you do then by all means try it using them, but we have found that using a headset (headphones and a microphone combined) can reduce the chances of unpleasant audio effects such as “howlround” or echoes.

For a headset we recommend one that uses a single USB connector rather than separate jack plugs.

Elluminate offers an Audio setup wizard that will allow you to check that your microphone and headphones are working properly. You may need to use this to make sure that your computer is using your headset as the input and output device.

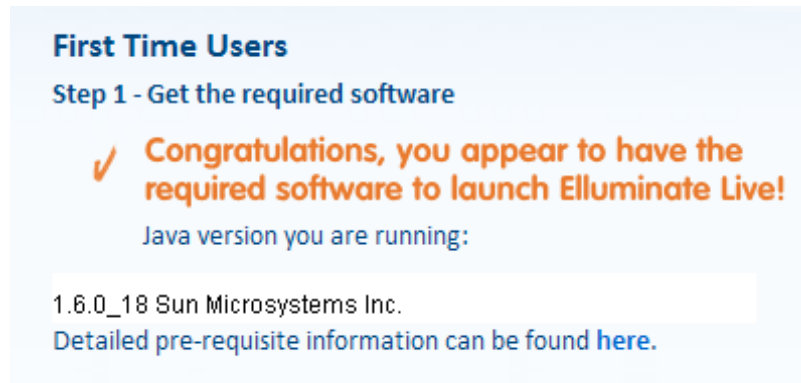
## ***Getting Started with Elluminate***

There is an Elluminate support page that allows you to check whether you have the right software on your machine, and to test your connection, settings, and configure your audio. You can't test your video here, but the software that came with your camera or computer will allow you to do an internal test. We'll help you with the video when you're ready for this.

Start with Elluminate by going to...

<http://www.elluminate.com/Support/?id=62/>

The page will test whether you have an up-to-date version of Java. If you're lucky you'll see this message...

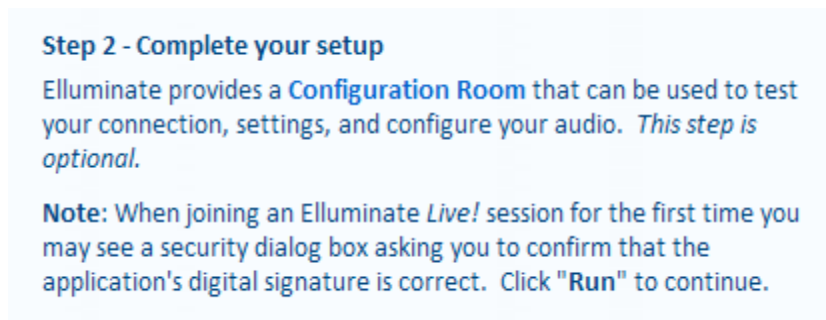


If you're unlucky you will be asked to download an up-to-date version of Java. It is safe to do this but it is possible that you may need technical help.

If you're using a Mac you may need to approve the use of an Applet.

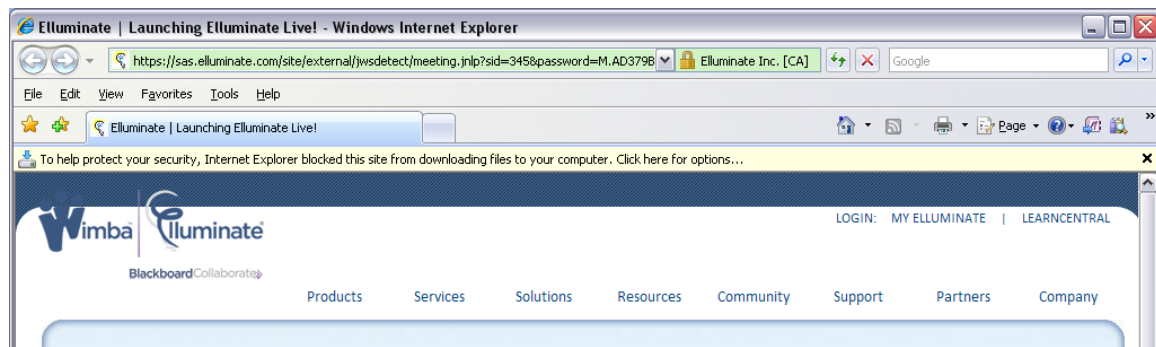
At various stages in the process you may need to approve downloads to let the system work. We've noticed that this can sometimes take a while on a Mac.

To complete your setup go to the Configuration Room referred to here...

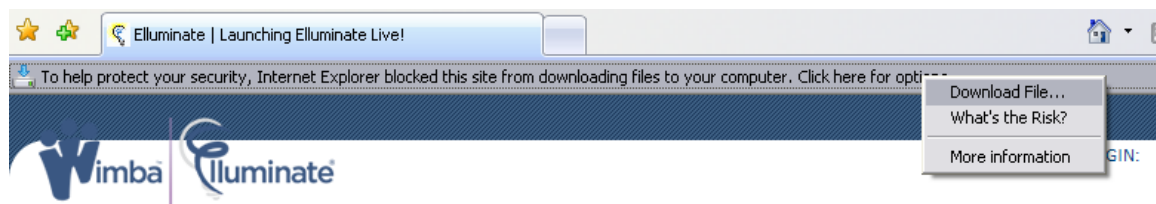


Note the final instruction to Click "Run" to continue

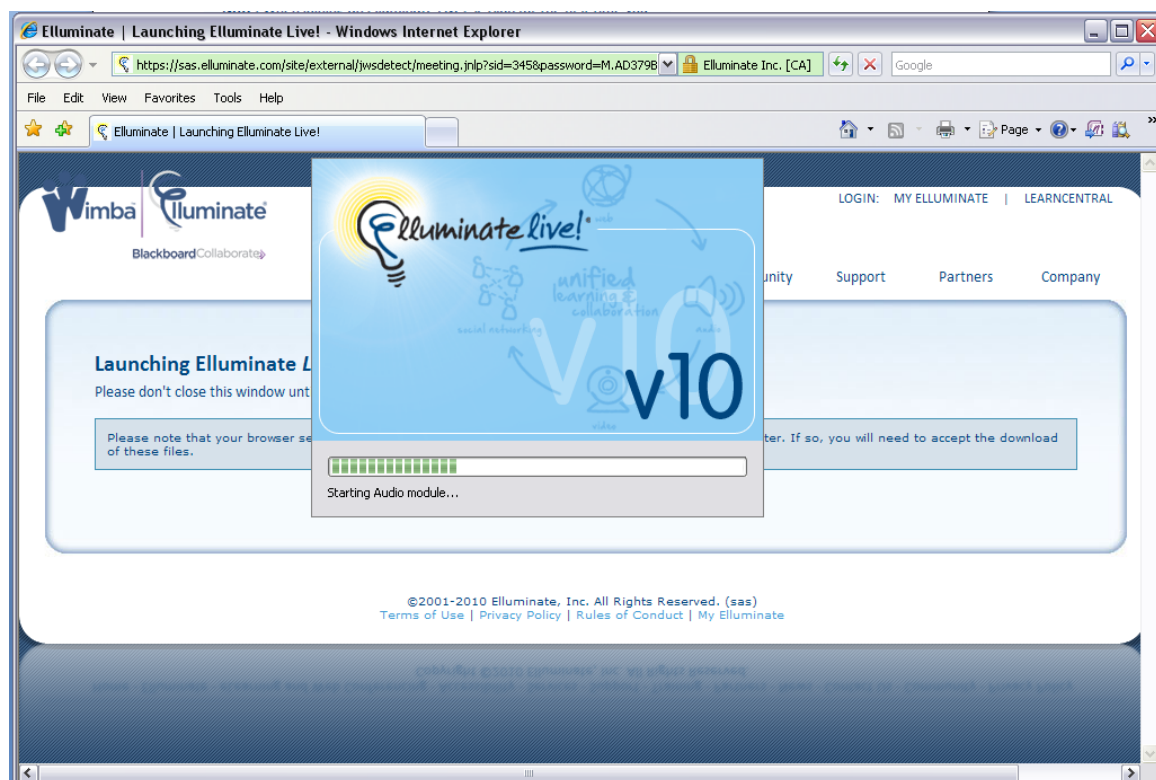
As suggested in the Note you may get a security warning. In Internet Explorer this is a yellow band towards the top of the screen.



Click on Click here for options... and then choose Download File...

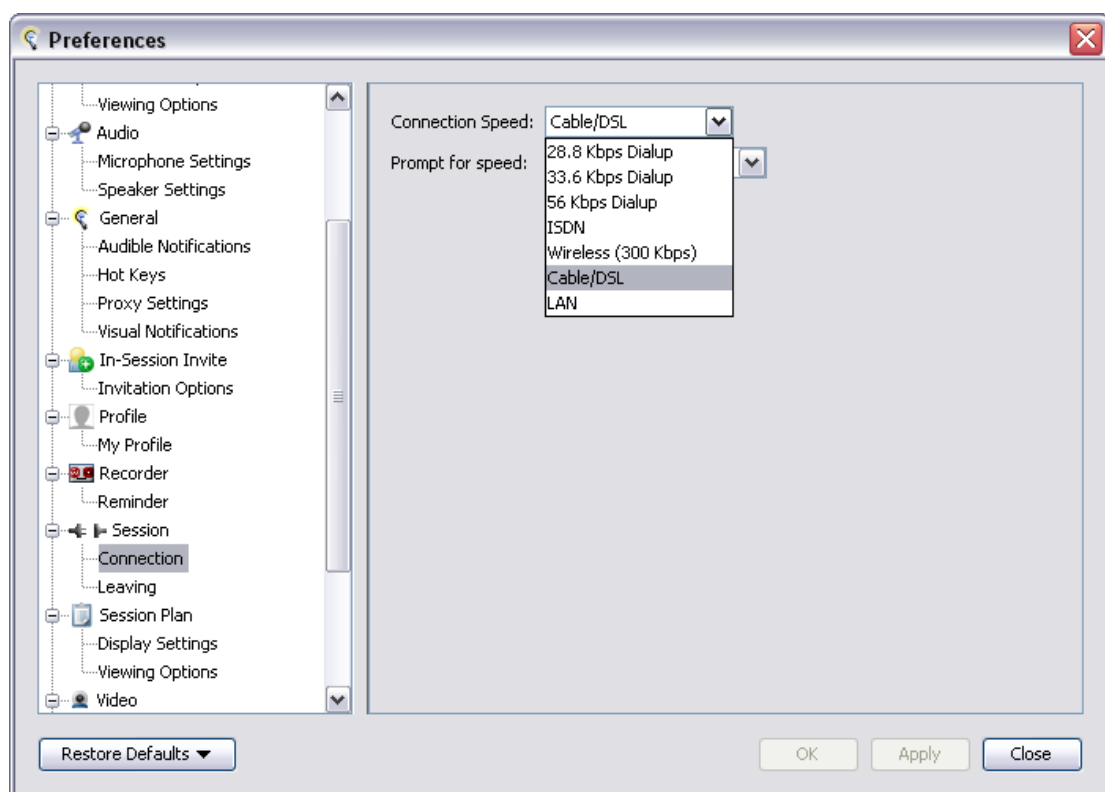


Elluminate Live! will then start to load various modules and you'll see something like this (not necessarily with the same v10 version number)...

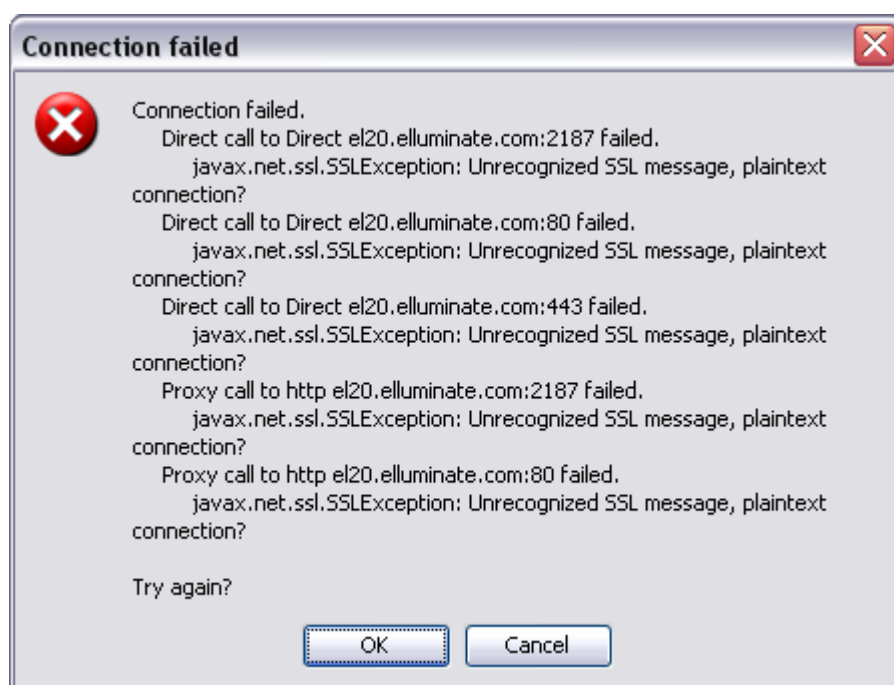


You're now on your way to the Elluminate page but you may be asked to select a connection speed. Most people will need Cable/DSL but there is a wireless option too so choose that if appropriate. We don't generally recommend wireless, but some users have no problems at all with it.

