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Changing Departmental Culture through Strategic Planning

By Lon Dehnert, PhD

Imagine the following scenario: your faculty and staff are meeting in a conference room to develop a long-range strategic plan. A longtime member of the faculty (and former chair), who is quite outspoken and respected by many, begins by sharing her/his input: “Why are we here? What is it that we are going to do that we haven’t done a dozen times before? You know once we’re done, the document will go on a shelf, and we’ll just pull it out each year, dust it off, and resubmit it. And besides, we already have a plan.” After a quick breath, “We are a great department, we already know what we are doing and we don’t have to put it on paper to make it better.” Someone adds, “If it ain’t broke, don’t fix it.”

Many refer to typical departmental planning procedures as the shotgun approach (good things happen sometimes without intentionality or planning). Departmental culture—a set of attitudes, beliefs, and/or values accepted by a group—may be a significant obstruction to quality planning when the culture embraces the notion that good happens even in the worst situations.

Considering the increasing expectations for academic institutions, this isn’t good enough. The American proverb “If you don’t have a plan for yourself, you’ll be part of someone else’s” becomes so apropos. So how can we change the culture of a department to not only accept strategic planning, but also to embrace it?

As a convert to planning, it is my

experience that you must approach it with deliberateness and intentionality and it must be pervasive. The following are what I consider some key steps on the path to a continuous improvement environment.

Determine what the new culture will look like.

The goals for a new culture should include (but not be limited to):

- Increased expectation for participation and engagement in planning
 - To get buy-in, the faculty and staff must participate in the process.
- Increased expectation for participation in goal setting
- Increased expectation for participation in decision making where it affects the faculty and staff
- Increased understanding of the gathering and value of data (results)
- Increased understanding of planning and assessment at all levels
- Increased clarity of emphasis on the whole university/college
- Increased understanding of the linkage between planning and resources, either new or existing
- Hiring personnel with planning experience and understanding of planning at the core

Engage the services of good facilitator.

A good facilitator can help you and your department(s) develop a quality process that works with your situation. A facilitator can also help establish a work-

able agenda that the group sees not as a threat, but rather as an opportunity for input. A good facilitator comes with an understanding of quality tools for continuous improvement (e.g., decision making, team building and facilitation, brainstorming, brainwriting, nominal group techniques, etc.) and the skills to use them, including the skill to balance participation when certain individuals wish to dominate. They also come without a personal agenda. A good facilitator can allay fears quickly and efficiently and get on with the process. To achieve a successful outcome, everyone must leave believing they had an *equal opportunity* for input and that they agreed with the final plan.

Use criteria that work in an academic setting.

The National Malcolm Baldrige Foundation and the Higher Learning

PAGE 6 ▶

In This Issue

- 2 The “Spider-Man Principle” and the “Categorical Imperative”: How to Address the Problem of “Managing Through”
- 4 Overcoming Obstacles to Faculty Participation in Distance Education
- 7 The Changing Nature of Meetings: Hybrid Teleconferencing in Higher Education



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Decision Making

The “Spider-Man Principle” and the “Categorical Imperative”: How to Address the Problem of “Managing Through”

By Jeffrey L. Buller, PhD

“Managing through” is the administrative practice of passing difficult decisions on to a higher level of the organization in order to avoid the consequences of having made an unpopular choice. For instance, a department chair may receive a request from a faculty member that the institutional cap on travel funding be waived in his or her case. If the chair believes that this exemption is unnecessary or inappropriate but that refusing it would cause negative repercussions, the chair might practice managing through by approving the request and hoping that it will be turned down by the dean or provost. The chair may be afraid of receiving a poor evaluation from the faculty member that year or may simply wish to avoid the unpleasantness of multiple appeals and claims that “you’re just not our advocate.” The dean is then placed in the difficult position of either overturning the chair’s decision or managing through again by passing the request on to the provost or president. In a truly egregious instance of this practice, the chair may even call the dean to say something like, “I just wanted you to know that I’ve sent on that travel request we spoke about the other day. I’m not going to be offended at all if you deny it. In fact, that’s what I’m hoping you’ll do.” The result is that the administration ends up playing a form of “good cop/bad cop” rather than deciding each issue on its own merits.

