Virtual Collaboration

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On the Tipping Point of Transformation

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Kate sat staring at her computer screen. She had called Charles, her technology coordinator, and was waiting for him to return from a boating adventure so he could log in and take down what had become a disastrous attempt at virtual collaboration in her district. While she waited for Charles, she read through some additional posts regarding ELs.

Tammy, one of Kate’s favorite new teachers, had gone off on a tangent in this shared learning space about her frustrations in housebreaking her two new beagles, Lucy and Charlie Brown. She had posted pictures of the dogs and found humor in their disapproving reaction to her boyfriend. Following the thread were a number of unflattering comments that made the most of the relative juxtaposition of men and barking dogs. To make matters worse, Kate noticed that one of her staff members had taken the opportunity to post her frustration with a particularly problematic student, who she referred to by name, as well as the girl’s older brother who had likewise been difficult to handle.

Douglas, one of the high school’s social studies teachers, who came to the district just a year before Kate arrived, took advantage of this opportunity to post a long series of thoughts regarding the plight of the immigrant student and the role of language, culture,
and the flattening powers of technology as variables that might shape the nation’s march toward mid-21st century assimilation. He clearly expected that his missive would receive thoughtful feedback from his colleagues. When they failed to respond, he followed up twenty-four hours later with another post, which simply said, “...?” Knowing Douglas, Kate could hear his wheels spinning. He was clearly frustrated that no one took the time to respond to his passionate six-page post.

In the previous chapter, we discussed the fact that one of the basic mistakes Kate made was failing to engineer a collaborative space designed to elicit productive levels of communication within the virtual team process. In addition to these Level 1 strategies, those who organize virtual teaming must also attend to Level 2 considerations, which involve strategies for e-collaboration. These strategies refer to the specific approaches, protocols, and performance expectations that must be established if collaborative learning spaces are to produce the best opportunity for teams to collaborate and learn. Even if Kate had strategically engineered the collaborative spaces in a thoughtful way (Level 1 construction), the lack of adherence to these best-practice e-collaboration strategies threatened to derail meaningful progress. In this chapter, we address the strategies for e-collaboration and specifically describe how application of these strategies can help educators get the most out of their virtual teams.

**The Big Picture**

In order to successfully utilize virtual learning spaces to stay connected and take collaboration within a PLC to new levels, some specific strategies must be followed. Before introducing these strategies, however, there are four important big-picture issues about e-collaboration to keep in mind.

1. The PLC process is still the focus.
2. Collaboration is about people and process, not platform.
3. Social media can affect online interaction.
4. Virtual collaborative space is not hack proof.

The PLC Process Is Still the Focus

Virtual learning teams must remain faithful to the PLC process, even when working online. This is true of school-based teams within a PLC utilizing virtual teaming to enhance their work. It is also true of any experimental or virtual team organized for a specific term, perhaps created in pursuit of a specific learning goal or objective. Remaining doggedly faithful to the PLC process, and the commitment to working as a team, creates greater levels of consistency and focus and better outcomes.

Every collaborative team in a PLC must constantly link its work back to the mission, vision, collective commitments, and goals that serve as the foundation of the PLC process. With virtual teams, this foundation is particularly important. Members must have processes in place to remind them of their promises to one another and the shared goals that require their collective efforts to achieve. Every meeting should be purposeful in advancing the work of the team. When it comes to reminders about purpose, commitments, goals, and core elements of the PLC process, redundancy is a virtue.

Remember that the primary objective is excellent implementation of the PLC process. The use of virtual teaming and virtual collaboration are some of the tools of the trade to help make that process more powerful.

Collaboration Is About People and Process, Not Platform

The platforms that we use and the technology that enhances our collaboration continue to evolve. As soon as this book is published, there undoubtedly will be innovations taking place to change a team’s capacity to connect and improve what it means to create a virtual learning space. However, no matter how many of these iterations occur in terms of virtual learning platforms, it is absolutely essential
that participants remember that collaboration is about people and process, not the platform or technology used to achieve the goal.

Teams have certainly been derailed by the technological bulkiness of a particular platform or the lack of certain tools that make connection easier, and leaders of virtual teams should continue to strive for improved learning platforms. They should not, however, make platform challenges the focus of the team. Teams must use the platforms available to them today, use the PLC process to grow and evolve as a team, and strive continuously to improve their ability to operate as a team.