If you want to try different connection speeds you can change your setting later from within Elluminate using Tools > Preferences > Session > Connection.



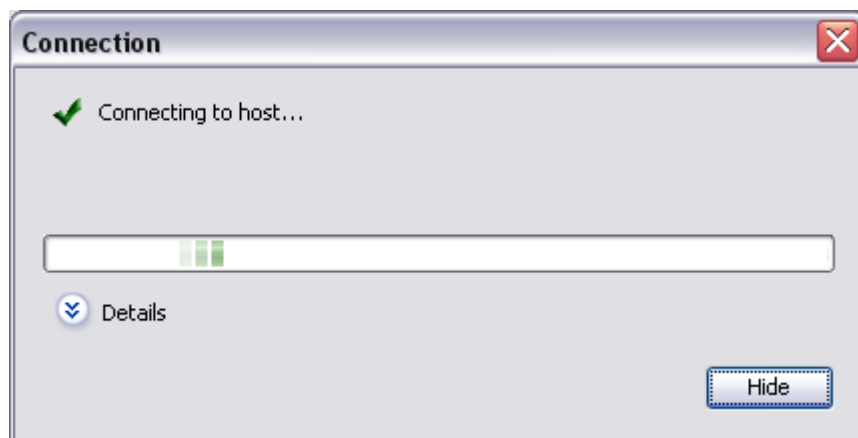
You may also get a Connection failed message like this.



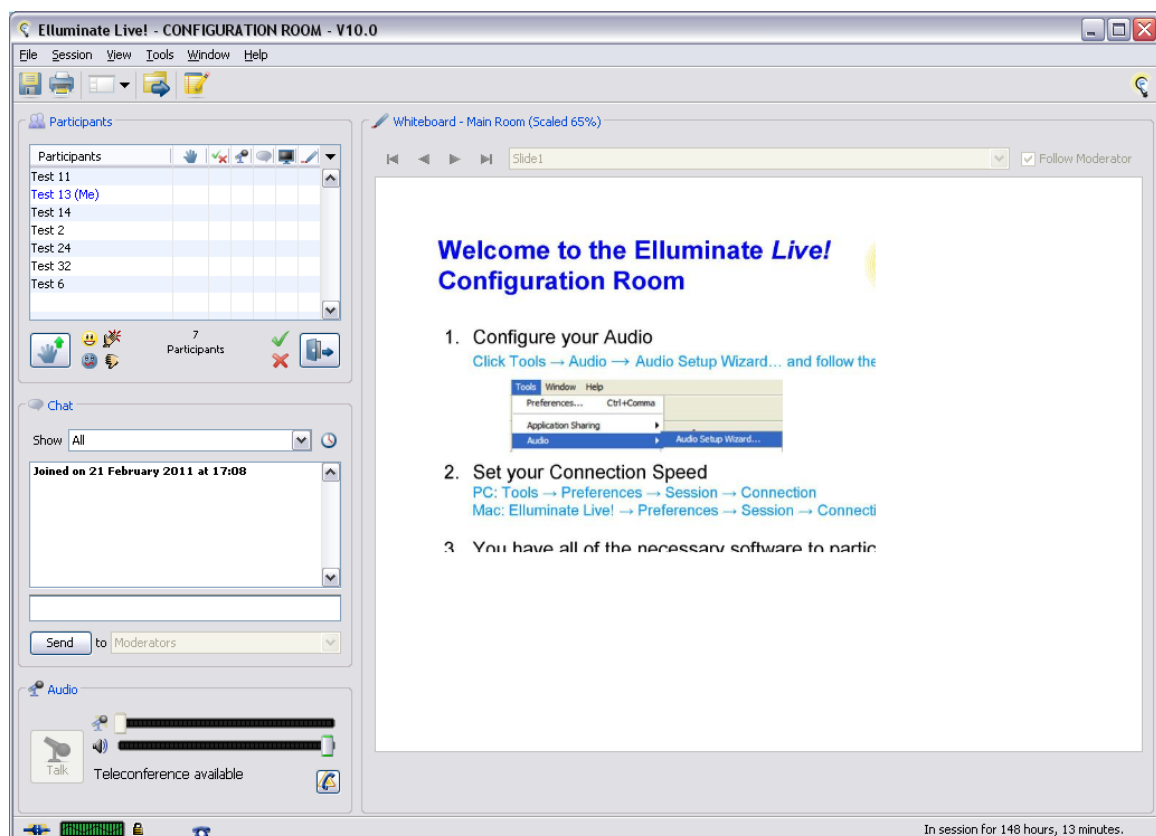
If this happens, don't worry.

Just click on OK and the process should continue.

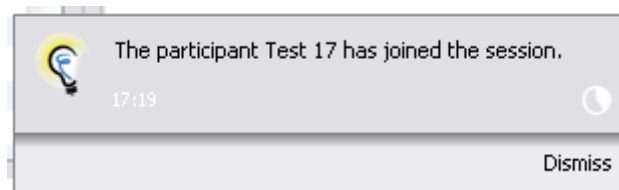
You will then see this...



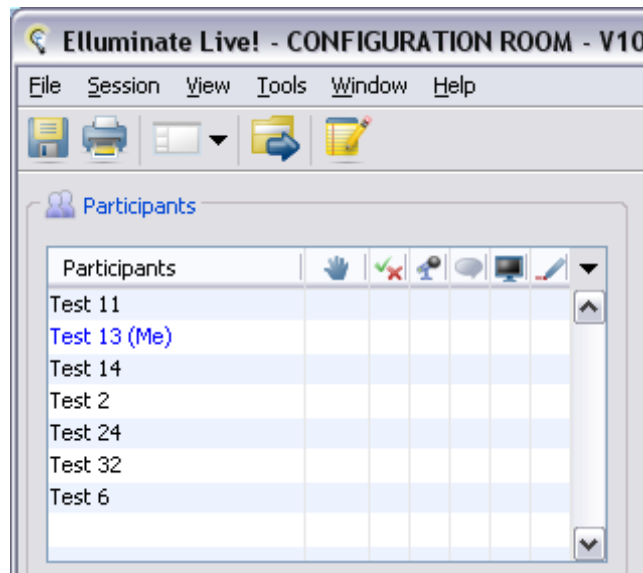
...and eventually this...



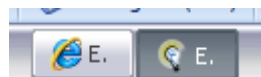
The Participants panel, top left, shows who else has entered the Configuration Room for testing purposes. In this case I (one of the authors of this guide) have just come in as Test 13 (Me). Other users may enter while you're in this room, in which case you'll see messages announcing their arrival.



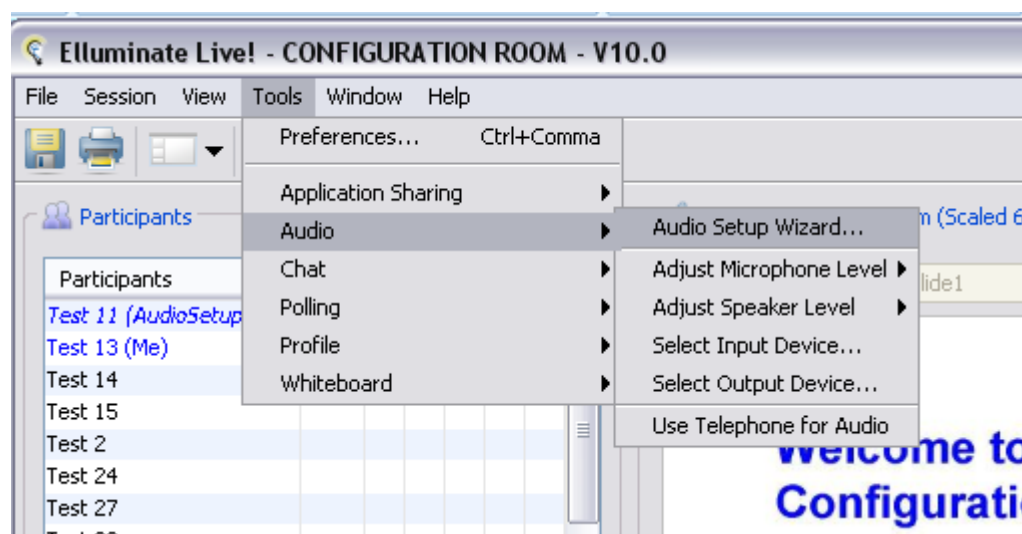
You can't talk to them; this is just a setup page.



It's worth noting that the Elluminate window is not an Internet Explorer page and that it can be accessed by clicking its own icon at the bottom of your screen. The one for Elluminate is the 'light bulb', the one on the right.



To test your audio ... make sure that everything is connected and then use Tools > Audio > Audio Setup Wizard... on the Elluminate screen.



You will be taken into speaker and then microphone setup windows. Work your way through these.



You may have to choose an input or output device. If you are using a headset then the name of this device will appear and you should select this.

If either your headphones/speakers or microphone fails to work then first check the connections. If that fails then get some technical help.

## ***Now you're ready to use Elluminate***

At this point you're ready to use Elluminate. Please contact us to tell us that you're ready to go.

What will happen now is that Alan Maddocks or Andy Wilson will set up an Elluminate room and send you its URL. The full form of the URL is quite long, something like this...

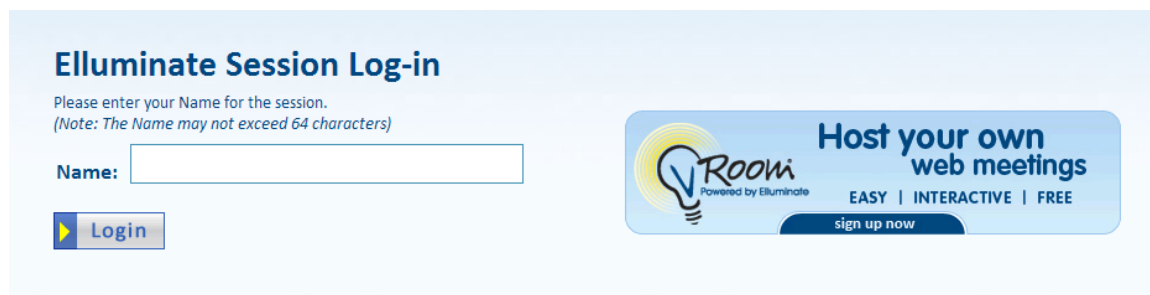
<https://sas.illuminate.com/m.jnlp?password=M.F33F91C45599D1C618E8BE16ED841&sid=2010168>

... so we will probably send you a shorter version that will look something like this ...

<http://miniurl.org/AMpractice>

This URL will give you access to a "room" for a particular time period, so you will also be sent the timings when the room will be available for use. Then, once the room is open, you just click on the URL and much of what you have already seen in Section 1 will happen again.

