

*An Analysis of
Summarising and
Archiving within
Talking Heads*

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Introduction

This paper is intended as a brief overview of how summaries have been created and developed so far in the online communities within Talking Heads, and to look at how they could be used in the future. The body of research into online communities and learning is developing at a pace, such as Bradshaw et al (2002), Gee (2002) and Russell et al(2002). Research into the potential for summaries to be effectively used within and external to these communities will complement this work by helping to understand how to better manage information and knowledge created by those communities and develop an understanding of what constitutes successful online learning communities.

The information used for the basis of this report has been gathered through formal and informal discussions with online facilitators and managers of Talking Heads, and also through the process of writing summaries, and working collaboratively with facilitators. Many facilitators have suggested that summarising conversations held in Talking Heads is useful. In theory, summarising is a good idea; members of the communities could potentially find things easier, share shorter documents, eliminating the need to trawl through long debates and read repetitive comments. Logic suggests that knowledge, once being created should be archived, so that it can be easily retrieved by participants and accessed by others who may have an interest in what goes on within the community. However, in practise the process of summarising and archiving raises difficult yet important questions regarding issues of audience, purpose, confidentiality, and the negotiating of meaning.

Given a brief literature search, there appears to be little research specifically focused on creating and using summaries in online communities. Wenger's work on Communities of Practice has been helpful in developing the way that summarising has been approached in Talking Heads. There is however a tension between that of summarising and the unavoidable reification that the process involves. Communities of Practice are continually negotiating meaning, whereas summaries pull us towards a less dynamic and more fixed view of knowledge. White (2000) has written about how best to use summarising in online conferences as part of a facilitator's repertoire. She observes that summaries need not be in text to achieve their purpose, and uses visual and metaphorical representations. Her findings also suggest the summarising role is often filled by the facilitator which can be difficult to achieve on top of all the other duties. Brown and Duguid(1998) have written of 'organisational translators' who 'frame the interests of one community in terms of another community's perspective'. Arguably, this is the role a summariser fulfills in Talking Heads when writing summaries of conversations for audiences outside the community, and they highlight the complexity of this role, especially the need to be aware of bias. Stephen Denning, in his writings on Knowledge Management talks of using 'story' to encourage sharing of knowledge, which has potential to be transferred to online communities.

Clarification of the issues involved when summarising conversations within Talking Heads will assist in developing a formalised procedure, and could provide the opportunity for the full potential of summaries to be realised. This paper sets out to posit a model of summarising that can be applied to online communities as well as

reviewing the styles and formats used so far by different facilitators. This discussion outlines for whom the facilitators wrote the summaries, and for what purpose, with supporting examples. Issues arising will then be discussed and recommendations made.

Definition

To summarise is to encapsulate the main points of a document or discussion, reducing its size. In order to do this, a summariser must perform functions such as generalisation and aggregation (Endres-Niggemeyer 1993). In Talking Heads, some summaries have attempted to record, not only the shared insights that may be drawn out, but also to represent the 'flavour' of the conversation and how the members of the community related to each other; whether the participants were enthusiastic, whether the discussion moved quickly or slowly, and to encapsulate the tone of the speakers, whether humorous, angry, anxious or enthusiastic. The summarizing process has not always been considered to be solely about gathering information but about representing the activity within a community. Therefore, previously accepted ideas of what constitutes a summary may not always be appropriate for these online communities.

The use of the word 'summary' also needs to be addressed. Even if the conversation is filed in its entirety with only identifying names removed, it has been referred to as a summary. At other times, perhaps simply because the resulting document is shorter than the original conversation, any account of a discussion within Talking Heads is currently referred to as a 'summary'. This term has potential to be misleading and confuse the purpose of the document. For example, the DfES may request a report outlining a hotseat discussion with a view to gauging heads' opinions. This may need to be approached in a different way than if the outline was written for use within the community in which the hotseat was held. At present all such requests are referred to as summaries. Whereas a summary is intended merely as a representative outline, a report aims also to inform and make conclusions, such as why a conversation was not successful. It may also require the use of another style, having need of a different structure, or more formal language. It may affect the choice and use of quotations from the original conversation, depending on the audience for whom it is intended.

The Genre of Summarising: Summary Styles in Talking Heads

There have been a variety of approaches to summarising and archiving developed by the Talking Heads team. The following is an outline of the four styles of summaries written so far.

1. Transcript

Some facilitators have chosen to lightly edit a transcript of a conversation, anonymised by removing names. Sometimes bold text is used to highlight sections judged by the summariser to be of importance. It is not strictly a summary and would be more accurately described as an anonymised transcript.