One of the simplest ways a team can demonstrate this commitment is to accept the bumps and flaws of any platform they are using and continue to focus on the opportunity to collaborate. Over the years, we have observed some virtual teams experience minor anomalies of the learning platform or frustrations associated with virtual engagement, wherein these issues became the focal point of complaints. Anyone reading this book has undoubtedly experienced the frustration of imperfect technology. However, keeping the focus first and foremost on the goals of the team and the people involved in the collaboration is time better spent than searching for the next best generation of technology.

Social Media Can Affect Online Interaction

One of the unique advantages of working online is that we can collaborate from anywhere. With virtual teams, a busy mother can connect with her iPad and participate in an asynchronous learning opportunity while waiting for her children to finish a gymnastics lesson. A busy coach can find a resource on her smartphone and link it to the group just before going to bed.

While all of these opportunities to connect are signs of progress, educators also must be mindful of the unique challenges created by ever-expanding access to technology. When people are working from their cars, coffee shops, or homes, they must fight the tendency to
replace a professional learning context with a context of interaction driven by the informality or freedom of social media. Reports have surfaced about educators making ill-advised posts on Facebook or engaging in inappropriate relationships with colleagues or students as revealed in an online picture or post (Atkeson, 2014). In most cases, these interactions occurred at offline hours when the educator was in a more informal social context and, therefore, overlooked the need for professional levels of communication. Perhaps they would not have made that damaging Facebook comment, post, or Instagram blast had they been sitting in their classroom under the auspices of the professional surroundings of their school.

To overcome this challenge, teams must be mindful that these collaborative learning spaces are indeed meant for professional learning. Members can certainly have fun online, and we encourage them to do so. Humor and collegial interaction can create a fun context for learning. However, this expression shouldn’t go too far. Erring on the side of caution, especially in a virtual learning space where misunderstandings can emerge, is a safer route to take. Had Kate implemented this strategy early, she might not have had pictures of beagles and discussions of women’s ability to sort out suitable men in the learning space intended to develop strategies for serving her growing EL population. While the jokes about beagles and men may have indeed resulted in some howling laughter (please forgive us), the message demeaning men doesn’t contribute to a positive learning environment and can create confusion regarding the professional context a collaborative space is designed to support.

**Virtual Collaborative Space Is Not Hack Proof**

Educators should assume that any space in which they are working together posting information and reflecting could be hacked by somebody from the outside. In 2014, 5.6 percent of cyberattacks were education targets (Passeri, 2015). Students, for example, may be interested in procuring a copy of a test or seeing a sample of potential test questions on upcoming exams. Community members desirous of
embarrassing the district or a particular teacher may utilize hacking skills to get into these private learning spaces and wreak havoc. The steps technology experts take to prevent hacking often lag behind systems to hack. Therefore, keep hacking in mind as you enter into team conversations, and reflect on the potential for outside eyes to potentially view what is being said or posted.

Seven Strategies for Thoughtful Threaded Conversations

In this section, we present seven strategies that, if used consistently, help create asynchronous collaborative spaces that are full of rich, meaningful expressions leading to new team discoveries and innovations. While these seven strategies are fairly simple to implement, they have a significant impact on the types of conversations that emerge and the level of creativity that results. These seven strategies include the following.

1. Make connections first, and then collaborate.
2. Remain private and respect privacy.
3. Maintain appropriate commentary length.
4. Commit to active involvement and encourage others.
5. Ask for clarification and deeper analysis.
7. Avoid declarations of right or wrong.

Make Connections First, and Then Collaborate

When forming a new team, people typically begin by establishing a social connection. They make eye contact and develop social ties before they focus on the work at hand. This is an instinctual reaction in which human beings engage as a mechanism for creating higher levels of interdependence (Achterman & Loertscher, 2008).
When people come together, they quickly examine the safety and security of their surroundings and attempt to read their colleagues. The more accurately they are able to assess the setting and their associates, the more likely they are to identify problems ahead of time and make adjustments accordingly. This is what it means to be human and, unfortunately, this social context can prove difficult to establish online.