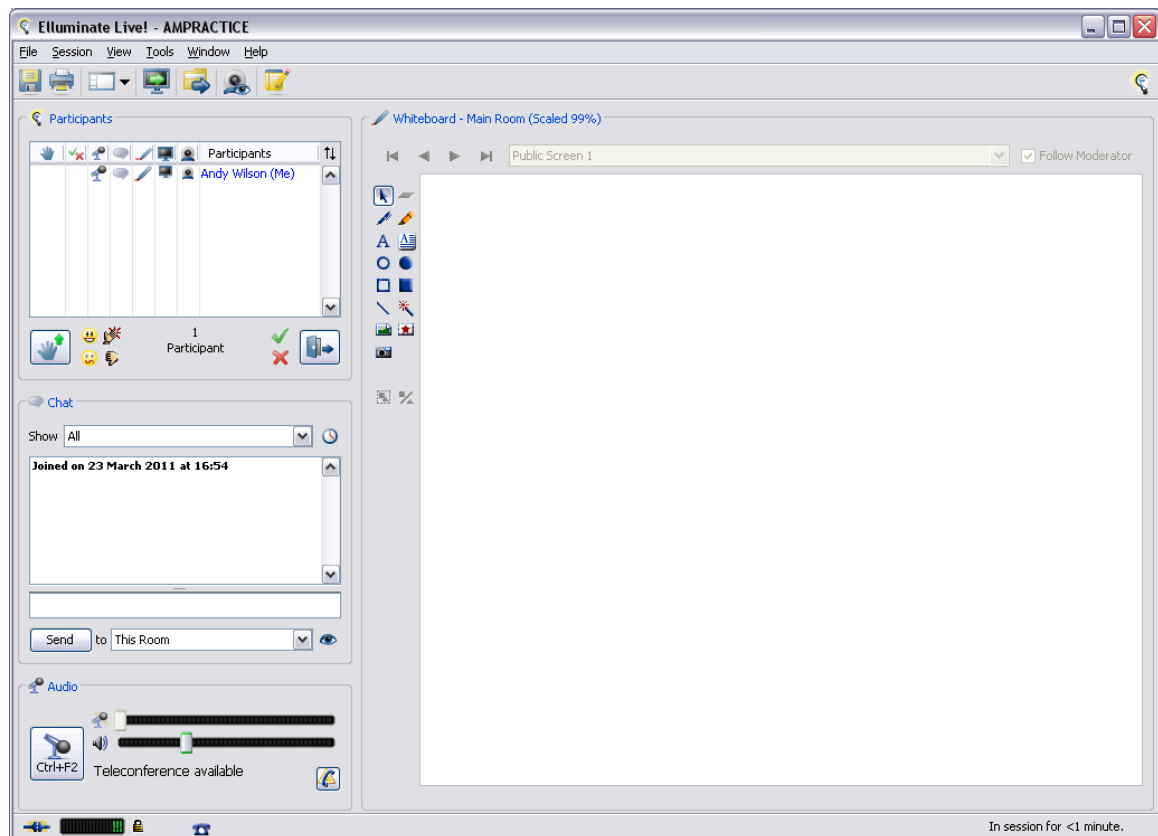
A key difference, because you will now be entering a proper Elluminate room, is that you will be asked to login at this window...



What you need to do here is just to type into the box the name by which you want to be known during the session. This name will appear in the Participants box on the Elluminate page.

On the right you can see the link to the free-for-three version of Elluminate.

Eventually you will see the following screen, and at this point we're ready to look at the features of Elluminate in Section 2. Alan or Andy will meet you in an Elluminate room to demonstrate them to you.



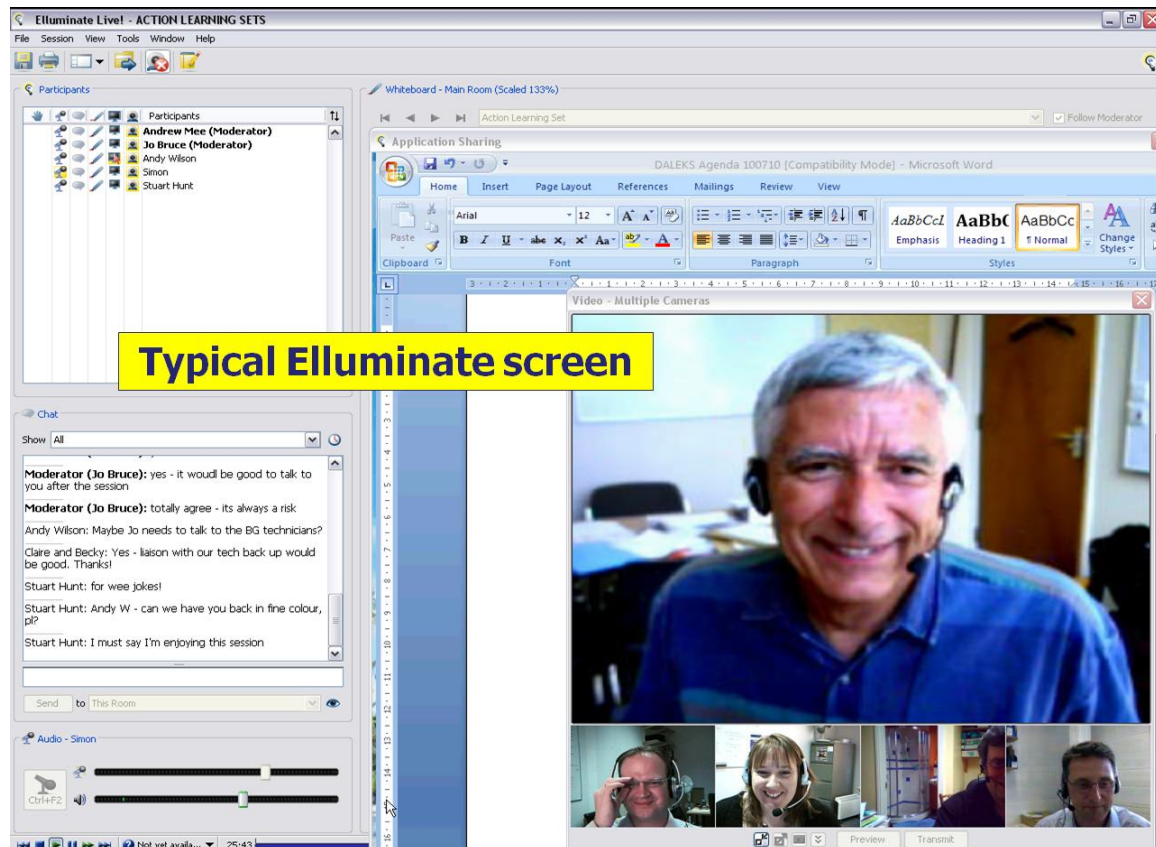
## Section 2 – The features of Elluminate

### Introduction

This section introduces you to the features of Elluminate. We've found that the best way to familiarise people with them is to do it during an Elluminate session. So Alan or Andy will talk you through these features online.

### Typical Screen

Here's a typical Elluminate screen when a group of people are working together...

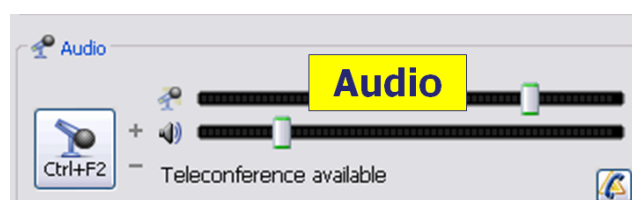


This is taken not from an action learning set – because of confidentiality – but from a meeting of the project steering group for the DALEKS Project.

We'll now look at each of the components in turn, starting with audio and video.

### Audio Window

This is located in the bottom left-hand corner of the screen and it lets you control the levels of your microphone and speakers. The icon on the left lets you switch your microphone on and off. Here it is pointing down and hence is off.



Click on the microphone button to turn it on and off.

## **Video Window**

This window displays the images of the participants, including you yourself. It will not appear when you join the Elluminate room; you need to switch it on.

You activate your video window by clicking on this icon...



This should kick your webcam into life (it's best not to have your camera running already).

Clicking on the Preview button at the bottom of the window will show an image of yourself, clicking on the Transmit button will share this with the other users and you should see something like this...



Clicking on a small image will make it the large one.

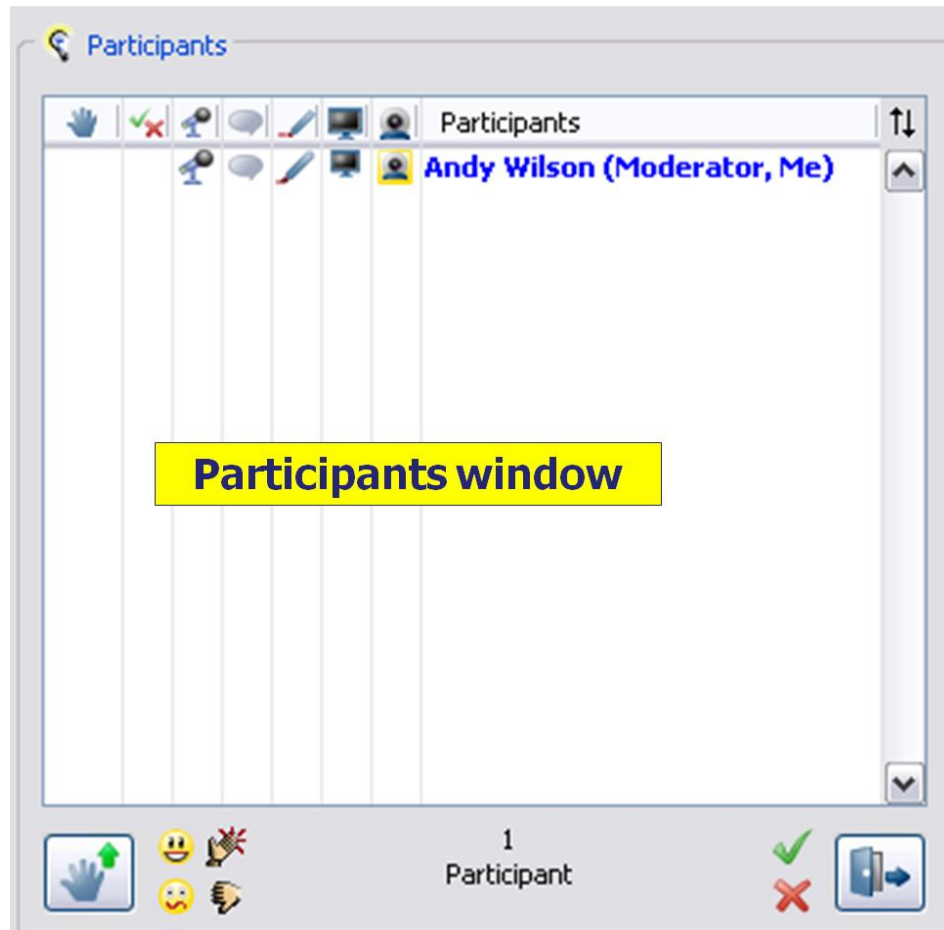
## ***Participants Window***

This shows who is in the room, and what their status is in relation to a number of Elluminate features...

This (see next page) just shows Andy Wilson in the room, and he has Moderator status.

Moderators have some control over what other users can do – such as switching their audio and video off and on, allowing them to chat, and giving them Moderators status.

Moderators come into the room using a different URL.



The icons along the top will be demonstrated in the online session. Hover over them to see what they do.

In this image they indicate, from left to right, that:

- Andy has not raised his hand or used an emoticon (the hand icon column)...
- ...or voted (the tick and cross column)
- his microphone is not switched on (no yellow background to the icon),
- his chat (speech bubble), whiteboard (pen), and sharing (screen) rights have been enabled
- his video is on (see the yellow background behind the webcam icon)

The icons that will appear in the two left-hand columns are triggered by their counterparts at the bottom of this window. Hover over them to see what they do.

The door icon allows you to leave the room for a while – this is indicated in the Participants window – though audio and video still operate.

## ***Chat Window***

This is what it says on the tin. It lets you chat.

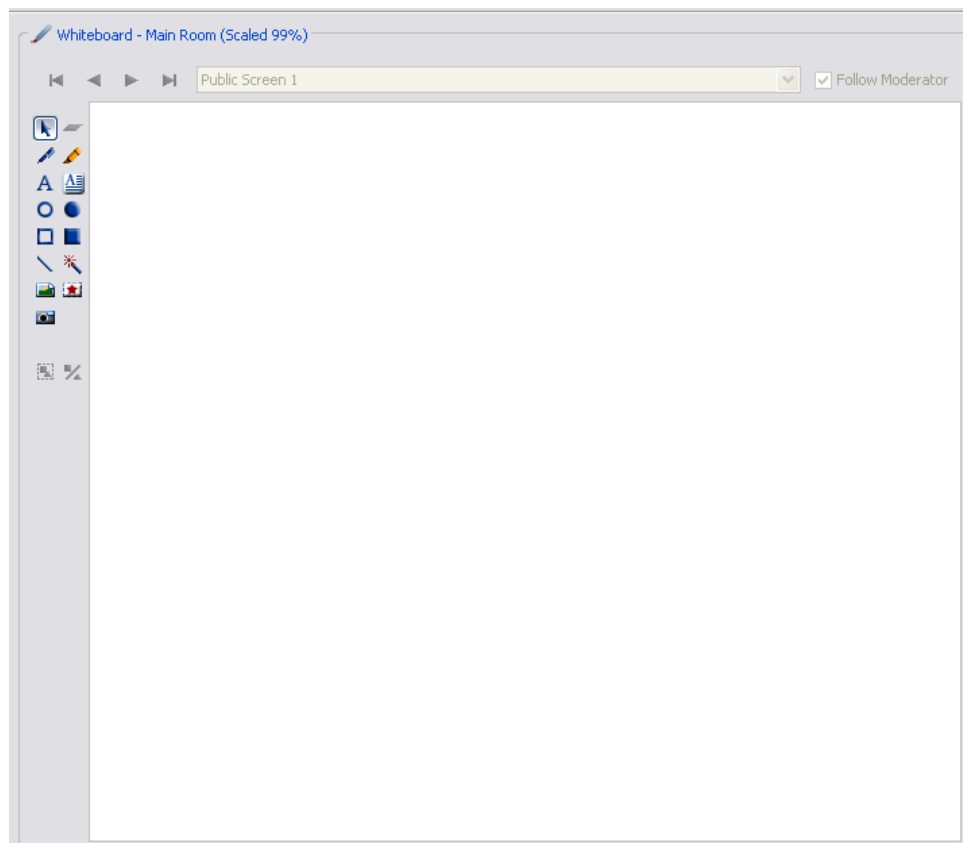
Chat messages can be sent to the room or to individuals. The Moderator will normally set the room up so that they can see all messages.