2. The Case Study

This style of summary is lengthy and detailed. Examples of questions are quoted and answers reproduced, with details removed that could identify the contributor. Because it has not been précis-ed, it illustrates clearly the negotiation of meaning between the participants. The debate is shown almost verbatim. The example is neither clearly the reportage to stakeholders nor an enquiry report. It would perhaps be useful to members of the community in which the original conversation was held which would nullify the need to make the contributions anonymous.

3. The Newspaper Report

This summary is similar in style to journalistic reportage. It is mainly used for summarizing hotseats and is characterized by a list of questions raised by participants, and then a selection of answers given. It could perhaps be useful to both policy makers, and the guest who took part in the hotseat who may be interested in the numbers who took part and in the content. Some headteachers might be interested in reading the report as they might a newspaper article.

4. The Academic Article

This style is mainly used for hotseats also, where an activity deliberately established to identify and codify knowledge of practice. The summary lists in bullet points for easy reading a collaborative list of practitioner advice offered by headteachers. Sometimes this style attempts to represent the 'mood' of the conversation, with the use of words such as 'buzzing'. The genre of this is similar to case study research and evaluative descriptive report writing.

Audience and Purposes

This section is in two parts. Firstly, the potential audience of the summaries is identified, then follows an outline of the purposes for which summaries are written at the present time, and how they could be used in the future.

Potential audience

There appear to be many potential audiences for summaries in Talking Heads, and these can be separated into the following three categories, as discussed below:

- Participants: community members who read and/or make contributions
- Wider Talking Heads community
- DFES/NCSL

1. Participants

Those who are participating in the conversations within the communities, are interested in summarising as a record of online discussions, for three reasons:

- A précis adds symbolic value to the discussion.
- It can also consolidate learning by providing the opportunity for contributors to read a more ordered representation of the issues discussed.
- A summary could also function as a kind of electronic memory to be retrieved when needed.

2. Wider Talking Heads Community

Summaries provide access to discussions and knowledge that has taken place in the past.

No comprehensive data exists as to whether participants are using summaries in these ways. There is, however, some qualitative evidence from 'stickies' that summaries are read and found to be useful by some community members, but the data is not available to assess the value. It could be argued that there is perhaps considerable symbolic value in archiving summaries to add value to the debate.

3. DFES/NCSL

Both of these organisations would appear to see summaries as important for five reasons:

- Firstly, as part of policy development and implementation it could be useful to the DfES to have access to headteachers' views and opinions.
- Secondly, both have expressed interest in summaries as evaluative measures of the value of the online community discussions.
- Thirdly, both establishments would like to increase the membership of Talking Heads, and summaries could possibly provide a useful means of advertising the value of online community activity.
- Fourthly, the NCSL wishes to establish itself as a world player in the field of education leadership and management. Summarised conversations would be attractive to this wider audience.
- Fifthly, the belief that distributed around schools is all of the best practice needed and this should be collected, codified, and made sharable and accessible.

An Analysis of Purposes:

In reference to online conferencing, White (2000) suggests that before the process of summarising begins, there needs to be careful consideration of the purpose for which the summary is being created, considering the following four questions:

- Who will use the summaries?
- How will they use them?
- What is the desired action outcome?
- Where will they be located?

The following outlines the answers to these questions for current intended purposes of summaries within Talking Heads.

I. Adding Symbolic Value

Who: Members of community

How: Read after conversation finishes. Requires tight time frame

Desired outcome: Sense of ownership of community and of activity

Where: Community archive

2. Consolidate learning during conversation

Who: Members of community

How: At intervals judged by facilitator, post summary of what has been said so far

Desired outcome: To check understanding so far and move conversation on. Could potentially give conversation more validity as it gives the opportunity for contributors to rephrase their words if they can see they have been misunderstood

Where: In conversation

3. Consolidate learning after conversation

Who: Members of community

How: Read after conversation finishes. Requires tight time frame

Desired outcome: Bring clarity/sense of closure-much the same as what is done at face to face meetings or even the use of plenary in teaching

Where: Community archive

4. To stimulate the development of new activities /discussion

Who: Community members

How: As a reminder/indication of past conversations and to pick up on key ideas or topics that were identified and to follow them through