The problem with managing through is that it is simply poor administration. It consolidates all enforcement of rules, budgetary

restraint, and oversight of policies at one level of the institution. Someone (usually either a dean, provost, or president) is forced to serve repeatedly as the “bad guy” and thus may be seen as having refused out of sheer whim or malice requests that were approved at several lower levels of administration. At its worst, managing through can cause members of the faculty and staff

If the people whose decisions you receive observe you avoiding a tough call by passing it on to your supervisor, they are likely to assume that you condone, possibly even encourage, this practice.

to develop a false sense of entitlement, a belief that everything they want or “need” is justifiable, while it is only the “bean counters” in the upper administration who stand in the way of progress. If you encounter managing through at your own institution, what can you do to reverse this trend?

Before removing the mote from another’s eye, be sure that there is no beam in your own.

You can’t solve the problem of managing through if this is a practice you’re engaging in yourself. Administrators lead by example even more often than they often realize. If the people whose decisions you receive observe you avoiding a tough call by passing it on

PAGE 3 ▶

MANAGING THROUGH...

From Page 2

to your supervisor, they are likely to assume that you condone, possibly even *encourage*, this practice. Be sure, therefore, that you set an example of good administrative practice in your area, and be sure to discuss with others the ways in which you make your decisions. Make it clear that you expect a review of all requests on their merits, not on the ease of making the decision, and that all appeals should be given careful consideration before they are passed to your level.

Tie responsibility to decisions.

One of the major reasons managing through is rampant at many institutions is that there are relatively few consequences for engaging in this practice. A lower-level administrator gets to look like a hero by supporting an individual's request or proposal; only the upper-level administrator who denies the request is forced to endure the wrath of the person who is disappointed. The more centralized an institution is (particularly in budgetary matters), the more widespread managing through will be: the level where the decision is made is far different from the level where the consequences are felt, so why not simply "pass the buck" up the chain of command? One workable solution to this problem is to decentralize as much authority as possible while imposing what we might call the "Spider-Man Principle": **With great power comes great responsibility.** In other words, suppose you're the dean who has just received the request for an exemption to the institutional cap on travel funding that was mentioned earlier. When you receive the chair's approval of the request, you have several options.

- You can approve the request because you believe that it's justified.
- You can deny the request.

- You can practice managing through, approve it even though you don't believe the request is appropriate, and pass it to the provost.
- Or you can reunite responsibility with authority.

If you choose the last option, you would tell the chair, "I'd like you to review this exemption to the travel policy that you just submitted to me. If you are strongly in favor of it, I'll approve it ... *but* you'll need to fund this expenditure yourself. So, take another look at it and reconsider how it relates to the rest of your priorities. You may want to keep in mind, too, how you'll respond to all the other requests that you're likely to receive once this precedent is set." By dealing with the matter in this way, therefore, you demonstrate that decisions carry serious implications and you assist the chair in becoming a more effective mediator as a result.

Discuss the issue of managing through candidly within your unit.

Another way of addressing the problems caused by managing through is not allowing this practice to remain invisible. Simply by giving this procedure a name, indicating that you recognize this tendency when you see it, discussing it with those who report to you, and outlining the problems that it causes, you are going a long way toward eliminating its reoccurrence. This discussion gives you an opportunity to clarify your position that you expect decisions to be made for the right reasons, not on the basis of political convenience. "There will always be a need," you might say, "for administrators to grant exceptions or exemptions to various policies. But these exceptions should be granted on the basis of the strategic planning goals that we've all discussed, sound fiscal management, and our own version of Immanuel Kant's **categorical imperative**: make

every decision as though you were establishing a universal law." In other words, what would be the consequences if everyone were required to abide by the decision you made or the exception you granted? In matters of college administration, of course, this principle is often not merely a matter of philosophical speculation. Since subsequent administrative decisions are often made on the basis of precedent, each exception granted at an institution may well *become* the basis for its "universal" law. Finally, in the course of this discussion, assure the people who report to you that, as you review their evaluations, you will be able to tell the difference between genuinely poor management and the sort of grumbling that results after a leader has made a difficult but necessary decision. In fact, you might point out that you consider the willingness to make those decisions to be an indication of effective management.

