

SHARING KNOWLEDGE AND BUILDING COMMUNITIES  
A NARRATIVE OF THE FORMATION, DEVELOPMENT  
AND SUSTAINABILITY OF OOPS

Meng-Fen Grace Lin

May 2006



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SHARING KNOWLEDGE AND BUILDING COMMUNITIES  
A NARRATIVE OF THE FORMATION, DEVELOPMENT  
AND SUSTAINABILITY OF OOPS

A Dissertation Presented to the  
Faculty of the College of Education  
University of Houston

In Partial Fulfillment  
Of the Requirements for the Degree

Doctor of Education

by

Meng-Fen Grace Lin

May 2006

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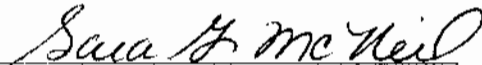
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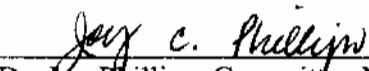
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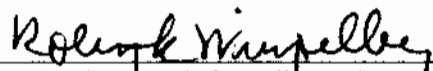
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I dedicate this dissertation to all the volunteers worldwide, people who are generously giving of their time, strength and expertise in support of a wonderfully wide range of projects designed and implemented with the intent of improving the quality of life for human beings everywhere.

Together, we can make a difference.

## ACKNOWLEDGEMENT

As is true of almost any undertaking of a pioneering nature - a project that explores still-emerging human knowledge, technology, world views, and, hence, complex human interactions - this dissertation could not have been completed without the support and encouragement of many special people.

From its inception as a half-formed idea fluttering about in my brain, this project has demanded that I have the courage of my convictions. Thus, I think first of my very special family - my mother, sister, grandfather, aunt and uncle - who have during all my life, applauded my accomplishments, and steadfastly reminded me of how “far I have come” and, “how far I can surely expect to go.” They have been devoted and invaluable “cheerleaders” ever urging me upward and onward.

The people most closely involved in shaping and completing the “final product,” the dissertation itself, of course come to mind. My advisor, Dr. Sara McNeil, has played a crucial role in my professional growth and development. From the beginning of our very happy and productive association, she took me under her wing and, over the years, afforded me many professional opportunities that I could not have otherwise enjoyed. From her I have gained a strong sense of direction along with confidence in my ability to perform meaningfully and successfully within my chosen field. My dissertation co-chair and methodologist, Dr. Cheryl Craig, has proved invaluable in her insightful and distinctively unique direction of my project. She found ways of allowing me great creative freedom, both in formulating ideas and theories and in the format in which I felt these were best presented, while at the same time providing a carefully structured intellectual environment which was conducive to my successful completion of the project. Dr. Craig helped me stretch my abilities to their limits under the guidance of her high standards, all the while challenging me to think independently and innovatively. My mentor, Dr. Mimi Lee, with whom I have co-authored a book chapter, has demonstrated her respect for and enthusiasm in my research with her never-ending research ideas. Another committee member, Dr. Joy Phillips, has from the beginning of my association with her given me positive support and encouragement. I am indeed grateful for the help and input of all of my dissertation committee members.

Nor would I be so ungrateful as to forget that there have been many highly significant mentors who have influenced my life and the work I am doing. There was Dr. Hersh Waxman. I was introduced to research in his challenging courses; my Internship with him broadened my research experience. Dr. Lee Mountain was instrumental in my job search process and an inspiration to my writing and publishing. And Dr. Curt Bonk from Indiana University took a profound interest in my research and made my research journey extra joyful.

All of the foregoing are special people who have touched my life in meaningful ways and who have, each in his or her particular role, contributed to the work I have been able to accomplish. But I feel my heart swell in my chest as I call attention to the final group of people to whom I owe my deep appreciation and respect - my research participants: Arnold, Doris, Filestorm, Jessie and Luc. As I have said, this dissertation began as a half-formed idea, a hazy notion that I toyed with; it was through my interactions with these participants that I came to formulate a concrete and beneficial approach to knowledge sharing in a new and exciting venue. These people gave me not only their time but their unique experience, which, truly, form the base of this research.

I want to acknowledge my many fellow graduate students, all the students and teachers at the Bodhi Chinese School - and all the beautiful minds around me.

