

Tender to WMUK for a series of “Training the Trainers” (TtT) events, to be run by Charles Matthews. Submitted by email to Jon Davies on April XX.

**This document is divided into six parts. The response to the offer to tender is Part E.**

**The document begins with a short summary of the thinking. The rationale is written out in detail in parts A to D.**

**Part A: Statement of premises**

**Part B: Tabulation of issues with Moodle and developing an Open University-like model of distance learning**

**Part C: Detailed workshop proposal**

**Part D: Personal statement**

**Part E: Response to offer to tender**

## Summary

This response to Wikimedia UK's offer to tender for Training the Trainers (TtT) became a lengthy document. This was not the original intention, but a response to the clear requirement to formulate an adequate framework, in which to look at the training needs in the large. The response as such is in Part E.

What is envisaged is the application of two concepts from distance learning: blended learning and a Course Management System (to be specific, the Moodle free-source system). "Blended learning" implies that face-to-face tutoring should be thought of in context: trainees, in an ideal world, would have plenty of chance to study online before and after TtT sessions. Participation in actual training events should also be part of the picture. The use of a Course Management System is an answer to scaling up and professionalising the online part of the scheme. In the context of (let us say) 500 active Wikipedians in the UK, of whom about 20% are currently reached by WMUK events, attention to the distance learning aspect seems necessary. Much is made below of the model provided by the Open University and their OpenLearn courses, as an indication only though of where the approach suggested might lead.

Thinking in terms of Moodle is a direction rather oblique to that prevailing in WMF circles (the "wiki way", for purposes of argument). Some discussion is given to point up the implications.

All that said, the material in Part B can be disregarded if it is not found relevant. What is given in Part E is the tender for one-day workshops run by me at £xxx, for six trainees, with caveats explained there.

## **Part A: Premises**

### **Training premise**

WMUK's requirement is for a strong and consistent brand in its training events. Such events, however, will need to suit varied audiences and occasions, and will not conform to any single template or model. The well-trained trainer will be able to approach any training or outreach opportunity with a view to putting together a flexible outline, communicate it to colleagues, and deliver it in a confident and engaging way, usually as part of a team effort. Such events will draw on a bank of experience and good practice, and use some standard techniques, while responding to the particular audience.

The strategic aim is to have a training style that is a common denominator across the WMUK community, while at the same time avoiding dogmatic views on how to teach within it.

### **Distance learning premise**

The approach taken in this document is that WMUK needs to involve as trainers, and indeed as activists, many of whom are not in easy reach of UK Wikimedia events, or for whatever reasons would prefer to operate from their computers, to a large extent. Therefore the training programme as a whole should be largely compatible with online distance learning. Rather than reinvent the wheel, the premise is that the model used by the Open University, in particular in its OpenLearn project, is a good place to start a discussion: it is fully-fledged, successful, and has international recognition and grant support. In the jargon, "blended learning" is particularly appropriate to WMUK's needs.

What is written in the next section explains the implication of this approach by contrasting an "OU-lite" approach, which could be implemented by WMUK shortly, with where this might lead. The assumption is that course materials and tests should be hosted in Moodle, a free-source software system that is widely adopted in academia. (Wikipedia has basic details of Moodle, OpenLearn, and "Open educational resources".)

### **Premise on consistency with the "wiki way"**

An initiative is required to move ahead with delivery of a full training programme. It is not yet common ground that the trainer-trainee relationship requires software support that goes beyond the Wikimedia repertoire. Peer-to-peer is largely unquestioned. E.g. Wikiversity is for authors of teaching material, not for teaching as such.

Flat hierarchy has to be consistent with parts of a workshop being led by individual trainers. A session has to be configurable, on cues picked up from the audience. A team of trainers has to deliver a workshop, by assigning activities. All these points are in tension with the onsite model familiar from Wikipedia and the other WMF projects. Trainers need to appreciate the implications, which should emerge in part from practical exercises. I would try to make them more explicit, as an aspect of TtT.

