

TAO

Community & Collaboration

TAO Project Deliverable D 4.3 a

Concept of the TAO Handbook and Community of Practice

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Version 1.0
Due: 31st July 2012
Submitted: 31st July 2012



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Commented Summary of the Review (incl. corrective action / date of the review)	
8 May 2012 Correction of description of a chapter in Annex I; suggestion to cooperate more closely with TAO Community Partners in the Community of Practice (chapter 4.2.1 and 5).	
Date of acceptance of the deliverable	
14 May 2012	



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Executive Summary

The present report proposes a concept for the Handbook and Community of Practice (CoP) that are to be created in the framework of TAO. It elaborates on the aims, , structure and tools for both the Handbook and the CoP.

The TAO Handbook targets individuals and organisations wishing to include older adults in online communities. It will include detailed results from research done in the framework of TAO and experiences made by the TAO consortium as well as by members of the CoP. All contents will be presented in an easy-to-access, comprehensible manner. The TAO Handbook is created on the collaborative Wikiversity, i.e. all contents can at all times be modified by interested users.

The Community of Practice should include a significant number of actors in fields related to TAO, i.e. facilitating and promoting access of older adults to online communities and collaboration projects. It will be involved in drafting and amending the Handbook. An important aim is attracting new members for the Community of Practice. This may be achieved through offline events, network communication and personal guidance for newcomers. The Community will be administrated by a core group of members and will meet regularly online. Various other tools will be set up to improve cooperation and activity in the Community of Practice.

1 Introduction

1.1 Overview of the Deliverable

The TAO project proposal foresees the creation of a (draft) handbook by the end of the project. This handbook is supposed to provide “community consulting, based on an inventory of methods for “mobilization” and “inclusion & motivation” for both Wikimedia communities and older adults’ communities, accompanied by guidelines for the use of these methods in practice.” It is thus closely linked to TAO’s overall aims: facilitating and promoting access of older adults and people in early retirement to online social communities and online collaboration projects.

For drafting the Handbook, the Evaluation and Advisory Board of the project suggested to draw upon the experience of a Community of Practice. Further, the evaluators at the mid-term review meeting expressed the wish to see concrete project results in the Handbook.

Based on these requirements, this paper aims at providing a concise concept of the Handbook and Community of Practice (CoP). It starts out by setting goals to be reached by the end of the project, stipulating contents to be included in the Handbook and how they should be drafted. It further gives a general idea of the structure for the Community of Practice, suggesting tools for managing it.

1.2 Connections to other Deliverables

The Handbook described in this report will be filled with contents from subprojects 1, 2, 4 and 5. Hence, there are connections to most of the deliverables from these subprojects, for instance the report on the different community activities (D 4.1) and the results from the preliminary studies on IT and Web 2.0 use by older adults and volunteers (D 4.2).

The contents of the Handbook and experiences made with the Community of Practice will serve as a basis for TAO consulting (cf. D 1.1/1.3 on the TAO Business Model).

1.3 Value Added by the Project TAO

The Handbook and Community of Practice are pure TAO activities that would not be created without the project. The same is true for this report.

2 Objectives for the TAO Handbook and Community of Practice

The TAO partners will work on reaching the following aims concerning the Handbook and Community of Practice by the end of the project:

- The Handbook is a useful tool for organisations and individuals wishing to involve older adults in their community's activities. It gives practical guidelines and background information and can be used as a basis for consulting activities.
- The Handbook includes all results of TAO that are relevant to the project and Handbook aims (clearly designated as project results).
- All information is presented in an easy-to-access, comprehensible way.
- Its contents are continually enhanced by editing and adding relevant experiences made by project and non-project members of the community of practice.
- The contents (modules, resources) on the website of the Handbook and Community of Practice are interlinked according to their topics.
- The Community of Practice involves a significant number of actors in fields related to TAO. It is an attractive way to exchange and is regularly used as such by its members, even after the project's end.
- The Handbook remains open to modifications by the CoP after the project's end.
- All contents of the Handbook are produced under the Creative Commons Attribution/Share-Alike License (CC-BY-SA), meaning they are free for use, dissemination and modification.