Thank you.

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### Abstract

This narrative inquiry (Clandinin & Connelly, 2000) documented the formation, development, and sustainability of an online community called OOPS (Opensource Opencourseware Prototype System) originally formed in February 2004 to translate the MIT OpenCourseware project into Chinese. This community is unique in that it is comprised of over 1,800 online volunteers from around the world and has coalesced rapidly into a distinct group of people that share a common goal, interact frequently with one another online, and communicate mainly through a web-based forum.

Little is known about how this type of community is formed and evolves, how participants learn from and interact with one another, and how volunteerism is nurtured and supported. As a participant in the OOPS project myself, I became intrigued with the formation of this community and the experiences of its members. Using interviews with participants, archived discussions from the online forum, and observations, as well as my own understanding and knowledge, I explored how the OOPS community formed values and created a social structure. In this research study, I have described how our experiences were shaped by social interactions, individual beliefs, values, and assumptions.

This inquiry involved two different ways of viewing the community through micro-stories, the individual stories of participants, and macro-stories, stories that involve the community as a whole. Each viewpoint has a different framework for analysis.

Using the concepts of narrative authority (Olson, 1995) and knowledge community (Craig, 1995a, 1995b) as the first analytical framework, I drew on the micro-stories of this community's members to unpack various motivations, satisfactions, and hazards involving volunteer work, the forming of knowledge communities, and the expression of individual narrative authority. In the process, I discovered a phenomenon I have called "experience asymmetry" that exists when people have diverse experiences resulting in different and, at times, competing understandings. I further explored the interaction between experience asymmetry and narrative authority as they are expressed in a knowledge community. I have also expanded the current literature on knowledge community to include the online characteristics of human interactions, and I argue for a modification to also consider the notion of safeness, time, identity, and fluidity of boundary.

Using Wikipedia and models for open source development as the second analytical framework, I drew on the macro-stories of the community to understand events that bridge both the online and offline lives of the participants. Often these activities produce a friction that, while stressful, has the potential to create a synergy that increases dialogue and interactions. I have classified these frictions in four categories related to knowledge development, leadership and decision making, community structure, and usefulness and intellectual property. In this process, I have explored why participants take on additional tasks that have more complexity and more involvement as a way to sustain their commitment to the community.

Based on my inquiry into both the micro- and macro-stories, I have suggested five ways to sustain an online community through an environment that: (1) encourages

increased responsibility and commitment of the members; (2) provides technology as part of the solution; (3) distributes leadership; (4) encourages use by people outside the community; and (5) gives back to the worldwide community through creating new knowledge.

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## CHAPTER ONE: NARRATIVE OF THE RESEARCHER

“The right time, the right place and the right people” (天時，地利，人和) is an old Chinese saying articulating the importance of being at the right place with the right people at the perfect timing to facilitate success. While this concept could be widely used in various contexts, ranging from cross-country politics, business negotiation to personal promotion, it certainly is applicable to how I first became a volunteer translator for the project called Opensource OpenCourseware Prototype System (OOPS).

I became an OOPS volunteer translator on June 16<sup>th</sup>, 2004. Due to an unexpected event during my summer visit to Taiwan, my home country, I had to stay for two extra weeks. During this unexpected break, I received an email describing OOPS. “Perfect timing,” I remember thinking to myself. It was an ideal opportunity for me to do something meaningful during this fortuitous time frame. Therefore, I decided to volunteer to translate one of the courses. This initial impetus to participate led me into uncharted territory: becoming a member of an online community that was completely unknown to me, a series of encounters that ultimately developed into my research interest.

### My Journey into OOPS

I came to know about MIT OpenCourseware (OCW) when they first launched 500 courses in September 2003. OCW was MIT’s attempt to make knowledge more available to learners around the world (Gilbert & Long, 2002). OOPS, on the other hand, is a grassroots regional effort to translate and adapt these shared materials into the Chinese language, thus making them accessible to one of the world’s largest populations (1,300 million people or roughly 31% of the world population, according to the

Publication Reference Bureau). When I visited the OOPS web site, it was love at first sight - the entire content is in Chinese. I could read Chinese much faster than English because it was my first language! Browsing through all the variety of courses made me want to read them all. This combination promoted my journey into OOPS.