The ability to chat sounds very strange in an action learning set but it can be surprisingly useful. (More on this later in Sections 4 & 5).



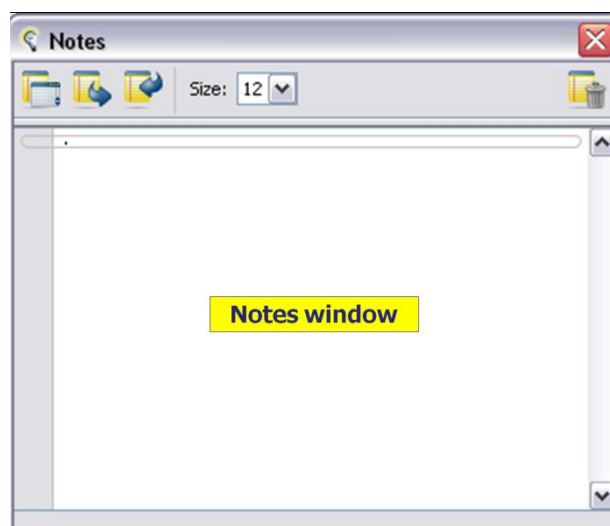
## ***Whiteboard***

This lets you share notes or draw sketches, etc. Play around with the buttons on the left – hover to see what they do.



## ***Notes Window***

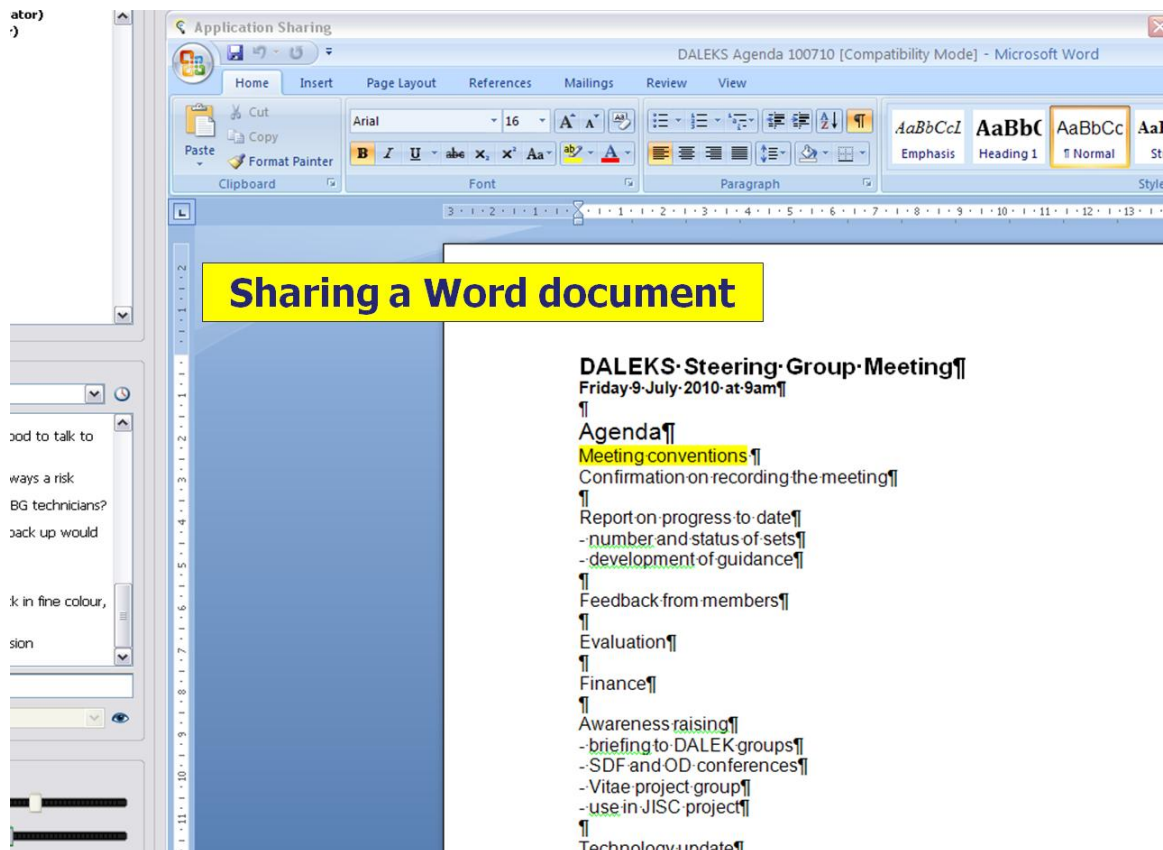
This...lets you take notes! They are saved from one session to the next and you can import or export them. Hover over the icons to see.



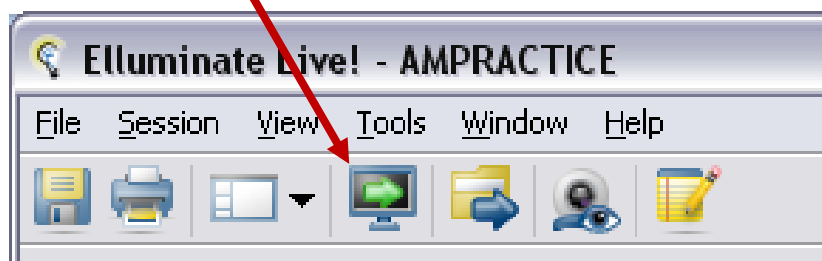
## ***Application Sharing***

And finally, you can share what's on your screen.

Here's a Word document, the agenda for the meeting.



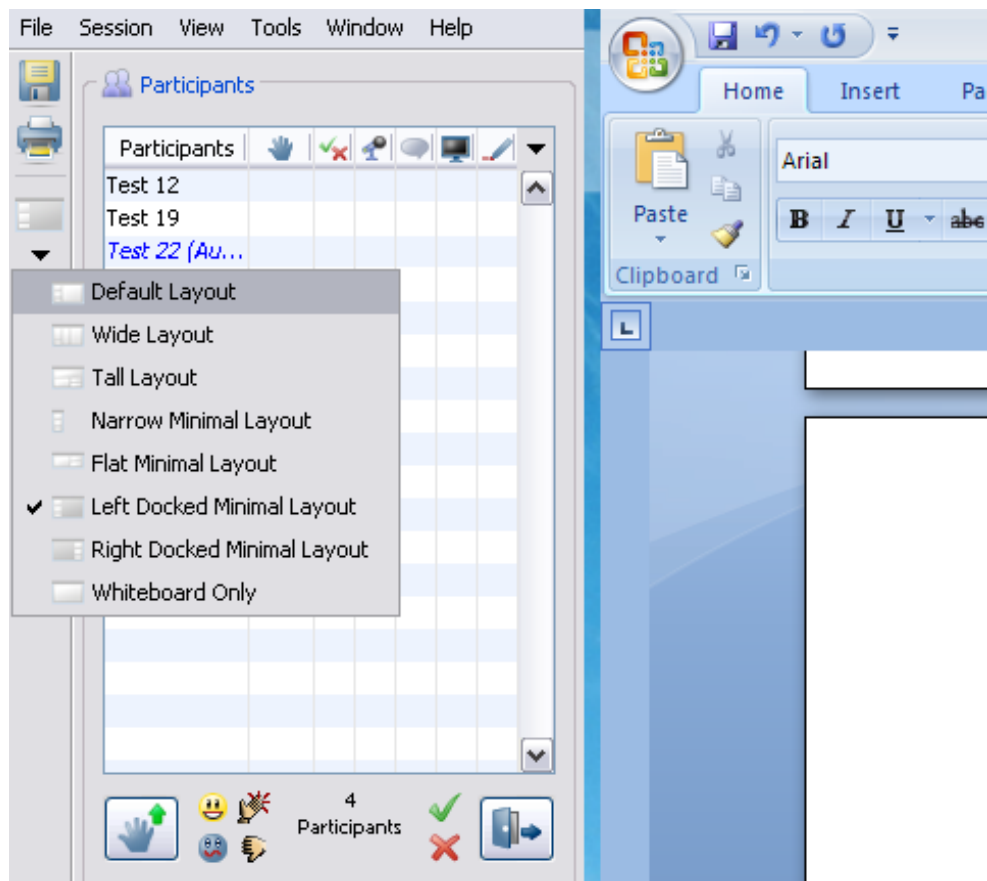
You activate this by using this icon...



This will open a list of those applications that are running on your machine. Choose one and it will be displayed.

This will also change the layout of your Elluminate screen to create space for your application. To get back to what you're used to use the Layout button - which is probably now aligned vertically in the top left-hand corner like this – and choose Default Layout.





And those are the main features of Elluminate.

The tricky bit is using them in ways that help the group to function. This is covered in Sections 4 and 5.

The next section tells you how you can use the free version of Elluminate.

## Section 3 – “Three for Free”

### Overview

Illuminate V-Room allows you to use a free version of the Illuminate software to arrange and conduct online meetings - using audio, video and other modes - with up to two other people. This makes it a cheap and accessible means of using Illuminate, for coaching or mentoring for instance, or for finding out for yourself what the full Illuminate package can offer ... To register and set up a meeting using Illuminate V-Room just follow the steps below.

### Step 1

Type in the following URL: [www.getvroom.com](http://www.getvroom.com) and you will be taken to the following web-page where you can register for this FREE software:

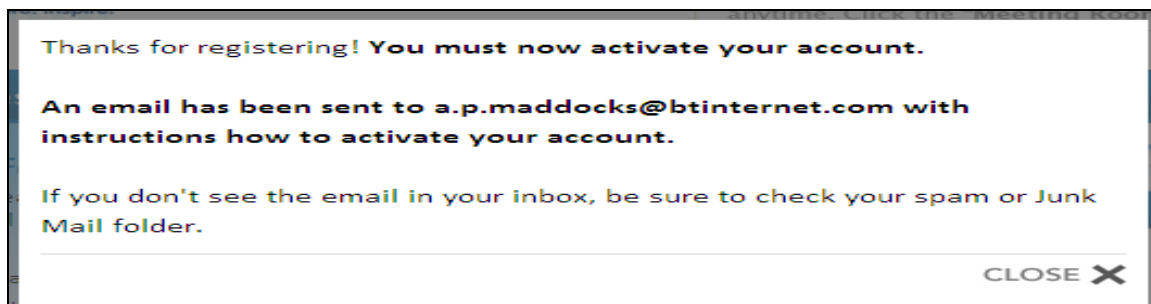


The screenshot shows the VRoom registration page. At the top, there is a header with the 'learncentral' logo (tagline: connect, share, inspire) and 'sponsored by Illuminate'. To the right, a purple box says 'Elluminati: elite group for Elluminate customers' and encourages sharing content and attending free webinars. Below the header is a blue navigation bar with links: Home, Resources, Network, Forums, Groups, Events, Login, Join, and a search bar. The main content area features a banner with three people and the text 'Three for FREE Web Conferencing' and the 'VRoom Powered by Elluminate' logo. Below the banner, on the left, is a 'Welcome!' message stating that users can meet online for free with up to two others. On the right, there is a registration form with fields for 'First Name', 'Last Name', and 'Username', each marked with an asterisk to indicate they are mandatory. A note above the form states 'Fields marked with \* are mandatory.' At the bottom of the form area, there are two tabs: 'What You Get...' and 'What You Can Do...'.