3 Handbook

3.1 Concept

Generally speaking, the Handbook targets organisations and individual facilitators wishing to include older adults in the activities of their online community (cf. Chapter 2.2 Community of Practice).

The handbook will be composed of

- relevant project results of TAO from research and the evaluation of project/partners' activities and
- experiences made by the (other) members of the Community of Practice.

The Handbook may thus include sections on TAO activities, methods and instruments, technical and pedagogic tools, background information (e.g. on older adults' and volunteers' needs) etc. On the one hand, the TAO project community partners' activities provide a basis for the documentation in the Handbook. On the other hand, the experience and comments made by external community members can help to improve the TAO partners' research and other activities. All contents are to be drafted and presented in a way that is adapted to the aims and target groups of the Handbook. Following the Wikiversity principles, all contents will be open to modifications by members of the Community of Practice and any other interested users. During and after the project TAO, the handbook contents will thus be liable to change. For a provisional list of the Handbook contents, see Annex I.

Contributions from the Community of Practice will be evaluated by users and project partners according to their usefulness and maturity. Towards the end of the project TAO, the TAO consortium will make a selection among the contents published in Wikiversity, based on the evaluation of the users. The chosen contents will be published in paper or other version as an output of the project. That notwithstanding, all contents will remain on Wikiversity and hence at the hands of the CoP, which can continue to amend the modules. For an illustration of the relation between Handbook and CoP, see Annex II.

3.2 Drafting the Handbook

The Handbook will be drafted in the collaborative Wikiversity, which hosts learning modules that are freely accessible and that anyone can edit. A TAO Wikiversity has been created and will be upgraded and updated regularly (<http://en.wikiversity.org/wiki/TAO>). The contents mentioned above (chapter 3.1) and in Annex I are presented in sections, which are made up of modules with introductory texts and resources.

Users can access the TAO contents via different entry points, according to whether they are looking for knowledge (direct link to the Handbook sections) or wish to share their experiences/add new content (access via the Community of Practice). Four alternative entry points are foreseen according

to the position of the visitor: staff in a managing function, teachers/tutors, consultants and people wishing to support the community. An additional entry point is for those who do not identify with any of these categories.

Creation of modules

All users have the possibility and are encouraged to create new modules or edit existing ones. The handbook contents will thus be constantly amendable. All entry points mentioned above will allow for access to the same pool of modules via interlinking, but via a different path of linked pages. All modules will be grouped in the handbook sections – newly created modules just like those having reached a higher amount of maturity.

While creating or amending the modules, users will be encouraged to think from the target group's perspective. This is encouraged by supplying them with personas representing target users and by the collecting typical questions of the target group – online and in face-to-face meetings.

Module templates will be provided to facilitate the creation of new modules.

To make sure that important terms are used in the same way by all users of the Handbook, a glossary of important terms is being set up in TAO Wikiversity.

Editing

Users should have the opportunity to rate the maturity and usefulness of each module via an evaluation tool in the module, also allowing for comments. The feedback thus given will be evaluated by members of the TAO consortium and other users, and influence the form and contents of the Handbook.

Adding to this, continual editing of the Handbook website is extremely important for creating links between related contents and for keeping the entry points up-to-date. This editing will at first be assured by the TAO project partners.

Final project handbook

Near the end of the project, the TAO consortium will make a choice of contents in TAO Wikiversity and collect them for the Handbook as announced in the TAO description of work. This published version will be a snapshot of the TAO Wikiversity contents, with modules drafted by both the TAO partners and others, and will give reviewers of the project insight into the results.

Language

The main language of the handbook, in the drafting process and afterwards, will be English. The translation and/or creation of contents in other languages is desirable, but, given the limited staff resources, not a priority.

