



A Study of Tools for Collaboration and Partnership Working in Business and Community Engagement

Executive summary

The User Needs survey for Business and Community Engagement (BCE) identified collaborative tools as an area worthy of further attention by JISC. A series of activities studying the use of web tools for collaboration in the BCE sector was carried out by Netskills, including:

- Survey
- Follow-up interviews
- Set of “user reflections”
- Review of common collaboration activities and tools
- Lists of tools with future potential.

The study found that current usage is typically quite polarised, with a large body of users strongly favouring face-to-face meetings as essential to establishing and maintaining relationships, but supported by regular use of email and a small amount of experimentation with emerging tools. A growing minority were exploring a wide variety of sophisticated collaboration tools, with many examples of success, particularly in shared filespace and work areas, but also highlighting obstacles. In the context of partnership and collaborative projects, these included institutional systems that were not open to external partners, and lack of common skills and equipment. The study identified a clear need to disseminate information and guidance on effective use of new tools for collaboration with a clearly identified work benefit.

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Introduction

This report forms part of the JISC-funded project which Netskills carried out between August and October 2007, focusing on the use of, and potential for, collaborative tools by staff working in business and community engagement (BCE). The report is in response to findings in the BCE User Needs study identifying collaborative activities as an area for JISC support, and builds on earlier studies including Netskills/JISCinfoNet survey on Social Software. The data gathered should help to establish ways in which JISC and the JISC Advisory Services, among others, may be able to offer support to the sector in its use of collaborative tools.

1. Project methodology and outputs

The project includes a number of outputs and activities, which comprise in brief:

- A survey and analysis contained within this report
- A series of follow-up interviews to further explore issues raised
- A set of personal reflections on usage of collaborative tools
- A compilation of collaborative tools and activities
- Attendance at the AURIL conference, at which interim findings were disseminated
- Liaison with AURIL, IKT and other stakeholders
- Development of plans for follow-on work to disseminate and engage with the BCE community

2 Survey overview

A survey to capture the current state of usage of collaborative tools, and the underlying collaborative and partnership activities was carried out online, hosted on the Netskills website, but also featured on the survey facility in the Global Innovation Network, hosted by the Institute of Knowledge Transfer.

2.1 Publicity

The survey was publicised via various means including:

- Emails to relevant mailing lists, including JISCMail-hosted lists and lists managed by other organisations, such as AURIL
- Contacting people involved with relevant projects and ventures
- Through attendance and an exhibition stand at the AURIL conference with flyers
- Respondents to previous surveys
- Posting announcements on relevant messageboards
- Dedicated sections of the Netskills' web site

As an added incentive, a prize draw for Amazon vouchers was offered.

2.2 Overall response

The survey received around 100 responses in total, a figure in line with other surveys in this area, the short timescale of the project, and the abundance of surveys and studies recently carried out. 18 of the respondents who had agreed to be contacted further were followed up by face-to-face and telephone interview, to further explore and clarify survey responses, gather further information on useful examples, and build up a more detailed picture of usage and challenges with using tools for collaboration.

3 Analysis of survey results and interviews

This section explores in detail the responses to the survey, both multiple choice selections and open-ended questions. In addition, brief comments from the interview data are added in the way of additional quotes integrated into each section, to reinforce or add further detail to the results. More detailed comments are documented separately in the “User Experience” document, included as appendix B.

About the respondents and their partners

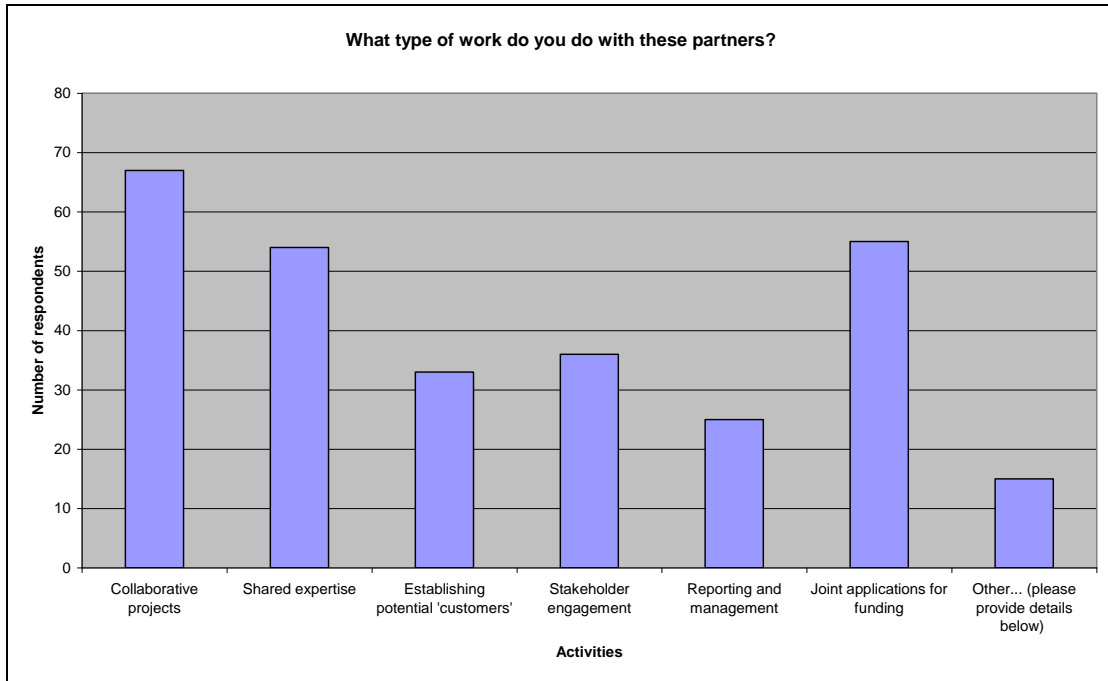
Respondents were asked to provide job titles, as in previous surveys, rather than select from a list, given the known multiplicity of roles in this sector. The range was varied, and included technology transfer, business development and liaison, enterprise, partnerships and collaboration, research and innovation, outreach, commercialisation, contracts and IP.