**Part B: Tabulation of issues with Moodle and developing an Open University-like model of distance learning**

This table relates to the detailed discussion of the distance-learning premise in Part A.

	OU-lite, i.e. could do now.	OU-like, i.e. aspirational
Teaching	Workshop-based	Full range of distance learning supported, from diagnostic and entry-level test. Workshops with tutors are the icing on the cake. Materials available that are directly targeted at, and calibrated to, the educational sector.
Delivery of materials	Web materials and tests available for asynchronous learning.	Multimedia delivery.
Assessment	Accreditation via workshops.	Fully-fledged credits system designed to meet training objectives of WMUK.
Licensing	Materials CC-by-SA.	Participation in “Open educational resources” movement (OER) by compliance with key points.
Presentation	Course Management System, namely Moodle.	Full Virtual Learning Environment.
Hosting	CMS hosted by a Moodle Partner.	WMUK hosts in-house, and is able to support other chapters’ needs.
Usage of Moodle	Off-the-shelf modules.	WMUK is able to use volunteer support for its own PHP development of modules.
Technical support for Moodle	Moodle community at moodle.org.	Professional design in use.
Manpower	Single contractor.	OU has a three-layer cake to assure quality: course teams producing materials with peer review; trained staff working on delivery; management assessment of impact by sampling.
Finance	WMUK budget	Grant-funded by supporters of the OER movement, e.g. the William and Flora Hewlett Foundation.

## **Part C: Workshop proposal**

### **Number of participants**

The following outlines assume TtT can be run in groups of six trainees, with a single tutor, in suitable spaces.

### **Allocation of time at proposed training course events**

TtT events should be roughly 40% theory, 40% practical exercises, and 20% driven by what the participants bring up on the day.

### **Theory**

There are a number of major headings:

\*Scale and segmentation: WP itself is too big a topic to cover in one day's training, so how do we divide it up, and teach it piecemeal?

\*Presentation: Presentation software itself has only a minor if definite role (short items requiring precise delivery). Projector style, and writing things up somewhere to provide fixed points in the swirl of discussion! There are important lessons available implicitly to the audience from how Wikipedians themselves navigate and search WP, and these should be factored into the planned presentation. Audience participation: make them.

\*Core and non-core: If the aim is to get participants editing quickly, what is the bare minimum to cover first? Matters arising.

\*Teaching modes: Workshops use a mixture of one-to-one, one-to-many and many-to-many styles of communication. Wikimedians will probably come into a TtT event knowing fairly much how to coach one-to-one. Main points here are that one-to-many (workshop leading) is a teaching technique, and successful teaching depends on numerous smaller points; on the other hand in the many-to-many situation the trainer is moderating, and good moderation really is one big thing (structured discussion reaches the parts unstructured cannot).

\*Style: Almost any teaching technique has both strengths and drawbacks. Use of humour should be both personal and unstrained (and, like sherry, is usually better when dry). No one has to shelve their own personality to be a trainer. Interact with your colleagues.

\*Preparation: The common pitfalls (preparing twice as much as will fit into the time, overestimating the baseline level of the audience, prosiness). Good preparation is concentration on a few key parts of the delivered workshop, not uniform: leave something to the day, and slickness should be a hidden quality. Handouts discussion, mailings.

\*Time management: Look at your watch! "Kill the darlings" to keep on schedule. Ending on time is basic politeness.

To get (say) 15 minutes or 20 minutes each. These topics would be broken up into two parts, to avoid stodginess.

## **Practice**

Two main types of exercise:

### **(1) Think on Your Feet**

Participants in turn respond to questions typical of what an audience might bring up. The focus is on different styles of answer, from succinct to “let’s look this up” to deflection and deferral. Trainers should know how to use “that’s an old debate”, “the short answer is”, “my personal view on this one is”, “what do others think?” etc. and other standbys.

### **(2) The Brief**

Participants in groups of three draft outlines of events to a previously-unseen brief. Detailed ideas and allocation of roles will be required: exercise time 30 minutes. Evaluation will concentrate on: realism of timings, good customisation, illustration.