Desired outcome: Stimulate new ideas, may encourage lobbying for change

Where: Community archive/introduction for new conversation

5. Archiving practical knowledge

Who: Members of community

How: Retrieve information

Desired outcome: Support in practice

Where: Community archive

6. Evaluation of online activity

Who: Facilitators, DfES and NCSL

How: Facilitators for research into community activity, DfES and NCSL for reportage

Desired outcome: Leading to improvement in how conversations are set up and managed

Where: In community archives and websites as above

The following outlines further potential for summaries:

The following four examples are possible ways in which summaries could be used within Talking Heads:

1. Promotion of Online activity outside the community

Who: Users of DfES/NCSL websites/magazines

How: An opportunity to see how and what other practitioners think/do

Desired action: Readers will be encouraged to join Talking Heads

Where: Located on those websites

2. Promotion of online activity within the community

Who: Members of the community

How: As a preview

Desired action: they can decide whether it contains the information they need and can open the original conversation to find more detail -this would mean the summary would not need to be as detailed as those designed to capture knowledge

Where: In an easily accessible archive

3. Highlighting action points

Who: Members of the community

How: To clarify the agreed action outcomes, such as developing the community's activities

Desired Outcome: Community members will follow common direction

Where: At end of conversation and eventually in archive

4. Capturing learning to share with a wider audience

Who: NCSL website/magazine, for NPQH course

How: Gain practitioner knowledge

Desired Outcome: other heads/teachers will benefit from information such as how to manage workload. Chosen with care-pitfalls here (see issues arising)

Where: Community archive, NCSL website and magazine

Issues Arising:

Arising from the above description of summarising within Talking Heads, are the following matters for consideration, which can be divided into four specific areas: the role of a summariser, sharing the discussion summaries with a wider audience, capturing knowledge, and archiving.

I. Role of Summariser

The process of summarising involves by its nature interpretation. This creates the possibility of misinterpretation and bias. A summariser has to translate the original document or conversation into a different shorter form and at times for a different audience. Brown and Duguid (1998) speak of the role of a translator as a powerful and complex one requiring trust and the ability to bring clarity. They assert that an external consultant can be more effective in this role, being less inclined to bias. Bias cannot be avoided but someone who is slightly removed can possibly avoid it more than someone who is deeply involved in the day to day running of the online community. However, at the same time, a summariser within Talking Heads would require an understanding of what makes the communities thrive such as the feeling of comradeship and support, and ideally an appreciation of the issues involved in working within education. A summary devoid of any of the sense of the way the contributors related to each other may not hold as much interest for members of that community. One facilitator warns of a vibrant conversation sounding flat when summarized for an audience such as NCSL website. On the other hand, members of a community may wish to merely see a representation of some insights or advice briefly presented. The summariser should be aware of the needs of his or her audience.

2. Sharing the content of discussions with a wider audience

So far, summaries in Talking Heads can only be accessed by those who belong to the community in which the original discussion was held. It would affect the nature of the communities if members lose the assurance that their contributions will be

shared outside of their own community. It is not simply a matter of taking the discussions from a community and publishing them in other areas. The culture and expectations of the people involved in the communities must be considered. Confidentiality is understandably a huge issue, as at times sensitive issues are discussed and the freedom to speak without fear of repercussion is a vital principle in a community where reducing isolation and gaining support is paramount and a frequently cited reason for belonging to Talking Heads. Seeking permission at the outset of a conversation is also problematic, as this may change the nature of the conversation. Telling contributors their words may be used could restrict freedom of expression. Asking permission to share afterwards may not be straightforward either as it can be difficult and time consuming to trace all contributors. Wenger (1999) conceptualises this process as negotiating the boundary of the community.

This is not to say that that a wider audience is never appropriate. Some members of Talking Heads have shown willingness to share insights from their communities, such as the recent conversation set up in the PBM community where several members have been in favour of allowing their story to be shared outside of the community. This is under conditions such as confidentiality, and a chance for the participants to have input into the final product. There is potential for sharing these stories or knowledge with others, but it appears there is an expectation that this must involve the knowledge and permission of the members of that community. The procedure for how best to approach these issues is a topic for further research and discussion.

3. Capturing knowledge

Definition and Use of 'Learning'

One argument for writing summaries is to formalise/consolidate learning. The idea is that by taking away all the unnecessary chat or repetitiveness, it will make it easier to draw insights from the conversations. It could mean that something mentioned briefly in amongst many other points is given proportionate weighting, and avoids being overlooked if picked up in summary. Acting as a kind of plenary to a lesson, a summary is spoken of as having highlighted 'shared learning'. NSCL have a series of visually represented summaries of hotseats available on their website, referred to as 'extracted learning', and some summaries in Talking Heads include 'shared learning' in subtitles. The use and definition of the word 'learning' is important here.