### *Becoming Involved*

I spent the next day browsing through the site, looking for courses in which I was interested. Certain drawbacks presented themselves. On one hand, I felt that the most “interesting” courses were already claimed by other volunteers. I experienced the feeling of being there too late, the feeling of arriving in the midst of an “ongoing story” (Clandinin & Connelly, 2000). On the other hand, I was uncertain as to whether I was capable of doing the translation. I was confident my English is more than adequate since I have been living in the United States for many years. I believed that this firsthand experience with speaking, reading and writing should give me the advantage of a certain level of competency of the English language; I should have no problem understanding the materials. In addition, Chinese is my native language; if I do not qualify, then who does? However, translation? Me? This was a challenge I had never taken before. Thus, I was initially indecisive: I wanted to tackle the project so I could put myself through this interesting challenge and see what I could accomplish, but I was apprehensive about my qualifications.

OOPS has an open-door policy where everyone who wanted to volunteer would be granted the opportunity. OOPS does not screen for “qualifications”; rather it asks for commitment. If it were not for this open door policy, I probably would never have gotten

involved. Of course, immediately after I started translating, I realized translation is much harder than I had anticipated. There was much I had to learn along the way.

For example, one thing I quickly learned was that my Chinese was not as adequate as I imagined. I did not know all the proper technical terms in Chinese, and it was very hard to come up with the correct Chinese words when I have become accustomed to think in English. All of a sudden, the English ability I was so very proud of became hindrance, baggage to a certain extent. In addition, I also battled with Chinese keyboarding, something I rarely do, and therefore I worked very slowly, resulting in extremely unproductive progress in the translation. Several questions arose during this initial stage of my involvement with OOPS. Who had this noble idea of using volunteers? What were their goals and motivations in starting OOPS? Why did OOPS decide to take on the “open door” policy and what were some of the criticisms about this policy?

### *Becoming Scared*

While I was still in Taiwan, I relied heavily on my sister and my mother to help with the Chinese part of the translation. I explained to them what I wanted to say, and they helped me come up with proper words, phrases, and expressions. My mother was helping me with the Chinese input, too. I wrote on a piece of paper, and she typed what I wrote into the computer. I actually finished the first level translation in fairly good time, even though it took much longer than I had anticipated. When I saw the finished work online, I experienced a sense of accomplishment. However, when I saw my name and my mother’s name also on the site, a real sense of responsibility came to the fore. What had I got myself into and what had I got my mother into? Once more, a number of significant questions about the program came forward. How do volunteers make sense of their

translation experience? How do volunteers seek help with their translation questions? How do volunteers respond when seeing their work online? How does this response shape their OOPS experience?

### *Becoming Inspired*

Even though the translation was difficult, I experienced comfort and encouragement through my visits to an online discussion board that was set up to provide a forum for volunteers and users to come together online. I observed the discussion for a while and saw how fellow volunteers sought help, and provided help to each other. Even though translation was a difficult task for me, I discovered I was not alone and help was available to me. I was utterly impressed with the pool of talents exhibited on the forum. This reminded me of an old Chinese saying, “Crouching Tigers Hidden Dragons” (臥虎藏龍). Tigers and dragons here represent people with power and talents. This metaphor means that we may not realize the existence of those talented people among us, just like the crouching tigers and hidden dragons--but just as the tigers and dragons jump out of the bushes unexpectedly, these talents will come to our rescue when needed. This metaphor expresses the diverse powers and talents distributed among people and also the distribution of knowledge among ingenious individuals. The Internet makes the sharing of these talents and knowledge much easier. Witnessing these “hidden” talents among those in the Internet jungle made me realize how powerful collective intelligence could be.

For a very long time, I was an observer, a lurker in online language, who read postings, but did not post or respond. As a lurker, I was entirely captivated by the fluid interactivity, highly intellectual exchanges and sometimes heated debates that occurred in

online discussion. I was also fascinated by the people, their stories, the experiences and the dialogues that occurred in this entirely asynchronous online space.