Some administrators engage in managing through because they would rather be liked than deal with consequences they know will be unpopular. When you to adhere to both the "Spider-Man Principle" and the "categorical imperative," you probably won't eliminate all cases of poor decision-making overnight. You will, however, have taken the first steps toward a culture of greater responsibility in management for the years to come.

Jeffrey L. Buller is dean of the Harriet L. Wilkes Honors College at Florida Atlantic University. He is the author of The Essential Department Chair: A Practical Guide to College Administration (2006), The Essential Academic Dean: A Practical Guide to College Leadership (2007), and The Essential College Professor: A Practical Guide to an Academic Career (forthcoming). (All are published by Jossey-Bass.) ▼

Overcoming Obstacles to Faculty Participation in Distance Education

Teaching online can be daunting for many faculty members. Learning new technology, meeting the needs of online learners, understanding online pedagogy, and managing workload and time are some of the challenges they must deal with. And it is up to academic leaders to provide the support and resources to encourage faculty to teach online and to continue teaching online.

Two researchers at Texas Woman's University conducted a qualitative study of faculty members who have been teaching for at least two semesters to learn what they viewed as barriers to effective online instruction and to explore what administrators could do to reduce or remove these impediments.

Academic Leader recently spoke to these two researchers, Jody Oomen-Early, assistant professor in the department of health studies at TWU, and Lynda Murphy, TWU's director of distance education, about the study and their experiences regarding barriers to effective online instruction on their campus.

The following are some of the themes that emerged from the study and solutions that Oomen-Early and Murphy suggest:

Administrative and institutional support

Impediment: Lack of understanding among administrators as to the time and effort involved in teaching online

"It was truly interesting as we were reading through the data to find out that there was just this overwhelming sense that the administration was out of touch with what faculty were actually experiencing," Oomen-Early says. "For example, workload. The fact that even though e-learning has been in effect for so long, administrators somehow perceived that online classes were easier to teach [than face-to-face classes]."

Administrators didn't understand the time it took to create the online classroom or the prep work it took prior to the first day of class."

Another element of the workload issue was the perception by the faculty in this survey that their institutions tend to "dump" students into online courses as a way to boost enrollment without considering the effect this has on instructor workload.

The extra work involved in teaching online and the administration's lack of understanding make teaching online particularly challenging for faculty seeking tenure. According to Schifter (2002), junior faculty may be reluctant to teach online because of the amount of work involved and the potential for it to distract them from their research, which at most institutions is a top tenure requirement.

On the other hand, the perception of participants in this study was that tenured faculty can and often do choose not to teach online, placing much of the burden on tenure-track faculty.

"I think a lot of faculty are feeling pressure," Oomen-Early says. "My roles as an assistant professor are quite different than some others from years ago, in that I'm expected to not only uphold tenure requirements for publication and teaching, which was research, teaching, and advising, but I'm given this mantle of responsibility now to help with online programs. . . . I'm sure it's different in every university, but when you have a very young infrastructure or no infrastructure, I think the challenges and pressure for faculty are immense. I think that's why you have faculty leaving academia right now, because if you don't have an infrastructure, if you don't have course designers, if you don't have faculty training, if you don't have examples or templates or models for your virtual universities to have a good handle on, I think it can overwhelm you, and that's

where I think you start getting burnout and start getting professors who hear about this and don't want to get involved with it."

With a disproportionate burden for teaching online placed on tenure-track faculty, it is essential for there to be an effective means of giving these faculty due credit for this work, which can be difficult, given a lack of understanding of what online teaching entails.

This lack of understanding was an impediment at TWU to developing an evaluation tool for online instructors. The faculty senate, which drives teaching evaluation, was made up of mostly senior faculty members, many of whom had not taught online and didn't understand the challenges of teaching online. "When I wanted to do something as simple as putting a course evaluation online to give to online students, the faculty senate was totally opposed to it. They were scared that faculty would be evaluated on the technology and not their teaching skills. We've gone through a lot of talk, and now our faculty senate is very much on board with doing online evaluations. But that was a slow process. It was a lot of education that we had to do for the faculty senate because they really didn't understand the issues," Murphy says.