Participants were also asked to briefly describe their role, to help identify further the type of BCE work they were involved in, and specifically what type of partners they work with. Ones listed include:

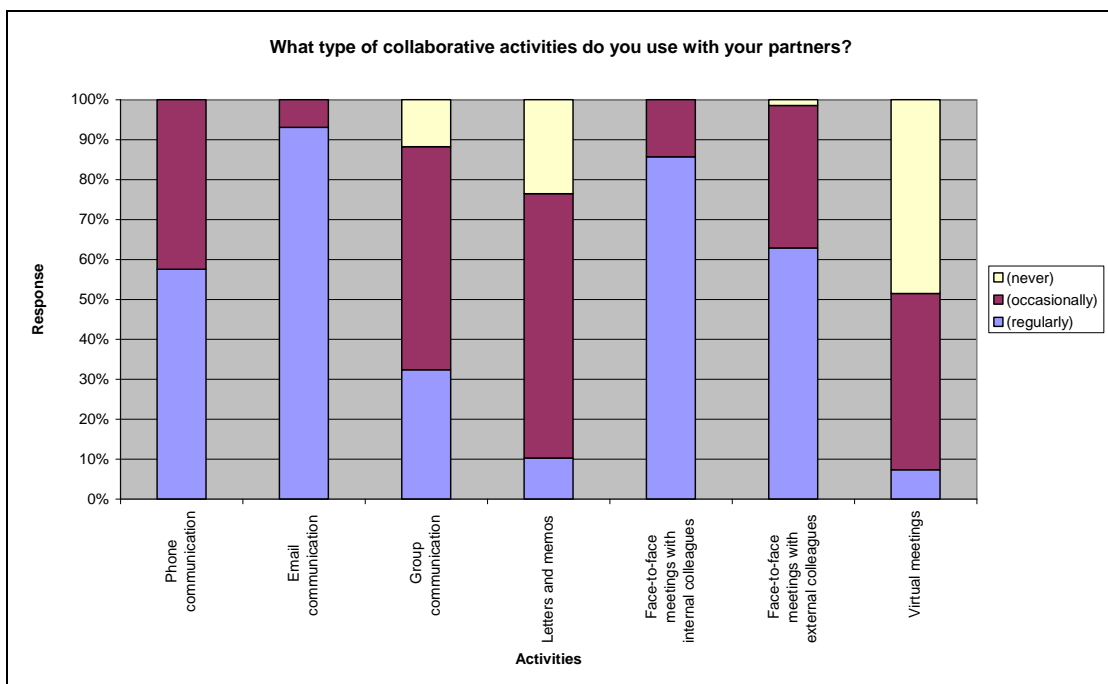
- RDA, subregional and regional partnerships
- Business link, Chamber of commerce, local councils
- Government
- Other HEIs and FE providers
- Funding bodies and agencies
- NHS
- Medical companies
- NGOs, charities and trusts
- SMEs, larger companies, industry
- International partners – in education and commerce
- National and international membership associations

Collaborative activities

This section aimed to investigate the type of activities respondents engaged in with their partners, leading onto what tools they currently use to support or enable that collaboration in the next section.



Collaborative projects, joint applications for funding and shared expertise were the 3 highest responses, corroborated by interviews that mainly discussed the preparation, submission and implementation of projects and project proposals amongst partners and collaborators.



Email communication and face-to-face meetings with internal colleagues were the most common forms of collaborating/communicating, with face-to-face meetings with external colleagues and phone communication close behind. This response was reinforced by interviews and open comments in the survey that highlighted one of the key findings of this study -

Despite the advent of many new tools and technologies, face-to-face is strongly favoured for establishing and building up relationships, and maintaining personal contact. In many cases this is seen as critical to the collaboration, with respondents frequently quoting that no tools they have used or seen come close to replicating the important nature of the communication and relationship.

However, further exploration in interviews identified a larger number of respondents experimenting with collaborative tools, with some success, to complement the core face-to-face relationship and, in a minority of examples, used successfully without face-to-face interaction.

Questions about email were included both in “activities” and in “tools”, reflecting that for many people now, email is a standard office facility, in the same way that the telephone is. In fact it was interesting to note that despite an apparently “traditional” approach to communication and collaboration from a number of respondents, electronic means such as email had almost replaced the use of letters and memos. This is especially interesting given the contractual nature of many interactions.

A notable repeated comment in the open responses was face-to-face events, workshops, seminars and conferences, again reinforcing the importance of the face-to-face interactions.

Responses to the open question “what is the most important collaborative activity” showed 28 mentions of face-to-face, meetings or personal contact, and an identical number mentioning email (in many cases face-to-face and email were jointly listed). Only three responses specifically referred to telephone, one mentioned skype and two mentioned shared/collaborative environments.

Individual comments included:

“Must be able to communicate like a legend!”

“Email, phone, face-to-face meetings, increasingly group environments because so many partners are required for funding opportunities.”

“Intimacy of interactions that are face-to-face, back up by email.”

“Face-to-face is most effective to swap/gather ideas but email is, unfortunately, necessary when co-ordinating many people. Email is a very poor 'engagement' tool with academics. Group meetings can be very effective if managed well.”