An excellent example was a question about a political science course posted by a translator who asked, “Does the absence of organized institutions of tax and transfer at the international level make any difference to the proper norms of justice at the international level?” The debates focused on the term “organized institutions.” Does it simply mean “organizations” or “systems/mechanisms?” The debate went on for about a week, and both sides stayed firm with what they believed. One of the volunteers, Jessie, who was not even the translator of the course, actually took the initiative and contacted the MIT professor who wrote the course for clarification. She said, “I am determined to get to the bottom of this.” Surprisingly, she received a speedy response from this professor; it turned out that what the professor meant was “organization.” Yet, a good answer to the question could be that without the systems/mechanisms consensus, there will be no proper norms of justice. It was very intriguing to see the debate process unfold and hear the professor’s immediate personal response. As a lurker, I witnessed an authentic learning process in which everyone who participated benefited. If this is not learning, what is? This thinking, in turn, gave rise to more questions, some of which echo the literature: Who are these people? Why do they volunteer? How do volunteers’ participation and non-participation in the online forum shape their experience in OOPS? How do volunteers perceive the online forum as a way to collaborate in solving their problems or helping others solve theirs? Has their way of dealing with problems

changed? If so, in what way? \*<sup>1</sup> How do volunteers feel their participation in the forum has increased their knowledge? To what degree are they better able to apply this knowledge to solve a problem, for example? \* To what extent are volunteers willing to discuss issues that are important to them with others in the forum? How important is being able to enter such discussions to them? \* To what degree do the things they read in the forum inspire them? Do certain threads lead them to read a book or gather more information on a certain topic? \*

Another example also demonstrated the energy and creativity exhibited in OOPS. My all-time favorite example was this, “Oh no, I have an exam tomorrow, and it is very impotent for my grades!” This was from a course about psychology and unconsciousness. There was a pun – word play with the word impotent and important. How do you translate an English pun and maintain the same sense of word play when the pun is translated into Chinese? Reading through those postings was entertaining as well because fellow volunteers developed many creative ideas. People in my office were used to me staring at my computer and sometimes laughing uncontrollably. Reading through postings such as these was also an humbling experience: every time you think one answer is good enough, someone will offer another one that is even better. I was inspired by the collective talents and colorful engagements in OOPS. When I told my American friends what I had witnessed and experienced, they enjoyed my storytelling of this “foreign” place and were equally captivated by how the ongoing stories unfold in OOPS.

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<sup>1</sup> All questions indicated with an asterisk (\*) are adapted from Spa, M. (2004). Cyber-communities: idle talk or inspirational interaction? *Education Technology Research*, 52(2), 91-105.

### *Becoming Personal*

When I first joined the project, I observed the online interactions and tried to figure out the “climate” of this cyber space. How do people talk and interact with one another and the group as a whole? I quickly learned that people tended to talk informally, and comments were usually short. Emotion icons were used often, as was slang that pertained to the young adult generation. The members interacted frequently, creating a sense of “being in a crowd” and a welcoming environment for a newcomer like myself. The primary language used in the forum was Chinese, with a few exceptions from several members. During this period when I intensively observed the social interaction online, I noticed a change in my own “online behavior.” For example, one thing I decided to do was to talk “more like them” by using more emotion icons and young-adult slang. I also noticed my struggle with word choice as I attempted to “fit in.”

How would my experiences with the OOPS context and my efforts to fit in have been different if OOPS were not online? How would my coming to know about OOPS context has been different if OOPS were not online? More questions around this puzzle surrounded me during this time. How do people “figure it out”? How do people decide how to interact online? Why would someone choose to use English in a posting when the majority of participants use Chinese? How has the forum encouraged volunteers to be more critical, to demand arguments before they believe what is said, to engage in research or to seek argument to support their own opinion? \*

I was a contented member for a while until a stranger disturbed my peaceful journey. The first time I was confronted by this person’s comments was when I posted several translation questions on the forum. An anonymous person posted a partial answer

and continued by criticizing me for not doing thorough research before asking my questions. When I saw the criticism, I felt I had been attacked and I was very angry. I was upset at this person's crudeness. At the same time, I was angry at myself for not conducting better research.