### Step 2

Fill in the fields on the right of the screen to register for V-Room

The following instructions will then appear on screen:

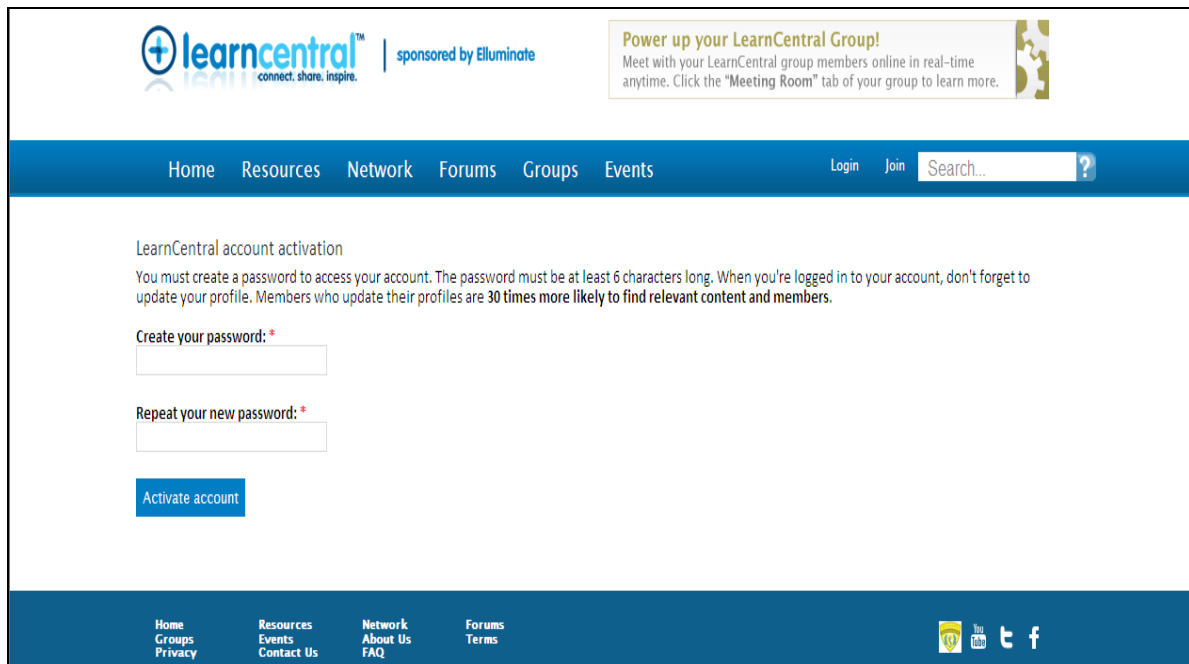


The screenshot shows a confirmation message box with a white background and a grey border. The text inside reads: 'Thanks for registering! You must now activate your account.' followed by 'An email has been sent to a.p.maddocks@btinternet.com with instructions how to activate your account.' and 'If you don't see the email in your inbox, be sure to check your spam or Junk Mail folder.' At the bottom right of the box is a 'CLOSE X' button.

An e-mail will be sent to your e-mail account. This will include a URL to access.

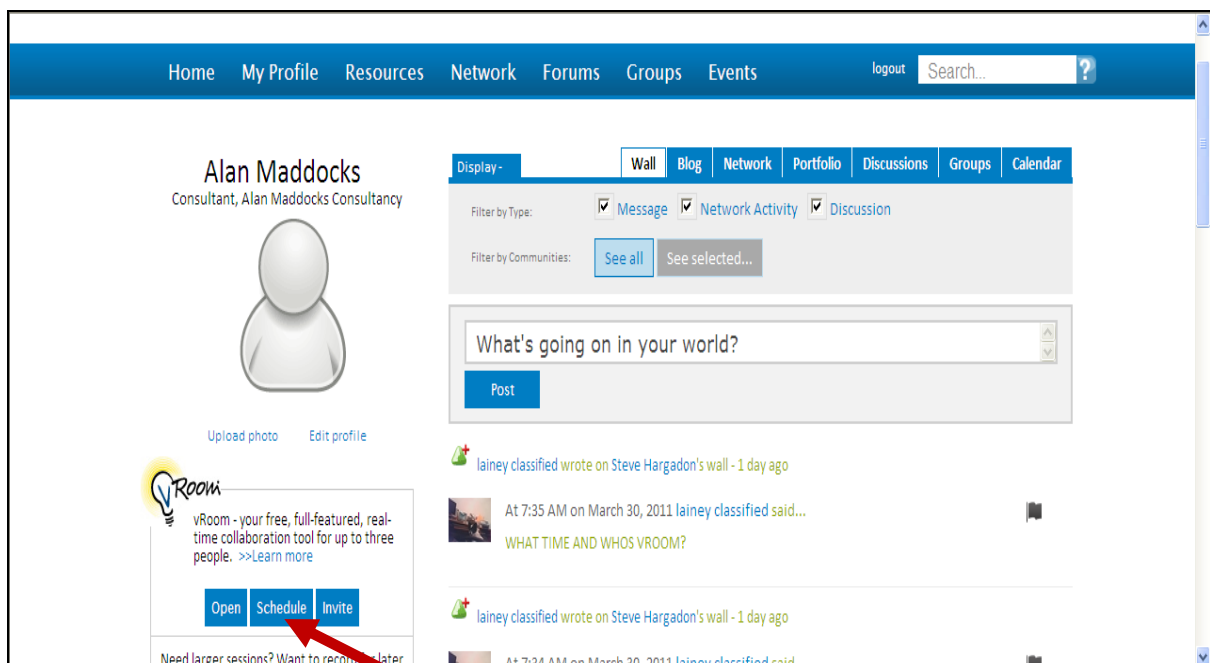
### Step 3

On clicking on - or copying and pasting this URL into your web browser - you will be taken to the following page that will enable you to activate your account.



The screenshot shows the LearnCentral account activation page. At the top, there is a header with the LearnCentral logo (a blue circle with a white plus sign) and the tagline "connect. share. inspire." followed by "sponsored by Elluminate". To the right, a yellow box contains the text "Power up your LearnCentral Group!" and "Meet with your LearnCentral group members online in real-time anytime. Click the 'Meeting Room' tab of your group to learn more." Below the header is a blue navigation bar with links: Home, Resources, Network, Forums, Groups, Events, Login, Join, and a search bar. The main content area has the heading "LearnCentral account activation" and a paragraph: "You must create a password to access your account. The password must be at least 6 characters long. When you're logged in to your account, don't forget to update your profile. Members who update their profiles are 30 times more likely to find relevant content and members." Below this are two password fields: "Create your password: \*" and "Repeat your new password: \*". At the bottom of the form is a blue button labeled "Activate account". The footer contains links for Home, Groups, Privacy, Resources, Events, Contact Us, Network, About Us, FAQ, and Forums, along with social media icons for YouTube, Twitter, and Facebook.

Once you have done this you will be taken into a personalised area where you can set up online meetings using V-Room.



The screenshot shows the LearnCentral user profile page for Alan Maddocks, a Consultant at Alan Maddocks Consultancy. The page has a blue navigation bar with links: Home, My Profile, Resources, Network, Forums, Groups, Events, and a search bar. Below the navigation bar, the user's name and title are displayed, along with a placeholder for a profile picture. To the right of the profile picture are links for "Upload photo" and "Edit profile". Below the profile picture is a section for "vRoom" with the text "vRoom - your free, full-featured, real-time collaboration tool for up to three people. >>Learn more" and three buttons: "Open", "Schedule", and "Invite". A red arrow points to the "Schedule" button. To the right of the profile section is a "Display" tab with sub-tabs: Wall, Blog, Network, Portfolio, Discussions, Groups, and Calendar. Below these are filters for "Filter by Type:" (Message, Network Activity, Discussion) and "Filter by Communities:" (See all, See selected...). Below the filters is a text input field with the placeholder "What's going on in your world?" and a "Post" button. Below the post field are several activity items, including "lainey classified wrote on Steve Hargadon's wall - 1 day ago" and "At 7:35 AM on March 30, 2011 lainey classified said... WHAT TIME AND WHOS VROOM?".

### Step 4

To set up a meeting click on the "Schedule" button (see above).

You will then be offered the opportunity (see the next image/screenshot) of setting a date and time for your meeting.

**Note:** the software will automatically recognise the international time-zone relevant to yourself (as defined by the profile you created when registering). Do not alter this unless you wish to set the time of your meeting in a different time-zone.

Once you have filled in the relevant fields (see the next image/screenshot) click on the “Submit” button at the bottom of the page to confirm the meeting.

**learncentral™** | sponsored by Elluminate  
connect. share. inspire.

Home My Profile Resources Network Forums Groups Events logout Search...

Event Details

Event Type: **Web Event** ☒ Requires registration

Name: **Another AW test**

When: **04/05/2011 17:00** to **18:00 04/05/2011** ☐ All day

Calendar: **Personal Calendar**

Participant URL: **http://www.learncentral.org/vroom/enter/55121**  
(vRoom/vOffice Participant URL pre-populated)

Phone: Pin:

Moderator URL: **https://sas.illuminate.com/m.jnlp?sid=&miuid=208C9D9A2F5**  
(vRoom/vOffice Participant URL pre-populated)

Phone: Pin:

Short Description:

Appear in search result and Event Widget.  
120/120 Characters left.

Detail Description:

Tags: Add tag+

Auto Tags: x

Presenter(s)

Name: Expand

Invites

Username or Email address: Collapse

Show my network

Add a message:

Event Reminder: ☐ Send reminder to those who RSVP'd **15 minutes** before the event.

Other

Privacy: ☐ Public ☒ Private (only invitees can see and attend) Expand

**Submit** **Cancel**

Create Event Widget: ?

☒ Yes ☐ No

Register Now »  
LearnCentral Event

Jan 01:00am

LearnCentral Widget

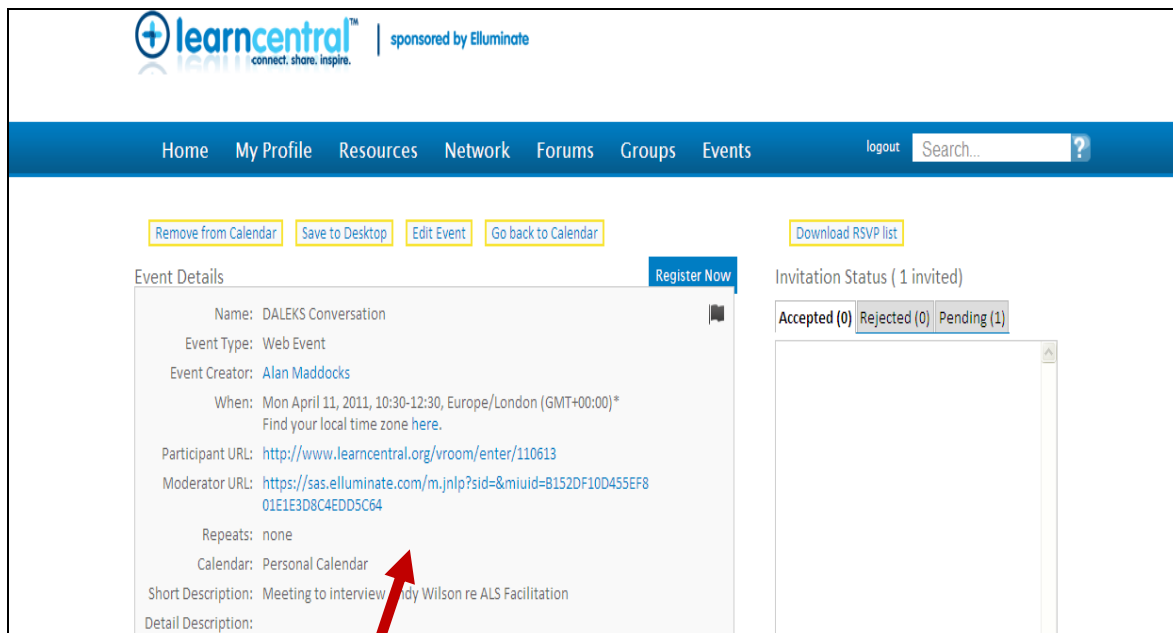
Embed code:

```
<iframe  
src="http://www.learncentral.org  
/alterevent/widget/e49cb3e7a9848  
76e9e638d0ce8e9b65f/portrait"  
style="border:
```

Select Embed code

Click on the “Submit” button to confirm meeting details.

A summary of the meeting is then created (see next page).