4 Community of Practice

4.1 Concept

The Handbook will be drafted, used and possibly amended by a Community of Practice. *“Communities of practice are groups of people who share a concern, a set of problems, or a passion about a topic, and who deepen their knowledge and expertise in this area by interacting on an ongoing basis.”* (Wenger/McDermott, 2002, p.4) The TAO Community of Practice aims at including actors in fields related to the TAO aims (facilitating and promoting access of older adults and people in early retirement to online social communities and online collaboration projects). Besides including individuals and organisations from the TAO consortium, the community will be made up of actors implementing online or offline activities within TAO or in fields related to TAO, such as training, teaching, collaboration or support for older adults. These actors may be researchers, heads of organisations, consultants, organisers or moderators of educational courses, volunteers or simply interested individuals. The TAO Community Partners will be important members of the CoP, but decide on the degree of their involvement individually.

The community can bring relevant experiences, ideas, reflexions and suggestions to the Handbook, creating new contents or reviewing already existing ones (cf. chapter 3.2 Drafting the Handbook). Problems and questions may be raised and solved by the community – its involvement will thus not only benefit the Handbook but also the community members themselves. It is an aim to attract stakeholders from different countries to the Community of Practice, i.e. with the help of a facilitating organisation in each targeted country.

4.2 Establishing and Administrating the Community of Practice

4.2.1 Finding Members

A crucial issue is how to get and keep actors involved in the community. Participating in it has several advantages: sharing experience, benefitting from others' experience, improving the visibility of their activities or enlarging their network. But in order to keep the community alive, it needs to be made known, and its members need to be encouraged to participate actively (lurkers always being much more frequent than active contributors). To this aim, the TAO partners have thought of different strategies.

Once TAO Wikiversity is prepared for a larger public access, the TAO partners will disseminate the opportunity to participate through their networks.

As face-to-face contact has a strong motivational effect, this way of attracting and bonding among interested persons will be used as much as possible. During the project, TAO working days will be

opened to potential community members in order to attract new participants (including contents-related and social sessions). Other ideas include the implementation of a Grundtvig Learning Partnership to exchange best practices on international level or the submission of an Erasmus Multilateral project proposal to involve more partners in the CoP. Also, the consortium will approach various Wikimedia chapters and present the project at Wikimania. Once the community is established, personal meetings could be organised on a regular basis. A difficulty will be to find funding for these activities.

Personal contact might be established between Community members in online meetings in conference rooms, which are already being implemented within the consortium. Newcomers should be given a specific person to be contacted personally (by e-mail and/or telephone) in case they have questions (mentor).

English will be used as the main language for the Handbook and CoP communication – at the current stage, using other languages would either result in a splitting of the Community or demand too many resources for translation. However, the creation of Community sections in other languages is a long-term aim of the TAO consortium. It may be reached by assigning the role of leaders/starters of national sections to active organisations from the partners' networks, familiarizing them with the CoP and training them to set up a section of it in their home country and/or native language.

4.2.2 Administrating the Community of Practice

Members of the Community of Practice are welcome regardless of how intensely they wish to get involved – there may be readers, contributors and persons wishing to participate in the administration of the CoP. Personal contact between individual members of the community, by mail or in person, should be made possible, e.g. through a profile in TAO Wikiversity.

Core Group

A core group of administrating Community members will assure the functioning of TAO Wikiversity and the communication channels between CoP members, also directing initiatives aimed at reaching new members or activating existing ones. This core group will at first be made up of TAO consortium members. It is an important aim to include other CoP members in the core group, starting during the project duration of TAO. At the project's end, the core group should function independently of the project consortium and ensure continued administration of the CoP.

Meetings

Members of the Community of Practice regularly meet online, currently 1-2 times per month. These meetings will be open to all interested members of the Community of Practice. Aside meetings of the core administration group are an option for dealing with organisational issues once the group in online meetings has reached a critical size.

Updates and News

The TAO Wikiversity will regularly be updated with news, e.g. about upcoming meetings or topics of interest to the community.

Mediators

An internal mediator should be designated for potential conflicts among the community members. For editing conflicts, Wikiversity has set up a system of mediators that can be used. For other conflicts, the TAO team will step in. For the case of conflicts occurring in the core group, an external mediator should be identified in advance. Until the end of the project TAO, the internal TAO mediation set-up can be used.

4.2.3 Tools

Different tools have been or will be established to allow members of the CoP to get into contact with each other by e-mail or other online tools.