The need for this social interaction has led to dramatic increases in the use of services such as Skype, FaceTime, GTM, and other tools for creating more authentic human connections in which team members see each other’s facial expressions rather than rely solely on voice or text-based interactions. As a result, virtual team members should consider the following when attempting to make connections.

When educators walk into a face-to-face team meeting in their school, they can observe colleagues and begin to establish a sense of their level of engagement, awareness, and comfort. For example, we tend to notice things like body language, facial expressions, and preparedness. All of these subtle clues can tell us about a person’s mood and give us cues as to how we should interact when we get together. Unfortunately, virtual teams don’t have this advantage, and therefore, team members must make a conscious effort to establish a sense of connection and make sure that team members are aware of our moods and intentions. In fact, in most cases, it is advantageous to somewhat exaggerate your attempts to communicate this information to avoid misinterpreting mood or message. Examples of these ideas include the following.

- **Use people’s names.** In both virtual and face-to-face interactions, people love to hear their names being utilized. To establish a stronger connection and create a friendly context for interaction, members of virtual teams should address one another by name.

- **Be mindful of punctuation.** Use punctuation that reflects your mood. If you are enthusiastic about
something, use exclamation marks to help readers understand your message. Recently, while at a coffee shop, Casey heard two women talking about a text one of them had received from a man she obviously was hoping to get to know a little better. He had responded to one of her messages with three exclamation marks. The women were actually counting the exclamation marks, because they interpreted each extra mark as an indication of his level of interest. In that virtual transaction, punctuation clearly mattered!!! It matters with virtual teams as well.

• **Say “hello,” “thank you,” and so on.** When connecting in a virtual learning space, it is important to once again think about how you would interact with others if you were meeting face to face. Starting off a conversation with a friendly greeting goes a long way in setting the right tone. Concluding your statement with a “thank you” or some sort of affable conclusion helps to keep the interaction upbeat and personal.

• **Check for errors.** When educators make a mistake in a virtual learning space, it hangs there for everyone to see. This can be particularly dangerous as technology attempts to correct spelling, perhaps leaving a new word that makes little sense if left uncorrected after proofreading. Educators must remember that whatever they post is literally written in their own voice. When somebody reads the post, reflection, or thread, they are imagining your voice behind those words. Misspelled or unintended words within the text can obscure or detract from the message, so educators should review posts carefully before submitting them to others.

• **Be careful when using icons and abbreviations.** It is important that members of a virtual team use icons effectively. Icons can convey the emotion behind a
message. For example, which message would you rather receive from your virtual team leader?

Reminder: The report is due at 2:00pm.
Reminder: The report is due at 2:00pm. 😊
REMINDER: THE REPORT IS DUE AT 2:00PM!

As stated earlier, we tend to look for emotional set points in others as we try to communicate. If we don’t recognize set points in written correspondence, we could assume the worst. In fact, to some people, the lack of establishing an emotional set point with words, abbreviations, or greetings might be interpreted as a cold shoulder or an exclusive focus on tasks and disinterest in personal relationships.

Educators also must be careful with abbreviations. In many cases, abbreviations may not be familiar to those who are receiving them. Several years ago, while working with a group of educators in a virtual learning space, Casey discovered that one of the learners responded to a funny comment from a colleague by writing *lmfao*. He explained to that learner, a faith-filled southern lady with great enthusiasm for students, that according to Internet slang, her abbreviation had referenced both the “F word” and her own posterior. To her embarrassment, that profanity had hung in asynchronous space for a full day before she took it down. While there is a funny element to this story, the moral is: don’t rely on abbreviations, particularly when there isn’t absolute clarity regarding the exact meaning.

**Remain Private and Respect Privacy**

This suggestion gets at the very real habit of some people who share too much information online about themselves and about the people...
around them. It also is important because educators must remember that these learning spaces are generally subject to Freedom of Information Act requests. Put another way, educators should not post anything in these public spaces that they wouldn’t feel comfortable having a community member read aloud at a board meeting.

This particular suggestion for e-collaboration calls on educators to maintain appropriate decorum. They should not share inappropriate amounts of information about themselves or their students. In fact, they should refrain from identifying particular students by name. Addressing general trends in student behavior or academic performance at certain levels is certainly fine. Diagnosing family problems about a particular student or describing other personal issues simply shouldn’t be done online.