### Step 5:

The Elluminate software will generate:

- A moderator URL
- A participant URL

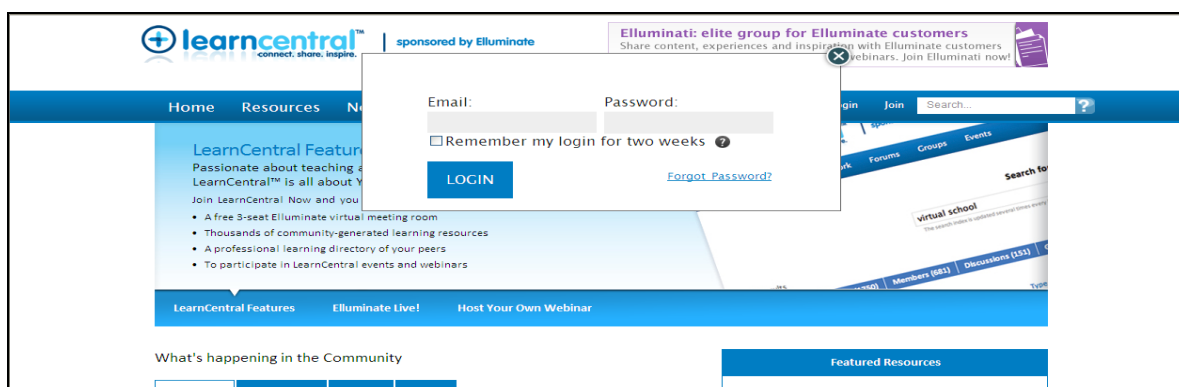
These appear in the “summary” (as above).

The moderator URL will provide you with access to the meeting that you have set up at the designated date & time. As a “moderator” you will have control over certain functionalities within the “V-Room”. You can, for instance, switch off people’s audio or video. Should you wish, you can transfer the moderator status to another of the meeting’s participants during the course of the meeting.

The participant URL - in full or shortened version (see “Shortened URLs” below) -can be forwarded to those you intend to invite to the meeting (Note: you are limited to three people per meeting including yourself).

### Step 6

Once you have set up your meeting you can then log out. When returning to the Elluminate Website you can access your account using the password that you created earlier (see below).



Here, you can:

- review the meetings that you have set up
- revise/edit details of existing meetings
- set up new meetings.

## Shortened URLs

Eliminate URLs are very long.

Should you wish to create a more manageable URL there are a number of sites that allow you to do this. One of these is: <http://www.miniurl.org> (see below)

The screenshot shows the MiniUrl.org homepage. At the top, there's a navigation bar with tabs for 'create:' (fast url, custom url, safe url, subdomain) and 'view:' (stats, terms of use). The 'fast url' tab is selected. Below the navigation bar, there's a section titled 'Get a short URL here!' with a sub-header 'Fast Url'. It says 'No signup required, no ads, instant redirection, custom URL (miniurl.org/mysite), logging, and more!'. There's a text input field containing 'http://www.learncentral.org/vroom/enter/110613' and a 'Shrink It!' button. To the right, there's an 'Ads by Google' section with a link to 'Nottingham Coupons' and a 'Tell A Friend' section with input fields for 'Your Name', 'Your E-mail', and 'Friend's E-mail'. At the bottom, there's a 'Bookmarklet' section with instructions on how to use the service.

Here by copying & pasting in your URL and clicking on the “shrink it” button the website will automatically create a “Short URL” of the longer version.

The screenshot shows the MiniUrl.org homepage with the 'custom url' tab selected. A red arrow points to the 'custom url' tab. The 'Success' section displays 'Your New Mini URL: http://miniurl.org/18x' and 'Old URL: http://www.learncentral.org/vroom/enter/110613'. It also includes instructions: 'If you are using IE4+, your ShrinkURL has been copied to your clipboard. Otherwise, highlight your ShrinkURL and press CTRL-C to copy it.' There's a text input field for 'Enter your long URL...' and a 'Shrink It!' button. The 'Tell A Friend' section is also visible at the bottom.

Alternatively, you can use the “custom url” button (see above). This enables you to create your own shortened URL. You cannot use the same personal URL twice.

## Section 4 – How to work in an online action learning set (Guidance for set members)

Some people will be new to action learning; some to web conferencing methods; and some to both. So the next sections are aimed at:

- Those new to action learning
- Those who have been members of sets before
- All set members

### ***For those new to action learning***

We always recommend that before joining an action learning set you should have a conversation with an experienced facilitator (who doesn't necessarily have to be the person who will be facilitating your particular set) about how sets operate and what you can expect.

This is as true for online action learning (OAL) sets as it is for face-to-face (F2F) sets. So expect to have such a conversation and use it to explore your hopes and expectations of the set.

Here's some guidance that we use to introduce people to action learning...

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### ***Action Learning – An Overview***

**"Action learning is a continuous process of learning and reflection, supported by colleagues, with an intention of getting things done."**

*Beaty & McGill, 2001, p11.*

Action Learning is an approach to the enhancement of understanding and skills that enables a group of peers to support an individual's development. It is about helping and being helped.

Approaches vary, but in our model Action Learning Sets meet every four or five weeks – for four or five times – to discuss real issues that members of the set are facing in their working lives. Within each set meeting all members will have a slot, lasting about 45 minutes, during which their issue is considered. A member will present his or her issue and its context; the other members of the set then help the presenter to clarify the issue and to develop ways of addressing it. This one-at-a-time focus on the presenter's issue helps them to identify actions; these will be implemented, and the process and its consequences are then discussed at the next meeting.

The issue or problem must be one of substance so that it can be addressed over a period of time. It should not be a "puzzle", i.e. something where there is a correct answer that just needs to be discovered.

The emphasis is on learning about action in real – and often powerful – situations. The discussions within the set must therefore be completely confidential to the set.

In addition to helping the issue-holder to address their issue, the process also gives the other set members valuable insights into other people's situations, and the opportunity to develop their own skills in clarifying, reflecting and questioning.

Set members are not uncritical supporters of the presenter; their role is to challenge assumptions, to help the presenter check out reality, etc. It is not to provide counselling, though the skills of being an effective set member do overlap with those of the counsellor, ...and those of the manager, and the colleague, and the coach, and the mentor, and the critical friend...

The role of the set facilitator is:

- to make sure that the set agrees limits – and sticks to them
- to ensure that time is fairly distributed across the set members
- to help make the whole process a productive one

Anyone considering joining an Action Learning Set should:

- be willing to accept the confidentiality conditions
- be able to commit the time to attend all the meetings of the set
- have a significant professional issue that they would like to address

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You may or may not have a F2F meeting before an online set; our experience is that F2F meetings are not necessary as long as the set members are given time before the set starts work to find out something about each other.

This can also be a time when you can play with the features of Elluminate.

### ***For those who have been members of sets before***

OAL is different from F2F, but it is definitely action learning.

Using something like Elluminate provides access to equivalents to F2F tools, such as the shared whiteboard, and to things that would not be available in F2F sets, such as online chat. It may seem surprising that set members might chat while others are talking – our own initial reaction was that this was really rude! – but, as long as certain protocols are agreed within the set, we have found such approaches to be genuinely helpful.

People who have experienced both types of set made the following observations about OAL sets:

- They noted that whilst it was more difficult to pick up on subtle physical cues than in a F2F meeting that they as a result concentrated more on paying attention to what was said
- They noted that periods of silence during meetings appeared to be more natural and that they were less inclined to jump in or interrupt during natural pauses in conversation



- Whilst some found the presence of additional stimuli (such as the chat function) a little distracting at first, others noted that it just changed the dynamics of the interaction, helping to shape the conversations taking place
- Some set members found the experience of OAL provided a greater opportunity to think and reflect. Many commented that the online environment was “engaging” and provided a rich learning environment
- Some felt that it was easier to summarise the main points arising from conversations and that as a result it was easier for them to be more definite about their future actions based on the experience

Most people who had had previous action learning experience commented favourably upon their experience of OAL. They noted the huge potential for enriching the learning experience and noted that any initial difficulties in adjusting to the OAL mode could easily be overcome with more experience.

### ***All set members***

The technology is the most obvious feature of OAL sets and it is really important that you are set up properly, that you have a chance to play with the technology, and that you test your setup – especially the audio – before each set.

Potentially, the greatest risk offered by working online is a loss of connectivity during set meetings. This risk can be minimized by using a full network connection rather than relying on wi-fi. Having an alternative means of contacting set members (e.g. by mobile phone) should contact be lost as a result of Network/Broadband issues is a sensible insurance policy to have. If it makes you feel more comfortable, arrange the back-up (on demand) of assistance from a learning technologist (or similar) familiar with Elluminate within your own Institution.

The features of OAL using Elluminate offers set members some means of communicating and sharing knowledge that mirror F2F processes. These include: audio; video; shared whiteboard, & Notes. The mirroring is not, however, precise. Be aware that: there can be lags in the audio; that the video image is less complete and less detailed; and that sharing the whiteboard is less intuitive. Notes can be taken within Elluminate or in a Word document and because people are at their own computers these can be more complete than in F2F sets. Our experience is that in practice these differences do not seem to cause difficulties.

Elluminate also offers the following additional functionalities that would not be available to you if meeting F2F: parallel chat (both public and private); and the sharing of applications. These additional features can change the process/processes engaged in. One notable difference arising from these additional layers of communication is the degree of parallel processing that can take place (e.g. you have the ability to comment via the “chat” facility while conversations are taking place). These additional inputs/features help shape the conversations and interactions taking place.

You should expect your set facilitator to help lead set members towards agreeing upon a set of protocols as to how the features of the online environment should be used and meetings conducted. Moreover, try to avoid external distractions such as incoming e-mails or telephone calls.

In addition, be aware that the dynamic of the way in which people interact with each other in an OAL set will be different. You may very well find that the experience is more business-like and less emotionally charged. As a result you may find yourself focusing more clearly on the issues rather than the personalities involved.

You may notice that - possibly promoted by the physical remove of one member from another - set members are more willing to challenge other set members. There may be an added intensity to conversations and a greater sense of group attention. You may find that there is more (and deeper) reflection than you would get in a F2F environment. This can be very challenging upon levels of concentration.

Elluminate offers a number of tools that aid social interaction. These include: switching the microphone on and off; indicating a raised hand (if one wishes to contribute or signal agreement for a specific proposal); using the “Emoticons”; and using the voting function. Again, expect your set facilitator to help establish protocols on the use of these features.

## **Section 5 – How to facilitate an online action learning set (Guidance for facilitators)**

### ***Introduction***

Online Action Learning (OAL) is where Action Learning Sets “meet” online as opposed to face to face (F2F), using a medium such as Elluminate.

This creates an environment that is somewhat different. It presents challenges and opportunities that would not occur if set members were meeting together in a physical setting. In many ways the experience of OAL is very similar to F2F. However, there are differences (some very subtle) that can change the dynamics of the interaction between set members.

This Guide/Section is aimed at raising awareness of these differences/similarities so that Facilitators can be better prepared to address potential issues and can help establish the conditions for an effective learning experience.

A more extensive Evaluation Report (Section 6) provides further useful insights.

### ***General Principles of Action Learning Facilitation***

Action Learning involves set members with common or similar responsibilities and experiences meeting in small groups to discuss issues of professional practice that are of concern to individual set members. Collectively, action learning sets, through a process of questioning, debate and discussion, would seek to explore and deepen understanding of these issues. The differing experiences/ perspectives of set members help to enrich discussion and promote understanding and learning. Ways of addressing issues of concern would be debated leading to specific actions being agreed.

Good facilitation would promote and enable the above process to take place with the intention of leading towards effective solutions sought and actions agreed.

In our experience, effective action learning facilitation involves the Facilitator taking a lead role in:

- Helping to establish agreed protocols amongst set members
- Establishing a purposeful but not rushed agenda
- Setting the tone/mood of the conversation
- Creating a calm and reflective environment
- Encouraging in-depth conversation and deep reflection
- Moderating the discussion between set members
- Encouraging the identification of, and commitment to, actions

In short, facilitation is about both providing guidance to the set as a collective, and modelling the processes leading to effective practice.

## ***Online Action Learning***

The evaluation conducted to gather and analyse the experiences of those involved in the DALEKS Project (see Section 6) reveals that OAL can be as effective a learning environment as F2F Action Learning. Indeed, some of those engaged - who had had extensive prior experience of F2F Action Learning - commented on the “richness” of the learning experience using the online approach.

Many of the interactions amongst set members with OAL were very similar to those experienced in a F2F environment. However, significant differences exist. OAL Facilitators need to be aware of these differences so that they can continue to be effective in moderating discussion and steering activity towards desired outcomes.