A mailing list for the community has already been created and is being used as the main means of communication among its first members.

The creation of a forum was proposed to enable community members to discuss specific issues. Yet, this could have a more dividing than unifying effect (as it separates members preferring contact by e-mail from those opting for the forum). A compromise could consist in using tools such as nabble.com, which gives users the option of receiving mails over a mailing list or having them displayed as a forum.

Online meetings between actively involved CoP members already take place in online conference rooms such as Adobe Connect or Big Blue Button. These meetings will be open to all interested members of the Community of Practice. Aside meetings of the core administration group are an option for dealing with organisational issues once the group present in online meetings has reached a critical size.

A list of frequently asked questions (FAQ) will be set up for new community members, introducing them to the target group, aims and tools of the Community.

5 Outlook

The creation of a useful and understandable Handbook is one of the preconditions for successful TAO consulting (cf. D 1.1/1.3) The following list gives a short overview of the next big steps to be taken in order to finalize the Handbook:

- Achieve high usability and attractiveness of TAO Wikiversity (accessibility is a demand)
- Collect relevant project results, drafted in a way that is adapted to the aims and target group
- Explore the possibility of introducing a mechanism allowing users to rate the usefulness and maturity of modules in TAO Wikiversity as well as the other instruments foreseen for the administration of the CoP
- Designate an editing team
- Develop and implement strategy to enlarge and involve Community of Practice; approach potential members that can bring in relevant contents
- In close cooperation with the TAO Community Partners, draw up individual strategies for involving them in the CoP
- Edit modules continually, building on user feedback
- Create list of frequently asked questions (FAQ), one destined at Handbook readers and the other for persons interested in the Community of Practice
- Create a glossary for the CoP and Handbook in TAO Wikiversity

The idea of a Community of Practice seems to meet the needs of people involved in this sector. During the Open TAO Workshop in Ulm in May 2012, all external (non-TAO partner) participants expressed interest in being included in such a Community of Practice. These contacts will be further pursued.

Generally, the TAO partners will continue to cooperate closely for the further development of the Handbook and Community of Practice.

6 References

TAO Website on Wikiversity:

<http://en.wikiversity.org/wiki/TAO> (English)

<http://de.wikiversity.org/wiki/Projekt:TAO> (German)

Osterwalder, A. & Pigneur, Y. (2004): An e-Business Model Ontology for Modeling e-Business. Available online at: <http://129.3.20.41/eps/io/papers/0202/0202004.pdf> - Osterwalder, A. & Pigneur, Y., 2010. Business Model Generation. Hoboken, New Jersey: Wiley.

Wenger, Etienne; McDermott, Richard; Snyder, William (2002): Cultivating Communities of practice: a guide to managing knowledge, Harvard Business School Press.

7 Annexes

7.1 Annex I Contents of the TAO Handbook

Chapter/Title	Description
Introduction	
Description of the idea	<i>This module explains the concept of the Handbook: the topics, aims and principle of cooperative drafting, as well as some comments on the project TAO and a link to its website.</i>
How to use the Handbook	<i>Explains the structure of the Handbook and different ways to navigate.</i>
How to contribute to the Handbook	<i>Includes considerations and hints on how to contribute to the Handbook, e.g. persona approach and description of target groups.</i>
Examples of users and communities	<i>Statements/testimonials of older users/community organisers, that reveal the scope of roles older adults can fulfil in communities and show what benefit they can get from participating.</i>
Practical Considerations and Theories	
Online communities	<i>Definition: What are online communities? What are their assets for older adults? What needs to be considered when preparing older adults for participating in them?</i>
(N) Onliner	<i>Data on Internet use according to age groups and other factors (TAO Survey and other sources)</i>
Volunteers	<i>Roles, transparency, recognition, motivation, care/management</i>
Ease of use	<i>What are criteria for easy-to-use online communities? Are there special considerations to be made for older adults?</i>
Target groups	<i>Whom do we target/different groups among older adults. What are older adults interested in?</i>
Pedagogy: Methods	<i>Which methods can be recommended for teaching older adults how to participate online?</i>
Glossary	<i>Gives definitions of common terms in a Community and suggestions of new terms to be defined; short guidelines on how to draft definitions.</i>
Activities	<i>Collection of introductory texts and case studies. Each of the case studies should include documentation and recommendations. (aims, activities, participants and methods of the activity, evaluation – cf. TAO evaluation aspects). Links: activities will be collected in categories (see left column), but will also be listed by name for direct access.</i>
Initiation and meaningful use of Internet	Introductory text
	Free Cruise on the Internet
Activation and motivation	Introductory text