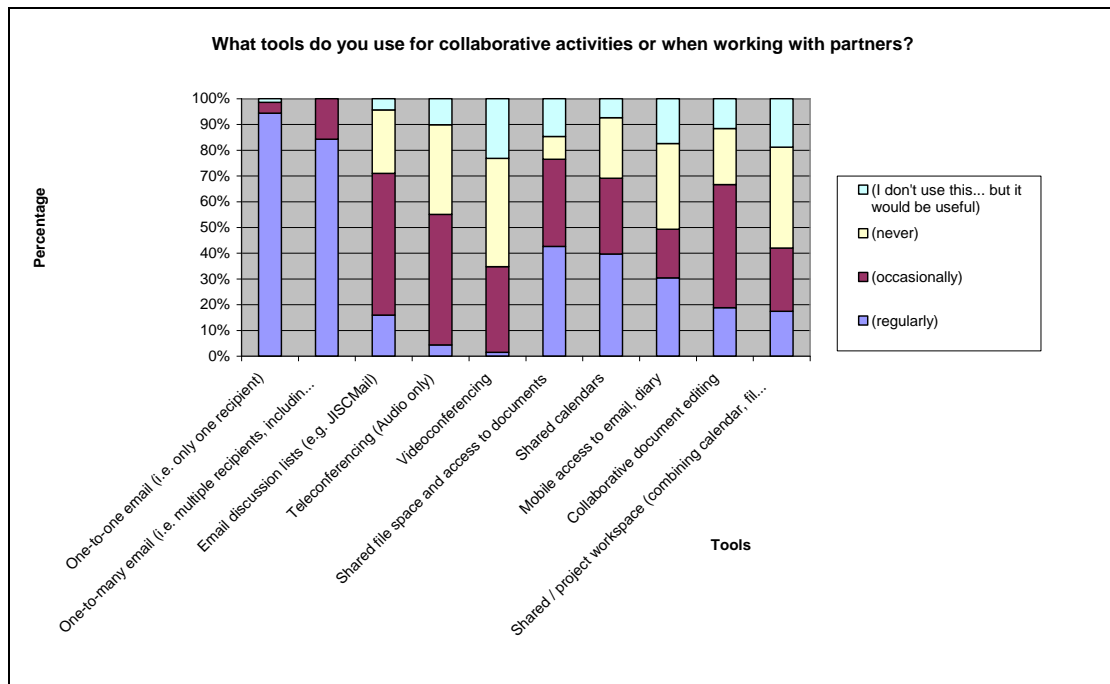
“Email is the most flexible and useful activity.”

“Email and collaborative environments e.g. Sharepoint”

Tools for collaboration

Participants were asked to indicate their level of usage (in terms of frequency) for different types of collaborative tool, including “regularly” (once a week or more) and

“occasionally” (once a month or more). If they didn’t currently use an item, they were asked to specify whether they would find it useful.



The previous study on social software acknowledged a partially self-selecting audience familiar with, and interested in, the terminology and technology. In contrast, this study attempted to avoid using jargon (such as Web 2.0), focusing instead on familiar and transferable activities, and using generic terms for types of tools such as “shared filespace”. The motivation behind this was to capture a more representative audience, and draw out areas of possible limited use of technology, where future support from JISC could most benefit.

Email

Email again was by far the most commonly used, this time distinguishing between one-to-one, one-to-many and discussion lists. One-to-many email communication reflected comments by individuals that most of their messages were copied to a number of recipients, often receiving many messages where they were one of those copied in, rather than the main recipient, with implications for managing “information overload”. Discussion lists showed a surprisingly low response for “regular” use, but may mask activity between specific communities that use other methods or terminology, or indeed that these are seen as more of an “occasional use” tool for this group – with approximately 55% responding as occasional users.

Conferencing

Also surprising was the minimal regular use of teleconferencing and videoconferencing. Whilst the latter has for many years been limited by lack of easy/cheap access to good quality equipment and facilities, the former is seen as a convenient and effective tool (but only by a minority who use it). Over 20% (the highest figure for this response category) rated videoconferencing as something they didn’t use but would be useful, perhaps because of the perceived closeness to face-to-face interaction. It could be inferred though that because of the need for the right

equipment, occasional use is more likely, with regular use being reserved for “desktop” facilities available to people daily.

Shared spaces

Use of shared filespace and calendars was significant. Many of the practical examples of most benefit to people featured a common shared space where they could store and retrieve documents such as proposals. Limitations included the lack of easy facilities to jointly edit or manage the versions of a document. This shows in the lower response to “collaborative editing” of a document. Facilities such as “track changes” in word were commonly used, but often made complicated by the lack of an agreed single owner of the document, and multiple copied being circulated, frequently by email.

Shared diary systems mentioned were sometimes limited by difficulties in internal institutional configuration, which made access by external partners problematic, or impossible in some cases. The same was true for some in the use of shared filespace and workspaces, where the institutional set up, using staff/student logon, prevented adhoc use by external partners. More than one example quoted setting up a separate system outside of the institution in order to overcome this issue. Shared workspaces gave the second highest response for having potential to be useful.

Mobile access

Mobile access to email, diary and other features is increasingly common, although most respondents refer to a limited use of what they see as a range of useful features available. The nature of the work in BCE means that a lot of travel and meetings remove people from their office and mobile access allows them continuity in their communication and collaborations. Responses were fairly polarised, with one of the smallest responses in “occasionally” – implying that once people started to use this, it became a regularly used tool.

Other tools

Tools listed in the open response box included:

- Skype
- Instant messaging
- Text messaging
- Intranet
- Specialist internal systems eg to track negotiations and contracts
- LinkedIn
- Google groups

One comment was *“I use many of these tools internally, but very rarely externally with partners.”*

Another respondent said *“We use Sharepoint which allows Web-based collaboration as well as shared document editing. We don't want to have to use lots of different tools.”*

Open ended questions

The survey, and subsequent interviews, relied heavily on open ended questions, to elicit personal reflections on the usage and success or otherwise of tools for collaboration. A selection of highlights from these comments are included in this section, under a series of headings – effectiveness, benefits, concerns, suggestions to enhance, examples of good practice, and other comments. Where appropriate, responses have been gathered together into categories to identify key themes and to aid understanding of the overall patterns in the responses.

Effectiveness of collaborative tools

The survey asked for comments on the effectiveness of collaborative tools. Responses included a number re-iterating the importance of face-to-face, either as the only effective means to collaborate, or as a key element amongst a set of “tools”:

“All of these work best when supported by strategically positioned face-to-face or telephone work...”

“We have difficulty contacting people by phone (busy calendars etc) so email is often best. However, where possible, we find that face-to-face is best.”

“Many have their place but at the end of the day a phone call is often the most effective - and efficiently chaired face-to-face meetings.”

“No amount of technology is a substitute for the effectiveness of one to one interactions”

The skill level of users or varying needs of different users was echoed by a number of responses:

“There are now too many of them, I often feel overwhelmed and simply can't remember which one to use.”

“As some partners are ahead of others in terms of ITC usage it's not always possible to utilise the most effective approaches.”

“Mostly the IT works well. People attach too many things that they could have put in the body of the email, which slows things down.”

“Flexibility is key to effective communications and partners respond differently to a variety of methods.”

Another theme was the difficulty in setting up tools which restricted their use. Later comments build on this, particularly with respect to the institutional support for systems across external partners.