These differences can be classified as:

- Technical (relating to the online technology employed)
- Process (relating to the additional interactive opportunities offered by the functionality of the online medium)
- Social interaction (relating to how set members may interact and respond differently in an online environment)

### ***Differences (Technical)***

OAL (using Elluminate) involves each set member being logged into the Elluminate system on their computers at an agreed date/time. The technical requirements include an audio headset and a webcam for each set member to enable set members to hear and see each other.

The Set Facilitator working in an online environment would be expected to:

- Familiarise themselves fully with the technology involved
- Raise awareness of potential technical issues
- Arrange ways of addressing technical issues should they arise
- Support set members in familiarising themselves with the technical environment and the added communication options available

The Set Facilitator does not need to be hugely technically competent as long as he/she can provide set members with access to such expertise.

One option open to the Facilitator is to have a “Technical Moderator” present at the initial meetings of the set. (The initial DALEKS experience involved the use of such an individual.) The role of the Technical Moderator would be to oversee the technical set-up and familiarise set members with the technical environment (e.g. by taking set members through the system on a step-by-step basis). Such a person would be able to deal with any issues that might arise (e.g. regarding audio/video or network issues). However, the presence of a Technical Moderator may also potentially have a negative effect in taking the locus of control away from the designated Set Facilitator.

Probably a more effective approach is for the Set Facilitator to undergo training in using the system beforehand and then acquiring confidence and expertise through experiential practice.

Actions that the Set Facilitator may well find useful to do include:

- Alerting set members to the most common technical issues that might arise
- Providing “troubleshooting tips” on how to address/overcome these most common technical issues
- Conducting an initial (technical) session with set members to familiarise themselves to the online environment
- Conducting a collective audio check prior to commencing discussions at the start of each set “meeting”
- Having alternative means of contact (mobile phone for instance) should contact with set members be lost as a result of Network/Broadband issues
- Having the back-up (on demand) of assistance from a learning technologist (or similar) familiar with Elluminate within his/her own Institution

### ***Differences (Process)***

OAL using Elluminate offers set members some means of communicating and sharing knowledge that mirror F2F processes. These include:

- Audio
- Video
- Shared whiteboard
- Notes

The mirroring is not, however, precise. There can be lags in the audio, the video image is less complete and less detailed, and sharing the whiteboard is less intuitive. Notes can be taken within Elluminate or in a Word document and because people are at their own computers these can be more complete than in F2F sets.

In practice these differences do not seem to cause difficulties.

Elluminate also offers the following additional functionalities that would not be available to set members meeting F2F:

- Parallel chat (both public and private)
- Sharing applications

These additional features and their potential use within the Action Learning Set environment changes (or adds to) the process/processes engaged in. One notable difference arising from these additional layers of communication is the degree of parallel processing that can take place (e.g. set members have the ability to comment via the “chat” facility while conversations are taking place). There are more stimuli available: audio and visual, with “chat” providing a parallel commentary. The additional inputs/features help shape the conversations and interactions taking place.

With OAL the added functionality (especially “chat”) can be a distraction. A limited degree of synchronous chat may be very positive in helping to shape the agenda and store questions for future use, but it must not become overwhelming. Moreover, there is an increased density of information for set members to assimilate prompted by the various visual stimuli offered within the online medium.

It is recommended that the Facilitator sets up the system so that they see all chat that is going on, and that the set discusses the use of chat. Our view is that a limited amount of public chat can be helpful, but that excessive or private chat is not.

Application sharing allows a set member to share what is on their computer screen in another application. So it could be used to show an organisation chart or some key points. This requires a fair amount of technical competence and runs the risk of turning the discussion into a presentation.

As a result the facilitator's task is more complex. He/she needs to be aware of all the potential interactions taking place. This calls for clearly defined ground rules, especially on the appropriate use of the "chat" facility.

Thus, the facilitator should:

- Discuss with set members how they wish to use the additional features/functions available to them
- Agree protocols as to how and when these features can/should be employed
- Review the set members' experiences of the online environment at the end of meetings to refine protocols and practices
- Agree how best to use the "Notes" function to keep a log/record of discussions and/or key points emerging. (This could help provide a 'commentary' for set members.)

Facilitators may well find that different sets respond differently to the added layers within the OAL environment. Our experience indicates that whilst some sets may well embrace the added opportunities available others may just wish to replicate the F2F experience.

It is our view that a failure to make use of the added functionality on offer diminishes the experience. Facilitators need to think about how the learning experience can be enhanced through the added functionality, and should encourage set members to take advantage of the opportunity to enrich this experience.

One additional consideration that Facilitators ought to be aware of is that as each set member is "logged in" via their own personal computer, they may well get distracted by incoming e-mails or telephone calls. An agreement with set members beforehand to ignore such distractions would prevent meetings being interrupted in this way.

### ***Differences (Social Interaction)***

In F2F meetings individuals can readily gauge the reactions and responses of others by picking up on certain visual cues (e.g. a frown, smile etc.). Those wishing to ask a question or offer a comment can indicate by means of a physical sign (e.g. raised finger or hand) that they wish to speak.

With OAL this is not possible. The physical separation of one individual from another alters the dynamic of the way in which people interact with each other. With OAL social interaction is different. People are more "detached" and the environment is more business-like and less emotionally charged. As a result there is a tendency to focus more clearly on the issues rather than the personalities involved.

One notable difference (within the online mode) - possibly promoted by the physical remove of one member from another - appears to be the willingness of set members to more readily challenge other set members. This may indeed promote positive and rewarding discussion but needs to be carefully managed in an environment where rapport between set members may yet to have been fully established.

Those who have experienced OAL comment that it can be more challenging and focused. There is an added intensity to conversations and a greater sense of group attention. There appears to be more (and deeper) reflection going on, possibly encouraged by the reflective nature of the 'chat' function.

One consequence of this is that the experience can be very challenging upon the participants' levels of concentration. There is a need to ensure that "meetings" are not overly long and that breaks are planned at regular intervals to allow individuals to refresh their thoughts.

The Facilitator will need to recognise that the social interaction amongst set members will be different to F2F interaction. There is less reliance on communication through subtle physical cues and as a result a more direct and challenging interaction takes place. The danger lies in whether there is sufficient rapport between set members for this to be deemed a positive rather than a negative factor.

Elluminate offers a number of tools that aid social interaction. These include:

- Switching the microphone on and off
- Indicating a raised hand (if one wishes to contribute or signal agreement for a specific proposal)
- Using the "Emoticons"
- Voting

The first two can be used to aid turn-taking. Switching your microphone off when you are not talking helps improve sound quality. (When switched on a yellow background to your microphone icon appears in the Participants window). This can be used to indicate that you want to speak. Raising your hand is perhaps a clearer means of indicating a wish to speak, and it has the advantage of indicating the order in which hands are raised. Emoticons can indicate applause, puzzlement, etc and so can provide useful feedback to the speaker. As can the use of chat.

Thus, the Facilitator may wish to:

- Make set members aware that the OAL experience may be more "challenging" and intense than F2F interaction
- Explain carefully the use of the interactive tools and model their use during the session
- Carefully monitor the reactions of set members
- Moderate the social interaction should individuals become uncomfortable
- Set regular breaks to enable participants to unwind and refresh their thoughts

Should the facilitator have concerns that difficulties might arise (with respect to social interaction), one option available to him/her would be to arrange a prior F2F meeting with set members to help establish rapport before embarking on the online approach.

Whilst not a pre-requisite, this may be something to consider in individual discussion with each set members before embarking on an initial meeting.

## **Summary**

For many, OAL offers a more intense and challenging experience than F2F Action Learning. To experience the full benefits however requires a slightly different approach from the Set Facilitator.

He/she needs to support the engagement of all set members, instilling confidence in working within an online environment.

He/she should:

- Recognise that the experience of OAL is different from F2F Action Learning
- Make set members aware of these differences
- Consider fully the options available to him/her (e.g. whether to engage a Technical Moderator, whether to conduct an initial F2F meeting etc)
- Instil confidence in the online experience by ensuring that steps are taken to ensure that everyone is comfortable with the technology used (including audio and video) and fully briefed in the use of the Elluminate system (see Differences: Technical)
- Gain agreement from set members on the protocols and conduct of set meetings (see Differences: Process)
- Monitor and guide interaction between set members (see Differences: Social Interaction)

*Claire Bradshaw, Alan Maddocks and Andy Wilson  
Loughborough University, 2011*

*Supported by a Small Development Grant from  
the Leadership Foundation for Higher Education*



## **Section 6 – DALEKS: Evaluation Report (September 2010)**

(The following Evaluation Report makes reference to “Desktop Action Learning”. This is the same as “Online Action Learning (OAL)” as referred to in earlier Sections.)

This Report details the main findings of an interim evaluation - conducted in late August and early September 2010 - of the DALEKS (Desktop Action Learning: Experience, Knowledge & Skills) Project.

### **Background**

The DALEKS Project was funded to investigate the use of web-based technologies to allow people to participate in Action Learning Sets from their own desktops.

The primary aim of the project was to see if the difficulties inherent in organising regular face to face action learning meetings between senior leaders within higher education institutions could be overcome by deploying online technologies.

Following an initial pilot three Action Learning Sets were set up with ‘meetings’ arranged on an online basis during January to July 2010. Each set included a set facilitator and three set members. A technical moderator was present (in an online capacity) at each set meeting.

### **The Technology**

For participants to engage in Desktop Action Learning is straightforward, requiring little in the way of additional technology over and above that to which they will already have ready access. In short, participants require the use of a PC or Laptop with a webcam and headset. In addition, to experience full functionality the PC or laptop used needs to have an up to date version of JAVA installed.

For the duration of the period under evaluation the software to support this process resided at the University of East Anglia (UEA) and is accessible via the web.

UEA staff have a strong reputation for supporting innovative practice with e-learning. Over the past 4-5 years they have evaluated a range of online communication software such as that offered through the Blackboard VLE Suite and Wimba’s Live Classroom. They have found the specific software (Elluminate) used for the DALEKS Project to be the most effective.

At UEA Elluminate has been piloted over the past 2 years. This has involved using Elluminate to run Staff Development sessions and in supporting academic staff in using Elluminate in their learning and teaching. In the opinion of the Technical Moderator (based at UEA) Elluminate currently offers the best package in comparison to similar software options in terms of both functionality and costs.

The Elluminate software offers a range of options. These include both audio and visual communication. (Note: each participant can select different visual modes e.g. full screen, multi-screen etc.) In addition to Desktop Action Learning set participants being able to see and hear other members they can also use the complementary ‘chat’, ‘whiteboard’, and ‘Notes’ functions offered by the software to enhance interaction between set members.

## **Evaluation**

Independent evaluation was conducted (in late August / early September) in order to capture the experiences of those involved in the initial Desktop Action Learning Sets held in early 2010 and to draw out key findings based on these experiences.

The evaluation was conducted by means of telephone interviews with: both the set facilitators involved; one member of the technical moderation team; and seven of the nine set members. Each interview was based on a set of questions designed to capture the experiences, views, and reflections of those involved in the DALEKS Project. Each participant in the evaluation process was asked the same set of questions though each participant had the opportunity to provide additional comments and observations over and above the questions that they were asked.

Each interview took in the region of 30 minutes to complete. Notes based on each interview were subsequently e-mailed to the relevant interviewee to enable them to correct any errors or omissions, revise any observations offered, and to provide any further information that on reflection they wished to add.

For the purposes of this report each participant will be anonymised. Participants will be individually referred to as Interviewee 1, Interviewee 2 etc. though their roles (set facilitator, technical moderator, or set member) may be disclosed if this is relevant to the point being made.

## **Results**

The following sections details the results arising from the evaluation conducted.

### **Prior Experience:**

Interviewees were asked to specify their previous experience of Action Learning Sets (prior to the DALEKS Project) and for their experience in the use of the technology used.

As might be expected both set facilitators had considerable experience of Action Learning Sets. Indeed one of the facilitators had experience of having run training sessions on facilitating Action Learning Sets for both Staff Developers and the higher education research community. Set members had varying degrees of prior experience. Two set members had had no previous experience whilst another two set members had run and facilitated Action Learning Sets of their own.

Most interviewees had used basic Skype technology, mainly in a social networking capacity. Very few of the interviewees however had used the Elluminate communications software though some were aware of it through having viewed presentations at academic conferences. One interviewee (Interviewee 9) had used a less sophisticated package (Dim Dim) whilst another (Interviewee 5) had used Elluminate twice previously but stated that neither experience had been “particularly successful”. One interviewee (Interviewee 6) stated that his general lack of familiarity with the technology had been “one of the motivations for taking part in the project”.