Solutions: Based on their research and experience, Oomen-Early and Murphy recommend the following ways to overcome the impediment of a lack of understanding on the part of the academic leaders:

- Conduct a needs assessment of faculty and students.
- Participate in online instructor training and/or teach an online course.
- Look at the literature to determine what is appropriate enrollment for

OBSTACLES... From Page 4

online courses.

- Provide release time for instructors for course preparation.
- Develop instruments to evaluate online instruction.

“I see the role of the chair as pivotal,” Murphy says. “We’ve done a lot of education with our chairs because we did realize that if the chair is not behind this, it’s never going to work. And it’s amazing to see the change. When I would go in and talk about things like workload before the council of chairs, they would sit there and say, ‘What’s the difference?’ Now I have chairs demanding that we have an alternate workload schedule or plan for distance education. Our chairs have worked hard. We’re also working hard to educate them. We also worked hard to educate our deans. I think now we’re working hard to educate our senior administrators, because many of them see distance education as a money bag. It’s a way to get more enrollment, but they don’t really understand all the things going on in order for that to happen. So we’re really trying to make them aware of the real issues and how much effort it really does take.”

Student readiness

Impediments: Lack of understanding about what online learning entails, lack of technical skills, unrealistic demands

When students are not properly prepared to learn online, they require more support from their instructors and often expect immediate feedback on their assignments and threaded discussion participation.

“We know that, especially with students who are involved with Web 2.0 technology, they are so used to immediacy and feedback, and so I know that

some instructors, including myself, feel that unless you are good at setting boundaries and can turn it off, it seems that you are constantly on as an online instructor,” Murphy says. “A lot of online instructors are experiencing this, especially with the change in the student population. [Students] have a more service-oriented mind-set. I find, especially

“When I would go in and talk about things like workload before the council of chairs, they would sit there and say, ‘What’s the difference?’ Now I have chairs demanding that we have an alternate workload schedule or plan for distance education.”

with adult learners, that they feel, ‘I paid money. I want my question answered, and I want it answered now. I want my feedback.’ I think that can play into [faculty] burnout, especially if they are not supported as it is.”

Solutions: Prepare students to learn online, assess their readiness

Instructor readiness

Impediments: Lack of faculty understanding of student-centered learning, keeping up with technology changes

Teaching online is still very new for many online instructors, and some find it difficult to adjust to the learner-centered pedagogy that effective online instruction demands. “They still rely on that lecture,” Murphy says. “They’re a

little nervous to let some of the control go to students. You will see beginning online instructors post so much and constantly answer every comment on the discussion board to the point that they’re exhausted by the end of the semester and never want to [teach online] again.”

The faculty in this survey also indicated that they need help keeping up with distance learning technologies and understanding effective ways to apply them to their courses.

Solutions: Online teaching symposium, peer support

TWU has an online teaching symposium during faculty development week that gives faculty members an opportunity to talk informally about teaching strategies, not just the nuts and bolts of the technology, with colleagues who also teach online, Oomen-Early says.

“Having that support is helpful, and not just social support but support in terms of the learning technology and trying to keep up with it.”

TWU also has some seed money available for faculty to conduct research on instructional technology and share ideas with their peers.

Reference

Schifter, C.C. (2002). Perception differences about participating in distance education. *Online Journal of Distance Learning Administration*, Vol. V, Number 1. Accessed Jan. 14, 2008 at www.westga.edu/~distance/objdla/spring51/schifter51.html.

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STRATEGIC PLANNING...

From Page 1

Commission and its Academic Quality Improvement Program (AQIP) have excellent criteria that include “Helping Students Learn,” “Valuing People,” “Understanding Students’ and Other Stakeholders’ Needs,” etc. The facilitator will use these meaningful criteria to guide faculty through brainstorming sessions to determine departmental goals along with an activity to prioritize them. Limit the number of goals to a realistic and accomplishable few (three to five per category).

Develop an appropriate format for the finished product.