Learning can be described as an internal process, and is different for everyone. From the same conversation can come diverse opinions and impressions. It is not a simple process to capture learning and knowledge. Many have written of the complexity of the learning and assessment process, such as Desforge(2000), who writes of the 'almost unbelievable complexity of learning and development'. Learning institutions are in a continual debate about how best to assess the learning of its students, and all methods used could be described as blunt instruments. Desforge speaks of the 'potent and enduring misconceptions which learners bring to any setting', and this combined with the unavoidable subjectivity of the summariser as discussed above,

highlights the difficulty involved with interpreting and representing the learning in a conversation. Therefore claiming to have represented the learning in a summary is a simplistic standpoint and potentially misleading.

It may be more suitable and helpful to refer to the information contained in a summary as knowledge, common insights, ideas and recommended resources shared during the conversations. Just as referring to every shortened document or commentary as a summary can lead to misunderstanding, the idea of referring to summarizing the 'learning' in a conversation is problematic.

Dynamic Knowledge versus Static Knowledge

When dynamic knowledge in discussions is 'captured' by the process of summarising and archiving, it becomes static. Wenger (1998) describes the process of negotiating meaning as part of the process of a Community of Practice. He argues that in attempting to capture something dynamic such as knowledge, there is a risk of 'holding back' the advancement of community activity through the process of negotiating meaning. It is arguable within an online community such as Talking Heads, that creating static knowledge could suppress activity. An archive may encourage a head to search for information rather than to raise the matter in an online conversation. The process of sharing knowledge is why a Community of Practice exists. One facilitator's view within Talking Heads is that summarising can discourage participants to stop the exchange, because a 'summing up' can give the impression that the conversation is drawing to a close. Whereas, it is in the conversation that a community exists, and there is theoretically no end to this ongoing process of negotiating meaning. Care must be taken to avoid using summaries in this way. Unless used again to become dynamic such as stimulating further discussion. A way to avoid this would be to use the static knowledge as a stimulant to further discussion, as described above.

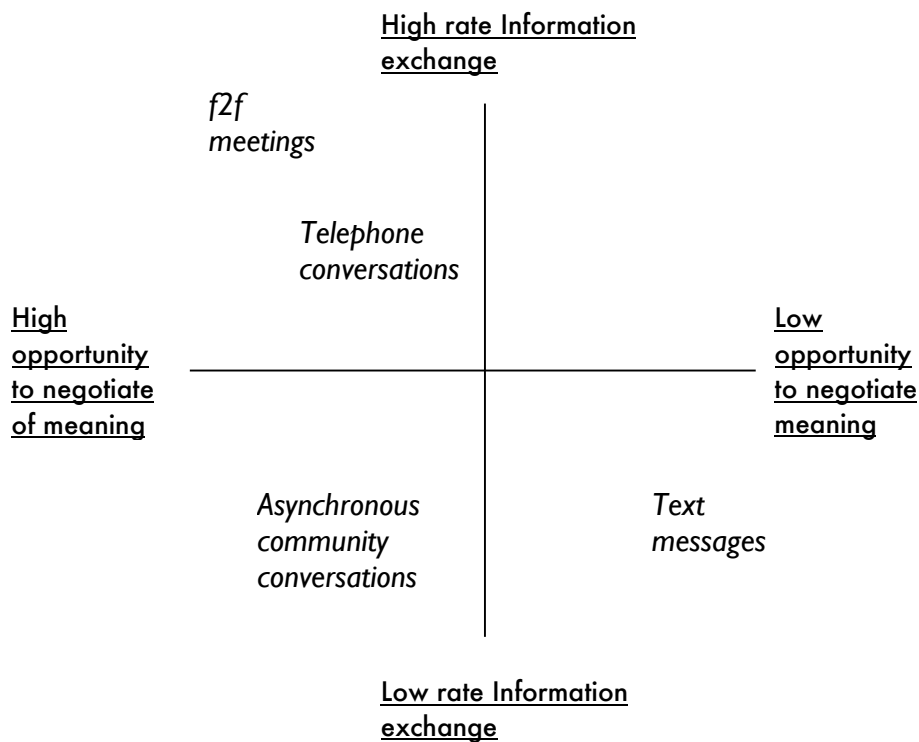
Communication Opportunity

The rationale behind summarising is supported by good practice in face to face settings. For example, a common characteristic of a good lesson is some form of summary, be that by a teacher, students or some other means. The aim of this being to pull together and share strands of information and knowledge and enhance the learning experience of the participants. A key advantage that this provides is a better opportunity to move forward at a later date because of the more widely shared understanding that is developed. Well run meetings commonly have ongoing summaries, that is agreements of action points and commonly understood, though not always agreed, positions arrived at through dialogue and discussion. Conversations between individuals, formal or informal, are commonly negotiations

of meaning and central to this negotiation is an ongoing summary of points of view exchanged between the discussants.