Other practical techniques: short (only) role play segments; topical discussions with tendentious issues. These would be directed towards defining the type of professionalism required of trainers.

## **Write-up and feedback**

Exercise (1) will produce a list of queries (“FAQ pack”) that will build up and be banked for further sessions. Exercise (2) will be written up afterwards in an anonymised case-study format, comparing the ideas of the teams. Feedback on individual participants should be driven by WMUK’s needs, but I have put my thinking in Part E.2.

## **Trainees leave with?**

My feeling is that participants wouldn’t need papers to take away from the TtT events, but I could be persuaded otherwise. I’d envisage posting some highlights in the form of webpages that were subpages on the UK wiki, as a starting point. In line with the general points made in Parts A and B, I’d argue that the added value available from integrating introductory, course and post-course materials would be substantial, in the longer run.

## Part D: Personal statement

My background:

- \* University lecturer and college teaching officer, University of Cambridge, and lecturer at Harvard University;
- \* Seminar presentations and organization, conference speaker and invited lecturer;
- \* Small group teaching and wide experience of coaching (primary school children, students, adult learners, coaching in Africa);
- \* Wiki editor since 2002, Wikipedia editor since 2003;
- \* Published author on Wikipedia, co-authored “How Wikipedia Works”, 2009 (HWW).
- \* Participant in WMUK training and GLAM events;
- \* Local Wikimedia activist in Cambridge.

I have been writing freely-licensed online content now for very nearly a decade, and this has been my main activity in that time.

I see the WMUK community as full of potential as trainers: the basic enthusiasm and knowledge are there. Unlike many university lecturers, I did go on a course on teaching techniques. A cadre of WMUK trainers is a perfectly reasonable objective, and the main point is to distill from experience some basic lessons, adding in just a bit of self-conscious use of teaching techniques to make the most of it. People are already motivated and well-informed about Wikimedia topics, and the point is to add some know-how, fluency and confidence, rather than subtract anything or cover topics in layers of jargon.

I don't see a single “manual” as a required or desirable end-product, but the accumulation of knowledge within the system. So that begs the question: what system? Over time there should be a non-prescriptive archive, representing an evolved view of training activity. I have come to the conclusion, though, that the wiki model that some of us start from is not adequate to developing such an “archive” into a potent training tool. Hence my advocacy of a Course Management System, and in particular Moodle. Different courses yes: this is common sense with different audiences. Going back to the training premise in Part A, the point would be to have variety and choice within one brand, not competing models of the training field as a whole.

About HWW and open access. This book is released under the GFDL. It was held up for release under CC-by-SA by the sad circumstances of the illness of the late Ben Yates, my co-author. Ben died recently. I will be raising with Phoebe Ayers, the other co-author, the prospect of release under CC-by-SA. That would clear the way to adaptation of HWW to provide course material. But I shouldn't anticipate that step. That said, HWW could provide the framework for WMUK to post documentation for all WMF projects, updated and adapted to training needs. This seems to me a better outcome than a proposal to have a version of HWW on Wikibooks (these are not mutually exclusive possibilities, by any means). I would be very glad to participate in building a system that started as HWW + CMS and went on to allow for a range of courses based on that stock of existing material.

## **Part E: Response to offer to tender**

### **1. Personal details and references, voluntary sector involvement**

My general background is described in Part D as far as it relates to this tender. My work at the MRC and Geological Society workshops run by WMUK had feedback direct to WMUK. I also participated in the first and Hoxne Hoard GLAM events at the British Museum, working with curators: on the first occasion I worked with User:SeddonBM starting the “Minoan bull-leaper” article.

I have been a volunteer cognitive tutor, working with other volunteers and professionals, and running a weekly session, for Headway Cambridge, since 2003. During that time I have participated in two of their internal training days, and in one training event run externally (on vulnerable adults). Contact details via [info@headway-cambs.org.uk](mailto:info@headway-cambs.org.uk) or <http://www.headway.org.uk/branches/cambridgeshire.aspx>.