	Free Cruise on the Internet
Activities with volunteers	Introductory text
Qualifying workshops and courses	Introductory text
	Silver Knowledge
	Facebook activities
	Free Cruise on the Internet
Online cooperation	Introductory text
	Silver Surfers' Social Networking Services
	Online learning activities (ZAWiW)
Community Activities and Facilities	<i>Description of possible activities and features in an online community (mentors, regular meetings...), support services etc.</i>

Online Tools

Videoconference	<i>Skype, Flash meeting etc.</i>
Virtual classrooms	<i>Adobe Connect, Viero, Big Blue Button etc.</i>
e-learning environments	<i>Moodle etc.</i>

Conditions

Cooperation	<i>Ideas for building partnerships (exchange of experience, different benefits)</i>
Public Relations	<i>How to make an online community known to the target group (and general public)</i>
Sponsorship/Fundraising	<i>Finding the necessary finances for one's online community</i>

Methods and Practical Tools

Exploration and evaluation methods	<i>Tools on how to evaluate the success of your community/different measures taken to improve it.</i>
Creative and problem-solving methods	<i>How to identify and solve problems in a team (analysis)</i>
Planning methods	<i>Type of methods to be defined by the authors.</i>
Methods for cooperation and seminars	<i>Type of methods to be defined by the authors.</i>