There are key differences between modes of communications when it comes to both the ability to negotiate meaning and the potential rate at which information can be exchanged. For example, in a distributed asynchronous online conversation body language is not present and these visual clues transmit a large amount of peripheral but important information. The act of contributing to asynchronous communications encourages reflective and less frequent inputs than might be the case in a face to face conversation. It could be argued that the degree of thought and care that needs to be put into each act of communication is far greater than that of f2f conversations with their high rate of information exchange and consequent opportunity for clarification and qualification in the process of negotiating meaning.

Modes of communication – richness and negotiation:



So what is the implication of all this for summaries of online asynchronous conversations? Firstly the summative summary of a conversation is called into question as a valid representation of the meaning of that conversation, be it undertaken by an independent ‘negotiator’ or a participant in the conversation. As stated elsewhere, all summaries are by their nature subjective and interpretative but in more traditional settings they are at least, commonly, supported by a process of formative summary where those engaged in the conversation have the opportunity to challenge individuals’ interpretations. Secondly, a structured approach to conversations with ongoing formative summaries, that is active facilitation by an individual or the conversation participants may increase the opportunity for negotiation of meaning. Thirdly, participants need to be aware that the objectives of the conversation are to produce a summary and given the opportunity to challenge the summary so that their position or viewpoint is not lost.

4. Archiving

The possibility of creating a central archive or cybrary has been discussed since the launch of Talking Heads. The biggest obstacle to this is the think software which does not have adequate functions to set up a large cybrary with an effective search facility.

Many of the arguments for and against summaries are also applicable to the issue of a cybrary, such as who will be able to access the content of a cybrary and why. It would breach community confidentiality if all Talking Heads members could look into archived conversations or summaries from all communities. Addressing the ethics of sharing the content of online communities and formalizing where Talking Heads stands could clarify these issues and perhaps make some decisions easier.

There are three subtopics addressed in this report: What is currently archived in Talking Heads and how, archiving for evaluative purposes, and archiving for knowledge capture and retrieval.

Current archive use

At the present time in Talking Heads, archiving has been managed separately within each different community where selected conversations are filed, able to be accessed only through visiting that community. The most prominent archives seem to be those created for the hotseat summaries as these are the activities set up for the purpose of discussing practitioner knowledge with outside 'experts'. Their content is judged important to re-visit. More research is needed to clarify these archives are accessed. Software restraints make it difficult to continue the debate once a hotseat is finished and archived. One way members have approached this, is to leave stickies on the summary page.

The Virtual Heads community in particular has many examples of students on the NPQH course continuing the debate through the sticky tool. The summaries archived here serve to further the discussion of issues with which students need to be familiar and stops them having to trawl through the whole hotseat. They are easily found in the hotseat archive, published on the front page of the VH community. In the other communities it is harder to gauge whether people are reading the summaries, and this warrants further research.

The idea of a hotseat summary is certainly seductive, as evidenced by a recent questionnaire set up in the Small Schools Community. A hotseat and its summary were published in this community, and a conversation set up in which to discuss with heads if they found the summary useful. Eight heads replied, all agreeing they would rather read a summary than the entire hotseat. It was not clear however, whether or not these respondents had actually accessed summaries of conversations in Talking Heads before this conversation was held. More research into their use could clarify whether or not the hotseat summaries are being utilized.

Archiving for evaluative purposes

There are other reasons discussed for keeping archives of summarised conversations, such as keeping a record of community activity for the purposes of research, should anyone wish to search for information or study the development of Talking Heads in the future. This is not as simple as it sounds. Summarising by its nature requires interpretation and it would be more accurate to work from raw data. It could be useful to archive conversations in their original form for this purpose.