“If the tools are not regularly used by all involved partners, the effort of setting them up may outweigh their usefulness.”

“Video conferencing is a tool we would like to use more often but haven't really used it due to technology limitations and setup time and costs.”

Other general comments included:

“Impressed with JES recent improvements, impressed with distributed authoring capabilities on i10 internet, impressed with profile search capability on cordis.”

“I feel that the University has not recognised the need for better IT support to MANAGE collaborative activities. The communication with partners is less of a problem but how we manage our internal project data has been dictated to by only having access to Excel which is a somewhat piecemeal solution.”

There were a few mentions of having heard of blogs, wikis, social networking, and Web 2.0 in general terms. The small number of these responses does suggest that this survey attracted a different, and broader, audience than the Social Software survey. As quoted in the latter, the Hill-Farmer survey found *“There were a few examples of the use of wikis and blogs being used for BCE purposes, but no instances yet of the use of social networking software.”*¹ Research for the Social software infokit found a few ideas and plans for social networking in the BCE sector, but very little in practice.

The social software survey also asked about obstacles that made them give up uses of social software. 9% of respondents said they had tried and given up use of a tool, with the most common reasons cited being network filters blocking access to social software, lack of purpose and lack of time.

Related comments, particularly on blocking and filtering, were raised in this survey, for example in the context of logon access to systems such as Sharepoint for external partners, or trying to use Facebook.

Benefits from web tools for collaboration

A wide range of comments were given on what were seen as the perceived benefits of web tools for collaboration. As one respondent put it *“It depends of the type of collaboration activity”* – which reflects the diversity of the audience and their responses. However, a number of related themes can be identified, within which some of the responses are detailed below: In addition there were a number of repeated comments about saving time, money, effort and travel, and the recognition of flexibility, ease of access from anywhere, speed of response and the ability to share more widely.

Sharing documents and workspaces

“Ease of adding documents for wide-spread viewing”

“Distributed, group document management for development and new product introduction progs”

“Access to tracking documents and ability to use online/digital signatures securely.”

¹ Hill, Stephen and Farmer, Julie (2007), *How JISC could support Business and Community Engagement*. p.20. Op.cit

“Web-based secure document editing would be useful.”

Communication and interaction

“I think the possibilities would be endless. Partners would be able to communicate more information, quickly, efficiently and at the same time control access and data protection”

“Distance collaboration, last minute communications, records of exchanges”

“Greater interactivity, more sociable tools”

“Quality of work can improve, Experiences can be related quickly, Real time exploration, Multiplicity of responses”

Access

“Should be easier to access for external parties.”

“Pragmatic requirements, especially where geography limits interaction and people can come together virtually for targeted and time limited exchange.”

“When possible, web casts/conferencing should be used to bring in people from long distances. Web-based tools can be very useful for archiving discussion points and sharing of ideas in an organised format.”

General issues

“Critical that they support effective business processes and do NOT simply automate poor processes.”

“Biggest problem is spam, so better filtering knowledge is needed.”

“Easier to set up meeting if sharing diaries but don't think everyone would be happy to share diaries.”

Concerns

The survey asked if there were any concerns about using web tools for collaboration, any limitations or barriers. A number of themes emerged: security, personal interaction, skills or access, and technical or set up.

Security

The top concern was security, confidentiality and privacy, listed by 19 respondents, with comments including:

“Security or misuse of digital signatures, access issues to confidential documents used internally and externally.”

Personal interaction

There were strong feelings, expressed in a variety of ways, about the difficulty in replacing or replicating face-to-face interactions:

“They can be very distancing personally and can reduce the effective working of the group if they create divisions.”

“A complete absence of face-to-face meetings for project formation in particular makes email communication more important in conveying characters of individuals. Emoticons, grammar and style can only convey so much. Collaborative tools need to incorporate a visual element and social element to ensure that teams come together holistically.”

“Face-to-face meetings are important at the outset of collaboration and to finalise certain milestones / negotiations etc.”

“The biggest is the human factor, the nuances that come with close interactions in the flesh!”

“Customer personal interface is essential on occasion. Therefore a blended approach would be effective. Knowledge transfer/enterprise activity is a contact sport!”

“A poor substitute for meetings. No social presence.”

Having appropriate skills or access to equipment or tools:

“Confidence of partners to use them.”

“Everyone doesn't have access to the same tools, versions, bandwidth, experience with tool, will to use tool...”

“Ease of use compared to programs resident on the desktop computer.”

Technical and set up

“Setup and maintenance issues would be a limitation. Who would maintain such web tools and what are the cost implications?”

“Barriers are paying for domain names, space for hosting, and technical ability (or lack of).”

“Time taken to get up to speed with technology, outdated hardware / different OS and software, time zones.”

“Too many HE tools have restricted access when you are off campus... the HE firewall as a result few systems engage clients and partners they tend to be internal only... missing a trick!”

General comments

“Just the proliferation really. Makes my head swim.”

“Ensuring that members of the group use the tools to avoid having to duplicate effort such as posting tools to a file sharing area (Google Groups) and still having to email it to individuals.”

“If several people are editing documents at the same time it is hard to know what is the most current version.”

What feature/function would most enhance your collaboration?

This question extracted possibly the most varied and individual set of responses, from those who answered it. What is clear from the responses is that many of them can readily be satisfied through raising awareness of existing tools, for example:

“A really easy free wiki, which needs little technical skill to personalise for a group”

- Many different free to use wikis exist that are easy to use within minutes

“a quick & easy way of co-ordinating diaries for meetings”

- Tools such as meet-o-matic are gaining popularity for coordinating meetings

“Editing and tracking changes in documents”

- This is readily available in MS Word, although it is possible this relates to a request that similar functionality be available through a shared web space

“Shared calendar; shared documents, sometimes with shared editing.”

- A number of shared workspaces provide some or all of this functionality

More general comments included:

“Shared whiteboards that are easy to use and reliable over a variety of platforms.”

“More support from IT department with regards to new web tools and there installation.”

“Secure document collaboration with full MS Word functionality (as Word seems to be the standard).”

“An online tool which could shift and change according to what its users require...a glorified Amazon for intellectual pursuits of a collaborative nature!”

“Shared project planning tool”

“Increased speed of remote e-mail connection, direct access to all files rather than through web-based access.”