This kind of direct criticism was not uncommon on the forum. It was partially because of these kinds of frank remarks that inspired me to regard this forum as a place for open debate and exchange. Yet when the criticism was directed toward me, I could not help but take it personally. As odd as it sounds, I felt a sense of "losing face" in this "public place" even though nobody really knew who I was. Indeed, "Words on a screen can hurt people" (Rheingold, 2000, p.24). I also felt the "peer pressure" to do a better job. To my relief, several other people came to my defense, observing the fact that we were all amateur translators, after all. Those defenders were important for me because they showed me, at a very personal level, that I was not alone in this rather complex situation.

After resisting the urge to counter attack, I developed a heightened awareness of a need to be even more polite on the forum. I have observed that attackers were usually unwelcome and people did defend others against the attackers. I also felt compelled to do more searching and researching before I asked any more questions on the forum. It was also during this time that I became aware of the high percentage of users using anonymous logins to post questions. This triggered another set of issues that required research. I started pondering how people perceive themselves and others through online interaction. How have volunteers' ways of thinking or acting changed through their participation in OOPS? \* Why do people choose to participate in an online community anonymously?



### *Becoming Serious*

Participants who interacted in the online forum sometimes disagreed with each other, and consequently there would be extended debates on issues that would last for several weeks. Impressively, the responses usually involved higher order thinking-- analyzing, connecting and evaluating. On occasion, the collaborative knowledge construction involved a little “yelling” too. It was fascinating to see “strangers” voluntarily spend time debating on issues about which they felt so strongly, when they could easily have “walked away.”

Reading those online postings kept me engaged in self-reflection and questioning. OOPS was my first experience involving a group of people whom I did not know. Maybe these exchanges were part of the reasons why OOPS members had chosen to stay together, instead of dissolving as time passed. My curiosity about how people interact online and how they experience knowledge construction led to the crafting of further questions. What are participants’ beliefs about truth and knowledge? How has their view changed through their participation in OOPS? What kind of interaction patterns are exhibited in this community? How do people come to agreement on issues or questions? How is the respect of pluralism of opinions nurtured and exhibited? How has knowledge been socially constructed in this space?

On the discussion board, I saw many talented people who were willing to help each other. Confucius said, “Among three walking people, at least one will be able to teach you something” (三人行必有我師) and that is very relevant to this forum.

However, through debates, I also witnessed how people would agonize and debate over one word. That was when I really started to question whether I could hold myself up to

that kind of high standard. I was impressed at how much effort volunteers spent agonizing over every single word. Could I do the same? What happened if I made a mistake and a learner from somewhere in the world came along, read it and was misled? Who is responsible for these kinds of educational, social, and moral consequences? Oh, what have I gotten myself into? During this period, new questions involving quality and volunteer responsibility interested me. What is quality? Who qualifies and who should decide? How do volunteers perceive their role in OOPS? How do volunteers perceive the role of OOPS in the society? How do they come to that understanding? How does participating in the online forum shape that understanding?

I began to ponder the possibility of pursuing my interest in OOPS as a research inquiry. During that time, I talked for the first time to Luc Chu, the OOPS founder, about co-authoring a conference proposal. My prior unsuccessful dissertation research attempt taught me one precious lesson: become involved and get your participants involved, from the beginning. I wanted to establish some “relationship” with my research participants, even in a computer-mediated setting. However, Luc was different. Luc said, “Hi” after the Voice-over-IP connection was established. Before I could say anything, Luc asked, “What is your progress right now?” I thought to myself, “Don’t we need to warm up first?” Luc’s directness and business-like distance startled me a little and alienated me as well. Like Luc, I usually tend to get right down to business. Who has time to beat around the bush? However, maybe because of the lack of facial cues in a computer-mediated communication, Luc’s directness was too impersonal for me to be able to start a first conversation this way. Nevertheless, I quickly put away my thoughts and engaged myself in the conversation.

Grace: Information overflow. Still trying to sort out all the information you sent me and all the information available on the web.

Luc: I told you we have a lot of information...

I interrupted him and said “before we continue, I would like to give you an opportunity to ask me any question you might have about me...”

Luc: Not necessary. I trust that everyone who is willing to donate their free time is doing so in a spirit of good will. Everything you do, I believe, will only be beneficial to our project.