Finally, sharing too much can have a chilling effect on the willingness of others to communicate. When people share too much, readers are often uncertain how to respond. In the worst-case scenario, people chime in with their own tales of woe, and suddenly, the learning space is transformed into an indulgent, cathartic process of over sharing. Other times, no one responds and crickets chirp, creating a socially awkward situation for all participants.

Educators must recognize that careers have been altered because people shared too much in virtual spaces. Angry, vitriolic, or insensitive postings can be destructive, and a team that is looking out for the welfare of its members might redirect their colleague to the focus and goals of their collective effort.

As is true with managing people, it is almost always inappropriate to punish people in public. For example, once while interacting in a virtual learning space, Casey noticed that a participant seemed to be increasingly agitated. Her responses to questions within the threaded dialogue were short and rather abrupt. As the days progressed, her responses began to sound irritated and angry. At one point, she explicitly questioned the professionalism of one of her colleagues. Casey recognized the need for intervention but also knew he had to counterbalance the need to intervene with the priority of
making sure he did so in a way that the individual didn’t lose face or feel humiliated.

In a situation like this, it is essential to reach out to make a connection, diagnose the situation, and help work through the problem to find a solution. The best course of action in this context is typically to take that conversation offline. If possible, the meeting to address the problem should be face to face. If such a meeting is not possible, consider using Skype or another tool for visual interaction.

In this example, the individual was having an extremely difficult week personally. Exhaustion and distractions led her to take out her frustrations on her teammates. By connecting with her offline and determining the issue, Casey was able help her correct her interactions and move forward in a positive way without calling her out in front of her colleagues.

There may be times when an inappropriate post should be removed immediately rather than left hanging in virtual space. Just as a thoughtful school leadership team removes graffiti that is degrading or demeaning, negative or disempowering posts of this nature should be removed as well.

We also must remember to respect people’s privacy. To that end, it is inappropriate to share the thoughts, ideas, or opinions of others without their permission. When educators share the thoughts, ideas, or opinions of others in a virtual learning space, they must ensure that their citations are accurate. Misrepresentation of authors, scholars, and research occurs far too frequently in education. For example, Marzano’s (2009) research on high-yield teaching strategies was frequently used as a checklist for teacher supervision, as many readers interpreted his findings as stipulating that these were the only effective strategies or that they were universally effective. This tendency to misrepresent his conclusions led him to publish an article to set the record straight. He writes:

The lesson to be learned is that educators must always look to whether a particular strategy is producing the
desired results as opposed to simply assuming that if a strategy is being used, positive results will ensue. If a strategy doesn’t appear to be working well, educators must adapt the strategy as needed or use other strategies. This is yet another reason why teachers shouldn’t be required to use specific strategies. Since none are guaranteed to work, teachers must have the freedom and flexibility to adapt or try something different when student learning isn’t forthcoming. (p. 35)

Members of a PLC must be certain to avoid presenting misinformation to their colleagues. Bad information may lead to bad decisions. Educators also must avoid sharing their colleagues’ thoughts and ideas without their colleagues’ explicit permission. The same person who is willing to share an idea or opinion in a personal email may strongly object to that same email being posted to a collaborative learning space. The sense of trust necessary for collaboration can be badly damaged if a message intended for an audience of one is shared with an audience of many without the author’s approval.

Maintain Appropriate Commentary Length

In the scenario that opened this chapter, Douglas violated the very foundation of what it means to collaborate and connect online. In a social context, Douglas had the sensibility to monitor his own airtime and avoid dominating the dialogue. Unfortunately, when it comes to virtual, collaborative spaces, participants like Douglas don’t always apply that filter. In Douglas’ case, he thoroughly enjoys the writing process and synthesizing a multitude of ideas, responding on the thread with lengthy commentary about the plight of immigrant students. But part of good writing is keeping the audience and the purpose in mind. There is a significant difference between expressing thoughts and ideas in lengthy, scholarly, formal expository writing versus the conciseness of writing to present ideas in a virtual space. While Douglas might have seen his post as an opportunity to present a mini paper, his colleagues are likely to view his verbiage as an attempt
to dominate the discussion or as an opportunity to filibuster to prove his point or win an argument.