Archiving for knowledge capture and retrieval

An archive intended for members of Talking Heads, could mean that people would search for past conversations to access knowledge. This raises the question of the kind of knowledge that is being archived. There are already existing text sources for which teachers can search for knowledge, such as Croner, DfES, Journals, and other associations. There are also existing peer networks, mentors, and LEAs where practitioner knowledge can be shared. If Talking Heads attempted to supply a similar service, it would need to be considered whether or not the knowledge it archived was unique. What may be unique in Talking Heads is the practitioner knowledge shared in a community where there is sufficient trust and rapport to be forthright and open.

However, for Talking Heads to become a resource for static, as opposed to dynamic knowledge arguably has the potential to change the emphasis of the communities. If a headteacher needed to find information regarding policy for example, it could be easier to search the DfES website, where there is comprehensive and continually updated access to policy documents, case studies and advice for teachers. It is arguable that using resources to supply a similar service in Talking Heads could significantly change the nature of the Talking Heads project, which could be described as establishing and encouraging communication between professionals. It may result in diluting the community activity by drawing people away. The following are quotations from a headteacher describing the benefits of Talking Heads during a recent hotseat:

- It is...a useful tool for sharing ideas
- There are opportunities for gathering useful information on the site, for example advice on policy writing
- An opportunity to directly ask questions of people who are key decision makers in the education world. Where else can you do this?
- If the majority of heads used this facility, it would be the most rapid response system possible for communicating opinions on current issues. It would be a point of reference for decision makers to check out opinion - a quicker method of communicating views that through, for example an union
- A valuable characteristic of the facility is the ability to find out how things are organised in other LEAs
- It can also be a tonic to read the concerns of others - it does make you feel that you are not on your own!

The head mentions 'gathering useful information', referring to a hotseat held in September 2001, whereby participants shared ideas about how to write a racial equality hotseat. The hotseat guest supplied examples of policies that had already been written as a starter for discussion, and supplied some links to other websites who already had supplied much information. The benefit of accessing the archived hotseat over visiting these sites could be reading the interchange of ideas and frank 'opinion' and the 'tonic' of recognising common frustrations and experiences. This cannot replace participating in the conversation, but may provide a useful resource for community members if the software could be developed to provide a more effective way of continuing a debate once archived, and for an effective search facility.

Another important factor involved with archiving for knowledge retrieval is what Rosenfeld and Morville (2002) dub the 'too-simple information model'. The way in which we gather information is not simple, and they describe the common mistaken belief that a kind of 'black magic' assists people to miraculously recover whatever information they require. In reality we follow a messy, iterative course, continually modifying our requests (Rosenfeld et al 2002). In order to have an effective archive, good design would be needed, with a clear vision of what kind of information the archive will index and how it will be used.

Recommendations

Summarising:

Summarising community conversations has potential for expanding and developing online communities. Wherever possible participants should be involved in this process, and the way in which the summary is used should be in keeping with the philosophy of successful inline community to which Talking Heads subscribes, such as confidentiality, participation and belonging (Chapman et el 2002).

Practical Advice for Writing Summaries

1. Identify purpose and audience-does this summary need to be written?
2. Title

The titles of a conversation summary may not always reflect the content of the discussion. Sometimes when a hotseat is set up to discuss a particular topic, the emphasis changes through the course of the discussion. In that case, the original title would need to be retained so that conversation participants retain ownership and can easily find the summary, as well as a new title to reflect more accurately the content of the summary.

3. Seek permission from participants before sharing content of discussion outside of a community
4. Enable participants to check and give right of reply
5. Select genre of summary suited to audience and purpose
6. Only include statistics if appropriate or useful in supporting the intended purpose of the summary. Possible information to include, depending on purpose, could be: number of participants, scale of conversation, time and date it was held

Archiving:

- Each community should maintain its own archive using the index tool in Talk to Learn
- This archive should reside in the community from which it is drawn
- Only members of that community should have access to the archive
- The archive should be easily accessed from the front page of the community
- Facilitators should check regularly to see if stickies have been left on articles in the archive and acknowledge the contribution either personally or within community to restart debate if considered appropriate.

Because of the difficulty of sharing a conversation outside of the community in which it was originally held, a central archive within Talking Heads has been suggested as a way in which insights could be shared with a wider audience. Research is required into how this could affect the nature of the online community, such as:

- Where the archive would reside-who has access
- Structure of the archive including indexing
- Clarification of ethics
- Impact on community dialogue - how to stop it diluting contributions stultifying community dialogue

A trial central archive could be achieved on the main page of Community of Talking Heads, in the style of archives already set up in communities. This should have a short time frame, such as three months, with regular monitoring and an evaluation to assess some of the research questions identified above.

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