My first encounter with Luc stirred a sense of anxiety in me that, in time, formed a chain of worries and questions about how I would conduct any future research with him. Shortly before this first conversation, I discovered Luc was a celebrity in Taiwan, and that information created mixed feelings on my part. Mainly, I questioned if I could ever be on equal footing with him; all my life, I have not known anybody who is famous. In my mind, being a celebrity carries some connotation of a prestigious place in the society. Inherently, with that belief, I felt I was just a “nobody” talking to “somebody.” On the other hand, it was pretty exciting to get to know a celebrity in such a way. I was able to Instant Message (IM) him when I saw that he was online, and he initiated conversations online from time to time, too. After all, not that many people could have such a “close” relationship with a celebrity. The experience of working with Luc was very unusual, to say the least.

During the next several days, we exchanged twelve versions of the proposal and at the same time I tried to figure out his working style and willingness to work with me. I was utterly impressed with his responsiveness during these revisions. However, I also realized that his motivation to work with me was largely due to his intrinsic motivation to write the proposal, which would have the ultimate result of disseminating OOPS into the

international community. I liked what I found out about his motivation to work with me; I was able to take advantage of his motivation and gained access to him via this channel. In addition, his business-like demeanor and task-oriented motivation allowed me to respect him as the leader of OOPS. It was conceivable that, as a celebrity, he might be concerned about people “coming” to him too quickly and closely. More questions surfaced in my mind after these initial contacts with Luc: Why does Luc have such a utopian faith in people’s good will? What kind of past history creates Luc’s peculiar behavior toward interviewers? How does Luc’s celebrity status influence people’s perception about OOPS? How does Luc use his celebrity status to the advantage of OOPS?

During our co-authoring experience, I wrote in English, and he wrote in Chinese. One of the most interesting things that emerged during this period was Luc’s concept of “education.” In version eight of this revision process, I proposed the paper title “OOPS! Education for Everyone.” Luc strongly disagreed with me. He said point-blank that my proposed title was “inappropriate,” and he continued to claim: “Our project is dealing with knowledge, not education. Don’t forget, we do not yet have any teaching involved.” Luc’s disagreement about the title of our paper challenged me to think about the relationship between OOPS and education. Luc seemed to see teaching as fundamental to education. I, on the other hand, saw OOPS as an educational movement even without the so-called formal teaching. I replied to him in version ten:

Interesting. I guess it is a matter of seeing the issue from a different perspective. It sounds to me as if you view “education” as requiring that someone (e.g. teacher) be doing the teaching. I consider self learning also “education” – the kind of self learning that is happening with the translators seeking help from each other, and the volunteers debating over the issue of quality, etc. I even think the materials we are translating are just “information,” not “knowledge.” It is the meaning-making process that could transform information into knowledge

In version eleven, Luc offered his suggested title, “OOPS! A Free Model for Open Knowledge,” and again offered his view regarding OOPS as relating to knowledge but not education.

Nope, I agree with what MIT said. What OCW provides is knowledge, not education. An MIT education should include the interactions among the teachers, the students, the teaching assistants, and school environment. The interactions among our volunteers constitute learning, but not education, which has the teacher-student hierarchy.

It was interesting to note that Luc saw education with the inherent teacher-student relationship and that was where he distinguished OOPS from education. Luc viewed OOPS as a peer-to-peer learning environment that was different from the traditional view of education. I still believed OOPS related to the concept of education. At this point, more questions bubbled to the surface. What is knowledge? What is education? Specifically, what do learners conceive the role of the teachers to be? How will Luc and I influence each others’ beliefs and assumptions during our partnership in OOPS and my research?

### *Becoming Focused*

One of the most fascinating experiences in the project was to observe the activities on the discussion board. If the question about quality drew me into this project, the dynamic exchange on the discussion board definitely kept me engaged. My first motivation to browse past postings was to become familiar with what had been going on with the project. The more I read these postings, the more intrigued I became. One of the best examples was one of the first debates on the issue of quality.

This debate started on May 7<sup>th</sup>, 2004, and was prompted by the observations of an anonymous user. This person praised the spirit of this project, yet raised the question about quality control of the translated materials.