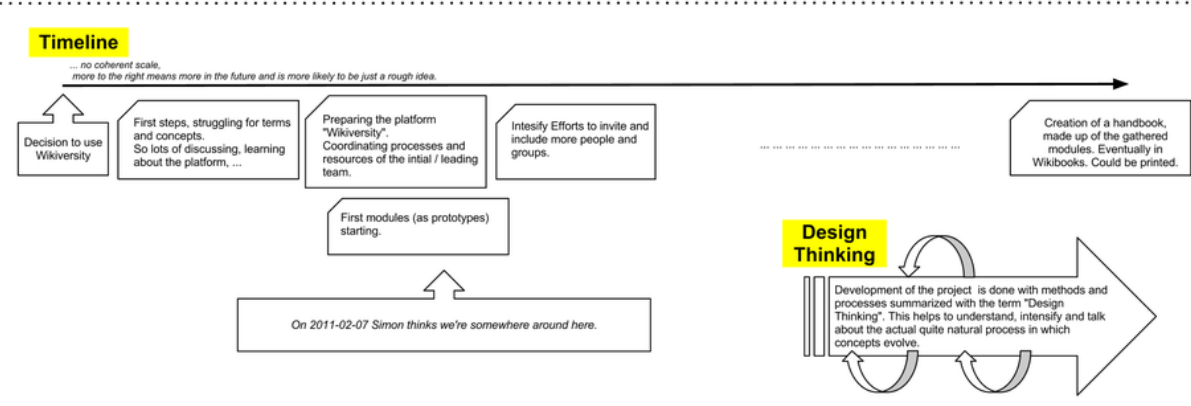
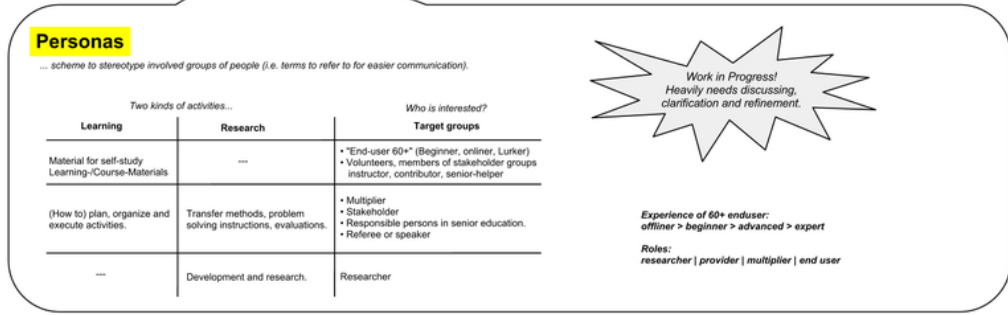
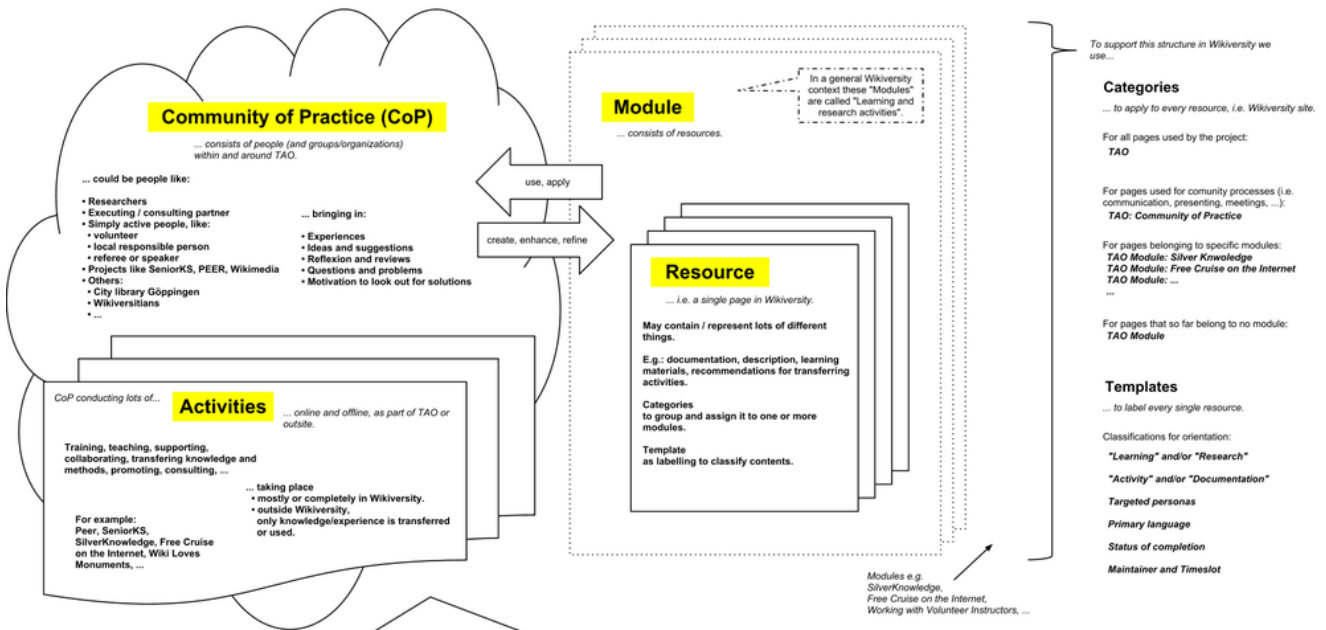
Problem-oriented access

<i>Lacking motivation of community members, Funding, Organising workshops</i>

7.2 Annex II Illustration: The Relation between Handbook and Community of Practice

TAO/Wikiversity: Explanation and Wording - Cheat sheet

This graphic shows a schematic of the TAO/Wikiversity project. The main goal is to explain and define the terms we like to use. For (TAO) activities happening outside wikiversity you probably have to map other terms to the ones used here.



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The project TAO is managed by the Bern University of Applied Sciences and is co-funded under the Ambient Assisted Living (AAL) Joint Programme by the Swiss Federal Office for Professional Education and Technology, the Dutch Ministry of Health, Welfare and Sport, the German Federal Ministry of Education and Research, and the European Commission.

AAL-2009-2-084 TAO