“Improved data management/entry at a university level, that I could then access and circulate to external partners.”

“Integration e.g. CRM with shared workspaces etc...”

Examples of effective collaboration

People were asked to describe an example of effective collaboration using web tools, further explored as one of the key elements of the interviews. Below are a number of extracts from their reflections, using direct quotes from the respondents and interviewees to accurately capture their exact words and feelings.

Sharing documents and workspaces

“Use web-based portal to store info/communication doc. Individuals can comment when they have time. Doesn't require face-to face or 'catching' people.”

“Use of SharePoint to work collaboratively on documents, use of JeS for same.”

“The group utilised a range of online tools for sharing, and feeding into, research outcomes, including consultations, online diaries of those involved and a range of tools which helped identify policy, academic and public drivers to secure buy-in.”

“Our sharepoint site for sector groups work across 13 HEIs and 200 academics... facilitating meetings, actions, planning, opportunity sharing, document management, CRM etc..”

“Working with my team of regional officers on a project using blog space, Google calendar, and Google spreadsheet to have online meetings and work through a project.”

General collaboration examples

“Use a blog and wiki for collaborating .. which works very well as they are on another site from me.”

“Presently running a transnational project involving four countries, work accomplished and time saved has been very cost effective.”

“Most university web-based intranets operate as a form of collaborative tools. This is critical to my work within the University, however, it does not extend to the host of collaborators and potential collaborators I work with beyond the University.”

“Ask i10 works reasonably well. I have collaborated in the past using Lotus Notes and Exchange/Outlook public folders, but web is preferred as maintaining client software is difficult.”

Diary

“We use an online dairy so that we are all aware of where our colleagues are, as we are often out and about.”

Communication

“Working with group in India using Skype conferencing we can call and see one another at no cost.”

Archive material

“I like listen again functions so that if you cannot be present at a certain time, you can still benefit from hearing the discussions at a later time.”

Other comments on tools for collaboration

A final opportunity to give any additional comments raised some interesting and diverse responses, many of which reinforce the need for a second phase of dissemination work to follow on from this study. However, some also caution the danger of being driven by technology rather than addressing a need.

“Information on what is available and what it can be used for would be useful - workshops to showcase?”

“Many of the partners we work with would be very happy to be trained up to use web tools in conjunction with collaborative work, however the implementation of web tools would need to consider training and maintenance as well as good publicity.”

“I'm sure there are some fantastic ideas that I would find very useful but ... am not aware of the latest developments!”

“I am sure there are useful tools available but it is difficult finding out what is available, what experience people have of using them, performance etc when you are so busy trying to run large collaborative projects!”

“I'm afraid I think these are "solutions looking for problems".”

“Basics are still true- the best tools naturally 'fit the hand' i.e. start with the need and find the tool which meets that need best not the other way around and be ready to resource usage - need to keep finding reasons for users to engage.”

Interviews

Aspects of the survey responses were targeted where it appeared that there was a specific example or experience. Open questioning was used with interviewees, to extract a description of the collaboration activity, the tools used, and to reflect on how they and others had found the experience – whether good or bad.

The aim of the interviews was to gather a set of informal and personal reflections on user experience, and not to compile formal case studies or attribute comments to individuals. For that reason interviewees were not named in the documentation, but further work could involve a more formal follow up with the individuals and a set of agreed and attributed quotes. Appendix B contains a detailed set of personal reflections on usage of tools, categorised into different areas of activity. Within each area of activity, tools referred to by the respondents are noted, along with a number of other known tools that could be useful in the context of that activity, and may form part of future dissemination or engagement work.

5. Conclusion and recommendations

This study has identified the scope of collaboration activities taking place, and captured a snapshot of tools currently used. One key theme was the strength of feeling behind the belief that face-to-face is often the best approach. In some contexts this view was held in the absence of any significant evidence to the contrary, through lack of experience of available collaborative tools. However, the importance of personal contact and the establishment and maintenance of relationships is a key criterion for engaging with partners. Any further work should not attempt to contradict this, but acknowledge it, and work to find and demonstrate examples where tools can enhance and build on current practices.

There is a clear need to help raise awareness of available tools for collaboration, in a very practical way, with staff working in BCE areas. A wealth of interesting and successful examples were identified within the study, ranging from using Skype for international communication, to sharing documents through Sharepoint and having mobile access to email. More down to earth, common activities, such as jointly working on a project proposal, would be excellent examples to illustrate the benefits and limitations of tools such as wikis or other document creating and sharing systems. Shared workspaces and documents were the most commonly used collaborative tool in the follow-up interviews, and generally those that had invested the time and effort to establish such an environment found the rewards and benefits to be considerable.

Issues such as security, confidentiality and access, including the obstacles to access for external partners through inward focused institutional systems, would need to be considered carefully.

Good resources exist, such as good practice guides, and networks through AURIL and IKT are well established, with innovative approaches to collaboration and tools. It would be essential to continue to build strong links with these organisations and their members, and link in with their current activities and programmes. Specific initiatives mentioned include the KTP Online facilities, KEGoodPractice from HEFCE and the Global Innovation Network from AURIL.

It is proposed that a programme of activities is designed to disseminate and engage staff working in BCE with a wide range of tools for collaboration that fit their needs. Using themes and examples from this study, these activities could comprise the following:

1. Further documentation through mini case studies of good examples of collaboration using tools, linking to good practice guides and other existing resources
2. Development of a “toolkit” to map collaborative activities to available tools
3. Testing of the toolkit with BCE practitioners
4. Identification (through use of the toolkit) of a small set of practical examples of easy to use and widely available tools that fit common BCE activities
5. A series of one to one sessions with individuals to support them in trying out these tools
6. Documentation of their experiences

7. Development of a workshop, drawing together the tools, toolkit and usage experiences
8. Running a programme of these workshops throughout the UK, including guest speakers on good practice examples

Rob Allen, Netskills, November 2007

Appendix 1 – Survey Questions

Netskills is conducting a survey of the collaboration activities that take place between Higher Education Institutions and their partners. We welcome responses from everyone involved in such partnerships, from both business and education perspectives.

Everyone who completes the survey will be entered into a prize draw for £75 of Amazon vouchers!

The survey should take no longer than 10 minutes to complete.