The form should have several specific requirements beyond the list of goals, including:

- Specific *action steps* that will be taken to achieve each goal/objective
- *Ownership* of the action, objective, or goal (an overseer of the process)
- *Deadlines* for when the specific actions will be completed
- *Midterm assessments* to keep them on track
- *Costs* associated with the actions or perhaps the goals/objectives

Very important are the ownership, deadline, and associated costs. Without an owner, the process may wander, without deadlines there will be no hurry to complete it, and a project that costs too much is not valid without new or reallocated funds.

Hold the planning forum at an off-campus site.

In a single day, the department can, with the help of an experienced facilitator and without influence from the administration (including the chair who is an **equal participant** in the planning), put together a plan with short-, mid-, and long-range goals along with

associated action steps to ensure their success. In addition, holding it at a neutral site away from campus (and its inherent baggage) can help allay the fears of skeptical faculty.

The following elements should be discussed during the forum:

- Threats and opportunities to/for the department
- Long-range goals that address the threats and opportunities
- Mid-range goals that address the long-range goals
- Short-range goals that address the mid-range goals
- Action steps to address each of the three types of goals
- A priority order

During the planning forum, several things should be kept transparent:

- The mission and vision of the institution, college, and department
- The alignment of all of the above
- The environment and how the goals fit

Enter the data into the chosen format.

Once the planning forum is complete, collect and enter the data into the plan for distribution, review, and comment. During this cycle the participants might find mistakes or slight differences in perception, and this gives them another opportunity for input.

Schedule and hold a follow-up review.

Schedule a follow-up meeting to review the document. Insist that participants bring their suggestions for ownership, deadlines, and estimated cost. This step helps keep the process transparent.

Develop and publish an annual schedule for planning and assessment.

Developing, publishing, and keeping to a schedule for moving the process forward are absolutely critical to creating and maintaining the new culture

and for developing buy-in. It is this step that departments normally fail to complete.

I recommend a schedule that does not quite follow the academic year. Assess the outcomes in the spring and fall and then use the data (results) during the spring to adjust the plan for the following year. There will always be some overlap; however, at the beginning of each year, the faculty are all on the same strategic page. In addition, review the plan frequently.

Determine a method for aligning the plan with the departmental budget.

It is standard procedure for departments to grab new things as they come along (e.g., new degrees, new facilities, etc.), to the detriment of existing programs. There must be a way, within the plan, to ensure the ongoing support of quality programs and the deletion of archaic programs.

In summary, there are a number of other elements that can be used in creating this new environment, including a faculty leadership team, a staff council, and task forces to do the research and work. Departments can be brought into a continuous improvement mode; however, they must see the advantages to them and they need neutral guidance during the process.

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The Changing Nature of Meetings: Hybrid Teleconferencing in Higher Education

By Joan Thormann, PhD, and Isa Kaftal Zimmerman, EdD

Background and Rationale

We have observed that higher education faculty and administrators are often at different locations so that face-to-face meetings, until recently considered the norm, are becoming less common and more challenging. In the interests of cost-effectiveness and convenience, face-to-face meetings often include one or more telephone or video participants. As hybrid teleconferencing and videoconferencing become more widely accepted, remote participation in face-to-face meetings is increasing. By hybrid we mean that some participants meet face-to-face and some participate from remote locations using conferencing technology.

There are many examples that demonstrate the growing need for effectively run hybrid videoconferences and phone conferences. Many institutions of higher education have multiple campuses and expect and need both faculty and administrators to attend meetings because of common issues. In addition, many faculty can and do live anywhere from 30 to 3,000 miles away from the location of a campus meeting. A presentation or some other university business may cause an administrator or faculty member to be out of town when important meetings occur. Finally, people do fall ill or are not mobile and therefore benefit from participating in meetings through conferencing technology. Actually, everyone benefits!

If one looks at cell phone services currently offered, one sees that cell phones are so ubiquitous that it is no strain for any faculty member or administrator to engage in a meeting from a distance. One third of the world's population has a cell phone. In

addition, speakerphones and services such as Skype and AIM Phonenumber, both Internet-based communication systems, make such participation free and easy.

An investigation shows that many sales and business organizations have guidelines and tips about how to both conduct and participate in telephone and videoconferencing. Unfortunately, this information is not widely known in the higher education community. Because of our frustration with many meetings characterized by awkward participation and leadership, we are providing suggestions drawn from the existing literature and from our own experience in higher education.