From the standpoint of social media, blog space offers a more appropriate forum for Douglas’ essay. He could then invite his team to review the blog to assess his thinking. If his goal is to create a thoughtful discussion, allowing all participants to learn something new and potentially synthesize the information, he should either create a different format to elicit reflection and conversation or synthesize his salient points to better fit with the team’s learning space. Although the complexity of the topic and interest of participants plays a role in making these decisions, limiting posts to two or three paragraphs in a learning space is a good rule of thumb.

**Commit to Active Involvement and Encourage Others**

Collaborating in an asynchronous learning space is not unlike going to a party—no one wants to be the first one in the room. Furthermore, if a party is quiet, it usually requires committed engagement on the part of enthusiastic partygoers to get the conversation started. To a great extent, this social dynamic is true in virtual learning spaces as well. Generally speaking, there’s nothing more discouraging to a virtual learner/collaborator than to log in and see that there is very little discussion going on. The lack of activity is analogous to the party that simply hasn’t started yet. Specific steps to get the party started might include the following.

1. **Check in consistently.** While the PLC process calls for teams to develop their own specific norms and protocols, we highly recommend that one of those commitments include the promise to check the space within a designated time frame. Perhaps the commitment would be to check the space at least two or three times a week, and with each visit, make some contribution. That contribution could come in the form of a response to another person’s discussion or
perhaps a commitment to creating an original post. Honoring this commitment has a positive effect on the team, because members are much more likely to participate if they see that others are responding to what they say.

2. **Elicit responses from everyone.** One of the many advantages of discussion boards for virtual teams is that they can create a sense of equity among participants. Equity is enhanced when thoughts and ideas trump longevity, gender, size, and voice. Therefore, participants should encourage everyone to make meaningful contributions. Sometimes those quiet voices on the team are more comfortable in a virtual collaborative space where they don’t have to fight for airtime in a conversation. Encouraging others to actively engage and communicate their thinking is everyone’s job on a team.

3. **Ask everyone to commit to promoting collaboration.** While your team may assign specific responsibilities in terms of facilitation and leadership, in a truly dynamic virtual learning space, every team member is committed to creating a rich, authentic, and dynamic environment. Promoting and enforcing the rules described here should be the responsibility of every team member. Drawing out the thoughtful opinions of others, helping avoid what could be crippling mistakes, and enforcing the rules of etiquette is everyone’s responsibility. The quality of this learning space is determined by the commitment of each member to making the space a positive learning environment for all.

4. **Make sure every post elicits at least one or more responses.** Virtual learning spaces have a way of sorting out good ideas from those that are less
promising. Teams should agree, however, that any idea submitted warrants at least some response. Every member of the virtual team should commit to ensuring that no original post in a discussion space is allowed to hang without some level of feedback or at least acknowledgement of the issue. This creates the expectation that ideas are honored and all thoughts are considered. Failure to make this commitment can give the impression that less worthy ideas are punished by being ignored.

**Ask for Clarification and Deeper Analysis**

As mentioned before, it is extraordinarily helpful to provide at least some feedback to every initial thread posted. This motivates members to engage fully, knowing that their words are read. One of the most powerful steps participants can take to ensure active engagement in this process is to ask for clarification or to present probing questions when an important point is presented. If, for example, a member of the team posts an interesting strategy for engaging students early in a lesson, asking for clarification or further illustrations can strengthen the dialogue. The inquiry could generate curiosity in other members who may have only glanced at the thread. It could inspire the person who initiated the post to be more thoughtful regarding his or her own instructional practice and the evidence of learning supporting that practice. It could lead to the entire team launching an action research project to test their colleague’s hypothesis.

A word of warning, however: team members should not seek clarification or ask for a deeper analysis if they really don’t want it. If an idea posted doesn’t stimulate curiosity, participants shouldn’t ask for clarification just to be nice. Ideas that aren’t particularly strong or moving shouldn’t be patronized by insincere requests for clarification. As stated previously, team members should honor the work of others and acknowledge everyone’s contributions. Not every idea,
however, is worthy of exploration and deep analysis. That is the reality of adult learners working in a collaborative space. But when ideas generate genuine interest, seeking clarification and presenting probing questions only improves the quality of teamwork.