About you

- Name
- Job title
- Organisation
- Brief job role

Collaboration and Partners

- What partners do you work with?
- What type of work do you do with these partners?
 - Collaborative projects
 - Shared expertise
 - Establishing potential 'customers'
 - Stakeholder engagement
 - Reporting and management
 - Joint applications for funding
 - Other...
- What type of collaborative activities do you take part in with your partners? (regularly, occasionally, never)
 - Phone communication
 - Email communication
 - Group communication
 - Letters and memos
 - Face to face meetings with internal colleagues
 - Face to face meetings with external partners
 - Virtual meetings
 - Are there any other collaborative activities you use?
- What collaborative activity is the most important to your role?
- What tools do you use (regularly, occasionally, never, I don't use this .. but it would be useful) for collaborative activities or when working with partners?

- One to one email
 - One to many email (i.e. multiple recipients)
 - Email discussion lists (e.g. JISCMail)
 - Teleconferencing
 - Videoconferencing
 - Shared file space and access to documents
 - Shared calendars
 - Mobile access to email, diary
 - Collaborative document editing
 - Shared/project workspace (combining calendar, file space, contacts)
 - Interactive communication tools with 'customers'
 - Are there any other tools you use for collaborative activities?
 - Do you have any comments about the **effectiveness** of the tools you use for collaborative activities?
- Have you heard of any new tools / technologies that might be useful for collaboration?
 - What benefits do you think may be offered by web based tools for collaboration?
 - Do you have any concerns, about using web tools for collaboration? Are there any limitations or barriers?
 - What feature or function would most enhance your collaborative activities?
 - Can you describe an example of effective collaboration using web tools?
 - Do you have any further comments about either collaborative activities or web tools?

Prize Draw & Follow-up

During the next phase of this study, Netskills will conduct short interviews about the specific use of collaboration tools and people's experience of using them.

Are you willing to be contacted as a follow-up to this survey?

- yes/no

If yes, please provide contact details

- email
- phone

Do you wish to be entered into the prize draw for £75 of Amazon vouchers?!

- yes/no

If yes, please provide your email address so we can get in touch if you win!

- Email

Appendix B Activities, Tools and User Reflections

Activity: Sharing project documents, collaborating on proposals	
Sharing, editing, annotating, word processing, online storage, shared content, editable web pages, group documents	
Tools used	Wikis
Reflections	<p>“We’ve used a wiki with other organisations, find it really useful, as many people as you like can all edit the website, as a central resource within a restricted group.” (Science Engagement and Communications Officer)</p>
	<p>“I’ve been asked to write the wikipedia entry for our consortium project. Wikipedia is one of my most visited sites on the net. Quite often, if I just want basic information, I go to wikipedia, whereas a generation ago I’d have used encyclopaedia Britannica. It’s less reliable, but much more up to date.” (Senior Associate Lecturer)</p>
	<p>“We’ve got a collaboration between academics and the BBC, using a wiki developed to aid discussions, house material and allow feedback. It’s a very positive response. It was not open to the public, there was an element of trust because of this restriction to being within the group. It was very useful to the group, people found they could pick up a topic at any point and leave feedback.” (Research Exchange Manager)</p>
Tools used	Google docs and spreadsheets
Reflections	<p>“With other institutions I use Google Docs to work on a shared project. We post updates such as the project schedule there. A great tool to enable us to keep our documents and save emailing around. With email there’s always a chance we’ll miss someone off, this gives us a common site that everyone can go on, and there’s no big attachments to email. It’s the way we communicate with each other, through updates on the site.” (Business Development Manager)</p>
Tools used	MS Word – track changes
Reflections	<p>"This works to some degree, but it does get messy and you do have to be careful. If one person updates the document but doesn't have track changes turned on, those changes can be missed. I always perform a side-by-side comparison of documents if I'm in charge of the final version." (Business Development Manager)</p> <p>“Using word we email documents back and forth, we use track changes but it’s awkward, we have to wait for someone to send it back. Helps if you know who’s seen it. A wiki could probably replace</p>

	<p>this, but could it track the changes and authors? Barriers would be privacy.” (Science Engagement and Communications Officer)</p> <p>“With instant access to information, it's harder to reach agreement between partners on a particular issue. It's so easy to change a document now ... and most contributors want emendations and to make changes." (Business Development Manager)</p>
Examples of wikis	
	wikipedia.com
	wikimatrix.org
	wetpaint.com
	tiddlywiki.com
	twiki.org
	pbwiki.com
Examples of similar tools available	
	us.ajax13.com
	www.thinkfree.com
	briefcase.yahoo.com
	pages.google.com
	www.codingmonkeys.de/subethaedit

Activity: Sharing workspaces for groups and projects	
Shared filespace, group membership, tools for calendaring and communication, intranet/portal	
Tools used	Intranet/custom built web portal
Reflections	<p>“just using a web browser, tends to be slower but if using occasionally it’s easier to get to. As administrator you don’t have to support client software.” (Head of Knowledge Transfer)</p> <p>“if a business enquires whether we can help, a message goes to a moderator then we can go back onto the platform and see if we can help them. It also creates a record on the CRM for the enquiry. It’s taken us a while to arrive at this infrastructure, but now people are contributing regularly.” (Head of Knowledge Transfer)</p>
	<p>“Using our project website, only certain people can access. It’s used to store resources that we’re developing. Several different partners work together on resources, they can be edited by anyone and changes are tracked, it’s good because there’s only a single copy and we’re not constantly downloading and emailing copies around.” (Learning Manager)</p>
	<p>“We used a website set up specially for the project, incorporating shared document space, collaborative editing, and calendars. It was good to have our own private area, anything we need we put on it”. (Business Development Officer)</p>
	<p>“We have an intranet where we are able to put up articles and post common documents, access finance information that is relevant to us. From a project management point of view it is very useful. When collaborating we need up to date access to finance, project deliverables, it’s important that you have access to it at all times. We all need access to a common database.” (Senior Research Fellow)</p>
	<p>“The main benefit is you don’t have to email documents back and forth” (Head of Knowledge Transfer)</p>
Tools used	MS SharePoint
Reflections	<p>“We starting using SharePoint as a knowledge management tool, to capture what people are doing and share it, but then we started to use also as a project management tool. Saves having two systems, and we found that in capturing what people were up to, we were capturing the project. We got project managers to record what they were doing alongside people using it to share experiences and discuss topics.” (Director)</p>