## General Experience of Desktop Action Learning:

Those interviewees whom had previous experience of Action Learning Sets were asked to state to what extent Desktop Action Learning replicated face to face action learning. Interviewees were also asked to note any significant differences in how they interacted with other set members.

All participants who had had previous experience of Action Learning Sets in a face to face environment agreed that there were differences arising from the use of the technology.

The main differences noted were as follows:

- Most interviewees commented that it was more difficult to pick up the subtle physical cues one would notice in a face to face environment. One interviewee (Interviewee 6) noted that at first inter-personal relationships were slow to become established. Another (Interviewee 10) stated that the lack of physical cues made it “more difficult” in knowing when to pitch into a conversation. Another (Interviewee 4), whilst recognising these difficulties, felt that these might have arisen as a result of unfamiliarity with the technology and that over time people would become more comfortable with it.
- Conversely, it was noted that periods of silence appeared to be more natural and less strained within the online environment. One interviewee (Interviewee 8) noted that the extra layer provided by the technology made people “less inclined to jump in or interrupt”. As a result, he found that “people were more considerate when using the Desktop approach”. Another interviewee (Interviewee 9) felt that these natural pauses made the whole experience with the Desktop approach “easier”.
- Another significant difference noted was the challenge and opportunity posed by the extra features offered by the technology. Specifically, the ‘chat’ facility made it possible for set members to comment whilst conversations were taking part. Some found the presence of different stimuli to be “distracting” but others noted that it just changed the dynamics of the interaction, helping to shape the conversations taking place.

Interviewees were also asked to comment as to whether the way they learnt or reflected was different with the Desktop approach.

Some interviewees felt that there was little difference. Others however felt that the learning experience was different. One interviewee (Interviewee 4) described it as “challenging”. Another (Interviewee 8) stated that he found himself “paying more attention” as a result of the online environment. Another (Interviewee 9) declared that it gave her more time to think and reflect, whilst another (Interviewee 1) felt that the learning was more “chunked” with people being more able to summarise and be definite about their future actions. This same interviewee concluded that the online environment was “engaging” and provided a “rich learning environment”.

In short, on the whole, interviewees commented favourably upon the Desktop approach. Whilst recognising that the interaction was different they did not feel that this compromised their experience. Most felt that there were distinct advantages arising from interacting through the online medium. As the most experienced interviewee (Interviewee 2) commented: “the process is different ... (but) ... the core elements of Action Learning Sets are still present”

## **Benefits Recognised:**

All interviewees noted certain benefits arising from Desktop Action Learning.

The most commonly identified benefits centred upon the time saved in holding Action Learning Sets online. 'Meetings' could be held in the allotted 2-3 hours whereas face to face meetings would involve the extra travel time in most cases meaning set members would need to set aside a whole day for the activity. In addition, it was noted that associated travel costs would also be saved.

One interviewee (Interviewee 8) noted that there was also a saving associated with the time taken to organise and make arrangements to hold face to face set meetings. He described the experience of switching on to an online meeting as "instant". He noted that for him this added efficiency was "completely unexpected".

Many interviewees also remarked upon the added flexibility arising from Desktop Action Learning. One such interviewee (Interviewee 2) noted that sets need no longer be confined to a set time period. He noted that in a given week a set meeting might be spread across two one and a half hour sessions as opposed to a single, standard three hour session.

Some interviewees noted that Desktop Action Learning enabled sets involving more geographically dispersed individuals to come together. Indeed, one interviewee (Interviewee 8) noted that - based on his experience with the DALEKS Project - he was now using the technology to enable him to form an Action Learning Set with international colleagues with whom he had wanted to collaborate with for some time.

Some interviewees commented further on the benefits in terms of the learning and reflection opportunities provided. One interviewee (Interviewee 9) described having more time to reflect. Another (Interviewee 5) stated that he found that the de-personalised interface allowed him to be "more honest and revealing". Interviewee 1 commented that she found that there is something different about the process that offers benefits in terms of the learning experience but that she was unclear as yet as to what these benefits were.

A couple of interviewees also noted that the added functionality offered by the online environment enabled a richer sharing of ideas and resources to take place.

For these benefits to be realised, interviewees noted that certain factors or conditions needed to apply. These basically fell in to one of two categories: technical and operating process.

On the technical level it was noted by one interviewee (Interviewee 4) that "the technology can make or break the experience". Issues that arose during the project included some people's PCs not having the up to date JAVA capability to fully support the Elluminate software and a loss of internet connection due to institutional network problems.

The Technical Moderator interviewed (Interviewee 3) noted that technical issues or problems are unavoidable but that prior checking of equipment, a familiarisation session for all participants, and the online presence of a technical moderator would help to mitigate the risks. (Note: the same interviewee highlighted the fact that face to face meetings also had associated risks such as travel delays, bad weather, illness etc.)

Interviewees noted that as they became more familiar with the technology their competence and confidence grew. It was noted that set members would need to realise that this would take a little time to develop.

In terms of the operating process it was noted that set participants would need to establish conventions or ground rules in terms of how interaction between set members would take place and how the group would function. Issues to be addressed included deciding on who would speak when, how interjections should take place, and whether the 'chat' facility should be used. Again, there needs to be a realisation that it will take a little time for these conventions to become established within a group or set.

A number of interviewees also stressed that participants must be prepared to "give it a go" and to try and resolve any issues or problems that might arise.

### **Drawbacks Identified:**

There was a considerable degree of unanimity as to the drawbacks with Desktop Action Learning. These fell into two main categories: the technical and the user experience (compared to face to face meetings)

As mentioned previously, the technical drawbacks tended to centre upon the readiness of PCs to accommodate the software and the potential for loss of internet connection.

To overcome such difficulties, the following suggestions were made by those interviewed:

- Test the technology (particularly internet connection) thoroughly before each meeting
- Hold an initial "familiarisation" meeting where individuals would specifically just test out the software and its various functionalities
- Ensure that initially meetings are held with a technical moderator present or on call
- Issue a set of technical instructions to set members on the use of Elluminate
- Encourage people to become familiar/competent with the technology

One interviewee (Interviewee 8) commented that there "needs to be a willingness to accept that the technology could potentially cause issues". Another (Interviewee 3) noted that the benefits offered by the Desktop approach clearly outweigh any problems caused by the technology or connectivity issues. In addition, she noted that as the internet develops over time issues with loss of connectivity for instance should become less frequent.

The other main drawback noted was that people felt less socially connected. One interviewee (Interviewee 2) noted the lack of physical intimacy (compared to face to face). Another (Interviewee 8) commented that the experience can be "a little bit stilted", whilst another (Interviewee 4) remarked that it was "difficult to build a personal rapport" with the Desktop approach.

A number of interviewees suggested that this lack of social connection might be readily addressed by holding an initial face to face meeting to allow people to get to know each other before embarking on the Desktop approach.

Other drawback noted included the need for privacy and the possibility of being distracted by incoming e-mails or others using the chat functionality within the technology.

It was also noted by more than one interviewee that some people might find the Desktop approach too intimidating or impersonal.

### **Role of the Facilitators:**

With Desktop Action Learning there are two modes of facilitation: technical moderation and set facilitation.

The role of the technical moderator is to demonstrate the features of the technology to newcomers and to address any technical issues that arise.

The technical moderator interviewed noted that once the set facilitator becomes technically proficient with the software and fully aware of the technical issues that might arise then the need for a technical moderator to be present online is substantially reduced. In these circumstances it should be sufficient for the technical moderator to be “on call”.

The role of a set facilitator is to: set tone; establish calm; encourage reflective thinking; manage time; and moderate process. With Desktop Action Learning the role also includes: alerting participants to potential issues arising from the technology; and establishing (in consultation with set members) the conventions that will apply.

One of the set facilitators interviewed (Interviewee 1) noted that with Desktop Action Learning it was easier to “chunk” discussions and summarise. In addition, it was felt that set members appeared to rely less on the facilitator to provide structure and process than would be the case with a face to face meeting. (Presumably with Desktop Action Learning the technology interface helps to provide an agreed structure and modus operandi).

Interviewees were asked to identify what aspects of the set facilitation helped to enhance the Desktop Action Learning process.

All set members interviewed commented favourably upon the quality of facilitation that had been provided. They noted appreciatively that the facilitators - in addition to fulfilling the role outlined above - had provided support, guidance and encouragement as required.

In terms of experience with the technology, one interviewee (Interviewee 5) noted favourably that the set facilitator (Interviewee 2) had empathy with the technology. On the other hand, another interviewee (Interviewee 4) noted that it was helpful that the facilitator (Interviewee 1) was “also learning about the technology and was not an expert in it”.

In terms of additional support that the facilitators could have provided one interviewee (Interviewee 5) remarked that there was a need for “greater pre-orientation regards the Elluminate system)

### **Future use of Desktop Communication:**

Interviewees noted a number of contexts in which they had either already begun to use the Desktop Communication approach or would consider using it in future.

A number of interviewees stated that they intended to extend their experience of Desktop Action Learning Sets by forming their own sets and taking a facilitation role. A couple of

interviewees suggested that they intended to initially meet as a set on a face to face basis but would then hold follow up meetings through the Desktop approach.

Other potential or current uses of Desktop Communication noted include:

- To support students on work placement (enabling staff to talk to students and their mentors in the placement setting)
- To support distance learners (both collectively and on a one-to-one basis)
- To hold meetings with colleagues from other institutions
- To run Workshops and Seminars
- For mentoring and coaching purposes
- For remote conferencing
- For peer support groups and manager forums

The critical factor mentioned by most interviewees when considering these options was the benefit accrued in terms of time saved and travel requirements avoided.

The full potential of Desktop Communication was best summed up by one interviewee (Interviewee 8) who related that he had recently held a quarterly meeting with each of the 35 projects that he currently manages for his organisation (a national funding body) through Desktop Communication. This had saved him considerable time, effort and cost by eliminating the need to visit each project in person.

## **Conclusions**

A number of key conclusions can be reached.

These are:

- The vast majority of those interviewed provided positive feedback on their experience of Desktop Action Learning (despite the technical issues that arose)
- Most interviewees were keen to continue to use Desktop Communications for future Action Learning Sets or for other purposes
- Most interviewees felt the quality of interaction with other set members had not been compromised through the Desktop approach. Indeed, one interviewee expressed that he felt more able to be “honest and revealing” through this medium
- Most interviewees felt that the Desktop approach offered a comparable opportunity to learn and reflect. One interviewee stated that she felt there were tangible benefits in terms of the learning experience, whilst another interviewee stated that “there appeared to be more reflection going on”.
- The benefits in terms of time saved and travelling avoided were clear to all. The costs implication of this should not be underestimated, especially in the current financial climate that Higher Education Institutions are working within
- The Desktop approach (enhanced through the various functions made available through the technology) offered a degree of flexibility that would not be found under a more traditional approach
- The drawbacks noted relating to issues with the technology and internet connectivity can be largely avoided or easily overcome
- The potential to expand the use of Desktop Communication to support and enhance other activities is enormous

## Key Advice

Interviewees were each asked to offer one or more key pieces of advice. Their responses were as follows:

- Don't be tripped up by the technology. When problems or issues arise they can be overcome.
- Test the kit thoroughly before engaging with other people
- Engage fully with the multiple tools (e.g. chat, whiteboard etc.) at your disposal
- Make sure the technology is right, and take time to get the social process right
- A familiarisation session for participants is essential. This can help participants plan sessions and decide on how to interact
- Become confident and competent through extensive practice
- Think through why you are using Desktop communication. What is the intended purpose, aim, and outcome? Decide to embed it into practice so it feels normal.
- Stick with it to develop familiarity and gain confidence. It probably takes a few meetings using the Desktop approach to become comfortable with the environment.
- Ensure that you have other people's contact details in case of technical issues
- Don't underestimate the naivety (i.e. lack of experience) of the end user
- Facilitation is key ... Inexperienced facilitators could be provided with some basic resource (detailing ground rules to apply, questions to ask, list of relevant resources etc.) to initiate Action Learning facilitation
- Make sure the technology is reliable. Use networked internet connections rather than the more unstable wireless option
- Don't be put off by the initial differences in style and process
- Learn how to use the technology. Play with it beforehand to find its limitations before using it for real
- Don't assume that set members have prior knowledge in terms of technical or software applications
- Do not be afraid of providing detailed, simple instructions on what to do
- Persevere in the first instance to overcome any "clunkiness" with the technology
- Be confident that technical support is available to address potential technical issues

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September 2010*

## Acknowledgements

We would like to thank the Leadership Foundation for its financial support for the project and Jo Bruce and Andy Mee, of the University of East Anglia for their technical help throughout the project.