**Share Sources and Links**

Sharing sources, links, or other resources is also a very powerful way to create a more dynamic learning environment. If participants recognize that one of the important steps in building shared knowledge is to bring sources to the learning space, members begin to see these spaces as more beneficial and meaningful. If, for example, a team of teachers tries to discover an effective approach to teaching a particularly difficult concept, members could post a series of links, video demonstrations, and other tools for the group to consider. Through discussion threads, reflection, and ultimately some experimentation, teams could begin to use these sources and reflect on their impact on students. The other advantage of utilizing virtual learning spaces for this type of work is that it is much easier to catalogue resources, keep them organized, and continue to apply them in a thoughtful and focused way.

**Avoid Declarations of Right or Wrong**

In order for quality online learning experiences to emerge, participants must feel safe enough to take risks, experiment, and openly inquire about ideas they don’t know much about. The presence of toxic interactions, negativity, or the compulsion to prove oneself right and others wrong significantly diminishes the quality of team interactions, particularly in a virtual team. A snarky or sarcastic comment in a meeting can create an awkward moment, but that same comment in virtual space can hang forever and be repeated numerous times in threaded conversation. In this situation, the wound is difficult to heal.

Effective teams avoid declaring winners or losers or focusing on proving a colleague to be “dead wrong” about an idea he or she
shares. They recognize that engaging in collective inquiry is vital to the PLC process, and intellectual curiosity and openness to others’ ideas are essential elements of collective inquiry.

It is equally true, however, that the PLC process is intended to build shared knowledge rather than merely pool opinions. Not every idea is a good idea, and assertions shared without evidence should be addressed. We recognize that we are calling for a delicate balance here. On the one hand, team members should be open to the ideas of others; but on the other hand, the team is seeking to identify promising practices that are grounded in evidence.

Peter Senge and colleagues (Senge, Kleiner, Roberts, Ross, & Smith, 1994) offer a useful protocol for addressing this dilemma. Rather than simply dismissing a colleague’s assertion as wrong, consider using the following protocol.

- Ask your colleague to present the evidence and examples that support the assertion.
- Use unaggressive language such as “Help me understand” rather than “What do you mean?”
- Draw out your colleague’s reasoning to understand why he or she is making the assertion.
- Explain your reasoning for presenting questions.
- Compare your assumptions and evidence to your colleague’s. Where do you have common ground, and where do you differ?
- Ask for broader contexts or examples of his or her assumptions at work.
- Check your understanding of what your colleague said.

Once team members become accustomed to the fact that they will be asked to present evidence to support their proposals as a routine part of team process, the team is far more likely to focus on building shared knowledge rather than pooling opinions.
For example, several years ago, Casey was working in a virtual learning space where participants were discussing the psychological safety of today’s schools. Several participants contributed to a thread that reinforced their perception that schools were more dangerous than ever. Perpetual 24/7 news alerts notwithstanding, the hype around school violence is different from the reality. The statistics are clear that over the past generation, schools have gotten increasingly safer (United States Department of Education, 2014). The number of violent acts in all areas has decreased.

Casey responded by honoring the interest of participants in keeping schools safe, and then presented the relevant statistics. Instead of using the data to declare them wrong, he stated the facts, cited the source, and then presented a series of questions such as: How do you interpret the data? What are the implications? Is there good news when it comes to school safety? The focus was on building shared knowledge rather than declaring that others were wrong.

**Conclusion**

No team should be expected to master all of these strategies at once. Becoming skillful in applying them is a work in progress. However, consistent application significantly enhances the climate and culture of all the interactions that happen both in virtual space and face to face.

After carefully engineering the e-connection (Level 1) and then thoughtfully embracing and applying the strategies of e-collaboration (Level 2), new opportunities for adult learning should emerge. In the best-case scenario, with practice, these process points ultimately lead to the development of new individual and team capacities, as well as a significantly improved capacity to establish, maintain, and apply heightened levels of shared knowledge. In the next chapter, we address additional steps teams can take to further enhance team learning through strategies of e-acceleration (Level 3).
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