	<p>“The initial reaction was it’s another system to learn, but we had to find a few benefits to change people’s perceptions. First was that it integrated with other MS tools they were already using, secondly they could access it remotely from anywhere. Also it was made clear that if it’s not on SharePoint it’s not happening in the project, so there was a compliance reaction.” (Director)</p> <p>“The challenge is getting people to remember not to just send an email, and if they’ve got a spreadsheet, people can’t see it if it’s only on their machine. It has essentially created a shared hard drive for them all, where all documents can be accessed.” (Director)</p>
	<p>“SharePoint is being introduced for our intranet. We use the shared proposals area for internal review and editing of documents. But people are more familiar with email – always end up emailing them to remind them to look on SharePoint.” (Project Development Manager)</p> <p>“It’s configured to be hosted internally for information sharing, so is impossible to use by external partners.” (Project Development Manager)</p>
Tools used	Google Groups
Reflections	<p>“We wanted to build a project website and someone suggested Google Groups. We established a “closed” group, by invitation only, but invited the project team plus advisory board, executive etc. We file our project documentation there, reports, minutes, all in one place, everyone has access to them. We all have our own profiles and have a shared calendar, so rather than emailing dates around we can share the same copy.“ (Deputy Director - Enterprise)</p> <p>“It’s incredibly quick and easy to set up. It doesn’t cost us anything, just requires a Google account, then we are all working from the same place, a definitive set of documents.” (Deputy Director - Enterprise)</p> <p>“It’s been tremendous, people are really responding to it. We’ve set it up so that each day if something new is added there’s an alert, but we roll them up into a single message each day so it saves lots of emails as well.” (Deputy Director - Enterprise)</p>
Tools used	“Learning environments” – Moodle, Blackboard/WebCT
Reflections	“WebCT had a chat room for student communication. We wanted to use this for partner projects – but it was blocked by the firewall”

Activity: Sharing Calendars and Diaries	
Sharing calendars, Coordinating meetings, Managing events online, reminders, send invites, manage responses, co-ordinate timing, filespace for an event,	
Tools used	Meetomatic.com
Reflections	“A partner today sent me a meet-o-matic request for a meeting, that looks like it could be a really handy tool. A lot of partners use Macs so it is difficult to use a tool such as outlook to book everyone on to a meeting” (Project Development Manager)
Tools used	Outlook across a group network
Reflections	“We use outlook/exchange to collaborate internally within our business development team, this is now rolled out to collaborate with other institutions and companies, but I had to go around and make sure that it was all correctly configured, the amount of effort involved was high.” (Head of Knowledge Transfer)
	“I use shared calendars with my team, we have access to each others calendar, it helps us coordinate our work and have an idea of what’s going on amongst the team.” (Head of Knowledge Transfer and Business Partnerships)
Tools used	google.com/calendar
Reflections	“We’ve used shared calendars occasionally, it gets complicated with external partners, what you show and what you don’t show to them.” (Business Development Manager)

Activity: Communicating (email)	
Electronic communication, one to one and between a group or list	
Tools used	Email
Reflections	"Email is fine up to a point, it's still the primary means of communication. But you often find that you're copied into everything and it's difficult to sift the wheat from the chaff!" (Head of Research Development Services)
	"Email helps me manage my time better, compared to phone calls and knocks on the door. I use face to face when I need to find out a bit more than what people are saying by email, to pick up the visual clues etc." (Head of Knowledge Transfer and Business Partnerships)
	"The assumption is that people are always there to receive and respond to an email. Knowing what people have done with your email is unclear." (Head of Research Development Services)
Tools used	Email discussion lists and discussion forums
	"Mailing lists – I have used psci-com and other lists, mainly for finding out general information about what's going on in the sector." (Learning Manager)
	"I use JISCMail and newsgroups quite a lot. A lot of organisations now set up 'communities of practice'. Email mailing lists are the primary way of engaging with our community of practice, to share common interests, see what's going on and make contacts." (Senior Research Fellow)
	"We have an international network of academics, they interact on an international web forum Advantages were the global distance covered with disparate academics across the globe. Didn't inhibit their ability to collaborate." (Research Exchange Manager)

Activity: Conferencing and holding meetings	
Conferencing via audio, video and web tools.	
Tools used	Teleconferencing
Reflections	"Teleconferencing works best if someone is clearly in charge. But it doesn't work well when complex or inter-related issues are being discussed or when a decision is required. ...people can always put the phone down, but if they're at a physical meeting they tend to be more committed " (Head of Research Development Services)
Tools used	Videoconferencing
Reflections	"Videoconferencing can be difficult at first, but in general works well. We can get together several people from different locations at the same time, in place of a face to face meeting. It's difficult at times, to manage who's talking and make sure people are not talking over each other, and it's not quite as personal as face to face, but it's great for the convenience." (Learning Manager)
	"Not a huge fan of videoconferencing, I tend to find online interaction to be easier. Also we need to uproot everyone to go to a video conferencing suite. Using our web tool we can have everyone sitting at their own desk." (Manager)
	"I've used conferencing with our consortium, to have a meeting with all people there at the same time. It worked, but wasn't always straightforward. Getting all of the people to be running the same software at the same time in different countries was a challenge." (Senior Associate Lecturer)
Tools used	Online conferencing
Reflections	"We use Webex quite a lot – it is a web tool with audio and allows us to share desktops. We are running a project with the united states. We have a weekly webex meeting, they can look at what we're doing, pass documents to one another. It has enabled us to project manage a fairly major project from both sides of the Atlantic, as good as face to face. We also do product demos." (Manager)
Tools used	Skype
Reflections	"I'm working with a group in India using Skype conferencing, we can call and see one another at no cost. It's very useful, and quick, quicker than email. I can use it at my desk without going to a special room or needing special equipment." (CPD Manager)