I have been working with volunteers since 1994 in various roles: local club, after-school club, voluntary organization (British Go Association), health sector (Headway Cambridge), online (Sensei’s Library wiki and then Wikimedia projects). My approach in brief comes to: avoid impatience; and uphold the volunteer ethic and the respect due to it. Around Wikipedia the former is key, but in my other experience it is the latter that is more telling, as far as I can see.

I understand and respect the outline doctrine of WMUK that professional staff should not substitute for work volunteers can do; though in my view this approach will have in practice to be clarified to define better the ancillary, supporting and co-ordinating roles appropriate to office staff, in particular. Discussion can help to move the community’s understanding of appropriate demarcation forward. The table in Part B is just an indication of what volunteer roles in training work could be in the longer term. Volunteers with PHP skills could be involved in Moodle developments, and that volunteers could be involved at all three levels of the “cake”, in the Manpower section.

### **2. Success and assessment criteria**

Success ought to be measured in terms of the confidence of the trainees that they would be able to adapt the material covered to a variety of situations, and the motivation they had gained to participate in training. I would construct a questionnaire along those lines, to be returned to WMUK. Assessment of trainees via TtT can be in a number of areas: such as comprehensive knowledge of Wikimedia, resourceful handling of queries, fluency and talent for teaching, ability to work as a team member, and “grace under pressure”. Accreditation standards are going to be worked out separately, however, according to my latest understanding of the WMUK strategy.



### **3. Charging structure, practicalities**

Accommodation with wifi, hardware, catering and some logistics are to work out with WMUK. If the tutor is to supply a projector there will be an upfront cost for that.

As outlined (six trainees), the tutoring charge for a one-day workshop would be £xxx plus out-of-pocket expenses. A scaled-up version with two tutors could handle nine trainees, but at £xxx for tutoring. Travel beyond commuting distance from Cambridge and overnight stays would have to be on an agreed basis. The price includes production of immediate materials, pre- and post-workshop. It assumes they would be in basic formats (email, handout and MediaWiki).

Moodle material development work: chargeable at £xx per hour for work using existing modules. Any programming work would be by arrangement and would involve a third party (volunteer or paid). WMUK would find any Moodle hosting fees; it is quite possible that WMUK could host Moodle on its own server, but I can't reasonably discuss this here.

### **4. Workshop timetable**

For an implementation of the type of workshop described in Part C as a 10 am to 4 pm one-day event, the following would be typical:

Morning:

Introductions (30 minutes)

Theory I (60 minutes)

Exercise (1) (60 minutes)

Participants bring up issues (30 minutes)

Lunch (1 hour)

Theory II (60 minutes)

Exercise (2) (30 minutes)

Analysis of the exercise as group discussion, wrap (30 minutes).

My availability to run workshops is broad, and includes weekends. I imagine being able to keep up with demand. If 10 workshops were required in the rest of 2012 then 60 would be trained. I wouldn't have thought a higher number would be realistic.

### **5. Online followup**

Covered in Part B as far as Moodle is concerned (the vehicle) and Part C under write-up. Initially the write-up can be pages on the UK wiki, but the ambition should be to migrate and integrate it.

For larger-scale thinking about online content, see discussion on “How Wikipedia Works” (HWW) in Part D. What is really required is a well-managed and comprehensive set of online materials: “managed” has to mean something different here from wiki-style development, which has its limitations (premise in Part A).

## **6. Open access**

There is a caveat to start with: good quiz and practical exercise material can only be constantly rewritten at a cost of substantial ongoing work. My assumption is that release of teaching materials would make some exceptions.

To give an example here, the question bank (or “FAQ pack”) mentioned in Part C is quiz material. But as envisaged there would (for instance) be 36 questions required to run a workshop, with 50% more generated by participants each time, So most of the bank could be made public: sample questions would be made available.

All teaching materials that would be released would be licensed under CC-by-SA. I would seek to have the attribution made to those who had worked up the material, as far as is possible.

There are points about Moodle and “Open educational resources” made in Part B.

Charles