Successful hybrid meetings

Successful hybrid meetings require all participants to take responsibility for moving the meeting in a productive direction. In this article we recommend guidelines for conveners and participants, both face-to-face and remote.

Guidelines for conveners

1. Explain the rules of engagement.

The rules are described below. Communicate the recommendations prior to and at the start of the meeting.

2. Develop, distribute, and keep to the agenda.

Ensure that the remote participant(s) as well as the face-to-face participants have an opportunity to contribute to developing the agenda—a rule that transcends remote meetings. This enhances people's participation because they have a stake in the content of the meeting. When the meeting strays from the agenda, the remote participant can lose track of the direction of the meeting, feel less able to contribute, and become quite frustrated.

If the meeting does stray, the convener needs to be explicit about which topic has become the focus of the discussion.

3. Make sure only one person is speaking at a time.

Have each speaker identify him/herself as s/he speaks until it is clear that the voices are recognizable to the remote participant. Typically, after two or three comments, a person's voice is recognizable.

4. Ensure that every member is called upon to speak to the agenda.

Ask each person to speak to specific agenda items by "going around the room."

This allows everyone to have a voice in the discussion, including the person on the phone.

5. Acknowledge all remote comments.

The convener or another participant should acknowledge all remote comments in a substantive way. This is a substitute for eye contact and body language.

6. Include the remote participant regularly.

Ask the remote participant to contribute to a specific topic, for example, "Do you have anything to add to our discussion about the syllabus?" as opposed to the general question, "Are you still there?"

7. Keep the remote participant engaged.

Ask the person to take notes. This encourages appropriate questions/comments in order to produce clear and accurate notes of the meeting. The note-taking should be assigned in

MEETINGS...

From Page 7

such a way that the person does not feel that the task is a “punishment.”

8. Test the equipment prior to the meeting.

If necessary, upgrade the equipment. It is still a better option than having individuals travel great distances or not including necessary contributors/important stakeholders.

9. Make sure that the environment is conducive to good conversation.

That means everyone needs to speak loudly enough so the equipment can pick up all comments and transmit them clearly. That might also mean that people or the equipment needs to move.

Guidelines for remote participants

1. Ask how to be recognized as a speaker.

The normal cues of eye contact and body language as well as pauses in the conversation are not available to the remote participant. Thus when the remote speaker wants to comment, an agreement needs to exist about how to interrupt the flow of the conversation without being rude.

2. Ask that expertise be recognized.

If the remote participant has a particular expertise in or contribution to a particular item on the agenda, the person should ask to be recognized at the right moment on the agenda if the convener has not done so.

3. Stay focused.

Even if the remote participant is not asked to take notes, s/he should do so to stay focused. In addition, the remote participant should not multitask. It may be tempting, during a phone confer-

ence, to attend to other activities, but it is counterproductive to the progress of the meeting.

4. Provide feedback to the convener.

If the meeting has not been satisfactory, the remote participant should contact the convener to request changes for the next meeting. This may include changes in procedures or equipment, or whatever is appropriate. *(This article might be a useful tool for effective change!)*

Guidelines for face-to-face meeting participants

1. Remember that body language is not available.

Be constantly aware that the remote participant cannot read body language, see facial expressions, or hear pauses, so the discussions need to be clearly articulated.

2. Follow the rules of engagement

Help the convener and other participants to follow the rules. If you notice that the remote participant is not being included, offer to be an advocate for that person to make sure that s/he is consistently included in the conversation.

3. Treat the remote participant as if s/he were face-to-face.

Listen and respond to the remote participant as if the person were present in the room. Being vigilant in acknowledging the remote participant will result in a more useful meeting and make the remote participant feel included.

Conclusion

The old aphorism “Practice makes perfect” applies in the case of hybrid conferencing. Sometimes when you try an approach for the first time, it may be uncomfortable or even ineffective. However, working through the challenges is worth the effort, and the next

time you try the approach you will notice an improvement. Everyone who is “present” both contributes and benefits.

In a world where a single device such as the Apple iPhone can provide video, music, phone, email, and Web capability anywhere, the work of the future will not be confined to place and face-to-face.

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