	<p>“It allows multitasking in an easy way - I’m using it now as we talk, with 3 conversations going on. It can be intrusive but I can turn it off.” (CPD Manager)</p> <p>“The video is more than adequate, as is the phone. It’s nice to see clients I haven’t met, by video, all in real time.” (CPD Manager)</p>
	<p>“Used Skype extensively, very cheap and easy to use, all partners had access and could be communicating simultaneously.” (Business Development Officer)</p> <p>Skype was “really good until I changed my computer, I installed it myself, but now the University doesn’t support skype and I can’t get it on my new computer”. (Business Development Officer)</p>
Other tools available	www.yackpack.com

Activity: Mobile & remote access to individual and shared data	
Accessing email, diary and other features whilst travelling or working away	
Tools used	Outlook web access, Mobile windows on smartphones/PDAs, WAP
Reflections	“I accesses email via my mobile phone, through outlook web interface, it’s very useful as I travel around a lot.” (Head of Knowledge Transfer)
	“I use my mobile phone to sync with my calendar at work. I’ve got access to a communications network from wherever I am.” (CPD Manager)
	“I use outlook/exchange on my laptop, we’ve struggled with PDAs, never got them to talk to the server and the desktop together.” (Head of Knowledge Transfer)
	“I like being able to access my email remotely, I do this from my laptop or remote sites. I haven’t got to using my phone for this yet.” (Head of Knowledge Transfer and Business Partnerships)
	“Everyone uses shared calendars, 16 people are using this regularly, one user wanted to do it on their PDA but it didn’t work.” (Head of Knowledge Transfer)
	“I use my laptop when working from home –works just as well at home as it does at work. Doesn’t matter where I am.” (Senior Associate Lecturer)

Activity: Meeting and interacting through virtual multi-user environments	
Multi-user virtual environment	
Tools used	Second Life
Reflections	<p>“I’ve got a grant to look into using Web 2 tools to enhance student learning. I’m going to set up blogs and wikis and Second Life. I’m particularly anxious to follow through the Second Life experience of several groups including people who are taking the course as a CPD from within the pharmaceutical industry. They are going to struggle with firewalls, we know they have firewalls from their problems accessing other systems.” (Senior Associate Lecturer)</p>

Activity: Contributing to and Reading an Online Journal/News	
A daily or regular online posting with news and information, sometimes with reader contributions	
Tools used	blogs
Reflections	“They are only as good as those who use and contribute regularly”. (Manager)
	“I read blogs a lot, use as a source of information, and a source of contacts. If someone has responded to a question they might be a useful contact I didn’t know about. I’m happy to be a lurker, not felt the need to post.” (Senior Associate Lecturer)
Examples of blogs	<p>blogger.com</p> <p>blogspot.com</p> <p>wordpress.com</p> <p>sixapart.com</p>
Other related tools	<p>newsgator.com</p> <p>bloglines.com</p> <p>reader.google.com</p> <p>turtilla.com</p>

Activity: Establishing and Maintaining Networks and Contacts	
	Membership websites for linking together people with shared interests
Tools used	facebook.com www.ginn.com CORDIS
Reflections	“Someone developed an idea for using Facebook for networking, but Facebook is blocked by firewalls at many of the partners, so it was easier to do it just by email” (Project Development Manager)
	“We use the CORDIS facilities – to work with European universities. You can post your profile, and if they need other partners they can search for people with the relevant expertise.” (Senior Research Fellow)
	“Extranets and networking through social websites sound interesting but I don’t think we’ve used these to their full potential because in reality people are just kept busy battling with their email inbox.” (Head of Knowledge Transfer and Business Partnerships)
Other professional networking examples	
	linkedin.com
	eduspaces.net
	ryze.com
	network.nature.com
	www.innocentive.com
	www.i10.org.uk
	www.bioknex.org/Network
	www.startupcommunity.co.uk
Other social networking examples	
	myspace.com
	bebo.com
	friendsreunited.co.uk
	friendster.com

Activity: Sharing resources/bookmarks	
Capturing and storing a set of useful addresses to share with others	
Examples of tools available	www.google.com/bookmarks
	www.furl.net
	www.citeulike.org
	www.connotea.org
	del.icio.us
Activity: Conducting Questionnaires/Surveys	
User created surveys, polls and voting	
Examples of tools available	surveymonkey.com
	polldaddy.com
Activity: Sharing Specialist Content	
Sharing of multimedia files and other specialist content	
Examples:	
Online newsletters	letterpop.com
Mindmaps	bubbl.us
Customised maps	maps.google.com
Shared images	flickr.com
	phlog.net
Video	youtube.com
Activity: Sharing Tasks/To Do lists	
To do lists, sticky notes, alerts	
Tools available	rememberthemik.com
	30boxes.com
	tadalist.com
	forlater.net
	google.com/alerts
	www.stikkit.com/
Logging your time	toggl.com

Further Reflections	
Reflections on Face to face versus collaborative tools	
	<p>“there has to be a degree of face to face activity initially, to set up a working relationship”. (Business Development Officer)</p> <p>“face to face meetings are important at the outset of a collaboration and to finalise certain milestones/negotiations”</p> <p>“It’s always easier and nicer to work with people you’ve met, nothing else comes close.” (Project Development Manager)</p> <p>"Collaborations work when the physical and digital go hand-in-hand,". "It's really important to have a common, physical reference point." (Head of Research Development Services)</p> <p>“We went through a tendering process remotely, but the kick off meeting was face to face to get to know one another. We only had 3 further face to face events in the remaining 18mots. All of our weekly project management meetings are online.” (Manager)</p> <p>"It's important to meet people, to avoid misunderstandings." (Head of Research Development Services)</p> <p>“No technology can beat the mind and capacity of humans in making connections and links. The network is mainly about the individuals, the person making meaningful connections.” (Research Exchange Manager)</p>
Reflections on technical and institutional challenges	
	<p>Would welcome “more support from IT dept with regards to new web tools and their installation”. (Business Development Officer)</p> <p>“It’s amazing how many systems we have to be within the University to use. Because this one is hosted outside, we can all use it externally.” (Director)</p> <p>“Large institutions are very security conscious, which limits the use of some tools” (Business Development Officer)</p>
General reflections	
	<p>“If there were one set best practice tool, it would become ingrained as the way to do it. So many different tools are available now. It’s getting harder with more new tools becoming available.” (Project Development Manager)</p>

	“Choose the lowest common denominator. Go for the simplest option, everyone has it and knows how to use it”. (Project Development Manager)
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