Anonymous1: wrong knowledge is worse than no knowledge

Luc: All web pages are published with both the original English and the translated Chinese...All readers are proofreaders...For us, there will never be a finalized version. Everything is forever up for discussion, and modification.

Luc, the project initiator, was the first one to answer this thread and openly offered his vision about this ever-debatable issue about quality. Luc was both persistent and consistent in his view about quality. He believed in a democratic process where everyone had an equal right to contribute as well as to dispute the translation. From the beginning, he wanted to set up a wiki system, a web-based platform that allows collaboration among users to co-create web documents. He believed that everyone can be a collaborator and a contributor to the translation quality. Rather than be a critic of the materials, everyone can choose to be part of the process.

The discussion of the quality issue continued, and the only perceivable agreement was that there was no agreement. For the quality advocate, knowledge is a serious business. They would rather go about the task slowly, with several iterations of editing, before the final release to the general public. Others wanted to capitalize on the collective efforts, using multiple eyes and talents as a way of quality control. They believed the materials should be placed online, where the readers will be the best quality critics, an idea similar to Wikipedia ([wikipedia.org](http://wikipedia.org)) in that nothing is ever finished and everyone can be part of the process.

Luc posted his reply about quality in May, 2004, before I joined OOPS. When I spoke to him in August, 2004, he was in the midst of establishing a review board. This was a panel of experts in the field who would serve as the “quality control.” They would do the final review for content appropriateness after the editor has smoothed out the grammar and syntax before the material is put online. In that conversation, he admitted that quality and usefulness were the two biggest criticisms OOPS had received. He believed, “The establishment of the review board will avoid some of the questions about quality.” I think in facing the public opinion, Luc was flexible enough to establish the review board in response to the quality criticism.

Reading those debates and following the evolution of OOPS really spurred me to re-think my motivations, and to re-examine my role and ability. Not only did the work fascinate me, it addressed communal, self-learning in virtual communities where much activity is taking place but about which little is known. OOPS made a good story just by its innovative and creative approach to open knowledge. My personal OOPS stories and experiences, and ones I witnessed online inspired more discussions among my colleagues. This was the turning point where my fascination with OOPS made a transition into a research topic.

### Research Question

I encountered OOPS at the most unexpected time. That timing brought me into cyberspace where a group of strangers worked together on a shared goal. The old Chinese saying, “The right time, the right place and the right people” placed me in the center of the inquiry. My experiential knowledge about OOPS enabled me to connect my volunteer work in OOPS with my research. Such a tight link is important for me because I believe

personal-interest driven research enables better potential to develop longer and deeper inquiries.

My unanticipated journey into OOPS exemplified what Dewey called an “educative” experience (Dewey, 1938), an experience that is individually continuous and socially interactive. Not only did my journey combine past and present life experiences, it had the potential to shape my future experiences. Most importantly, my experience was created and shaped by interacting with others online. When I went through stages of involvement, various questions entered my mind. My thinking, understanding, and behavior, in turn, were influenced by the social online environment. The continuity and interaction of my online and offline experience, my in and out of OOPS interactions with others created the center stage of my inquiry.

Seeing talented Chinese people from all over the world coming together in this cyber-community stirred up my curiosity: who are we and why are we doing this? Being involved in an online community with people I did not know was an exciting adventure that I had never experienced before. My attempts to “fit in,” to “be like them” in this community, and my evolution from being inspired, to being personal, and to getting serious created my journey into this community, as well as the motivation for this research. In OOPS, I witnessed the peer-to-peer interactions that had sparked knowledge creation. How do participants experience such social construction of knowledge in a virtual space? How does computer-mediated communication facilitate such learning? I envisioned OOPS as a social structure that created knowledge and value for the people involved and for the larger society. How do participants’ experience in this form of value creation and social structure link to our prior learning experiences? How are volunteers’



OOPS experiences shaped by their perceived social interaction and their personal beliefs, values, and assumptions? More importantly, how does the community experience stress from within and from outside? How does OOPS react to those stresses and therefore become shaped by the consequences? Can OOPS survive for the long run? Will OOPS accomplish what it set out to do? How can we keep our commitment to a voluntary work when departure is always an option?

My sense of inquiry led my research and my research questions evolved into:  
How has OOPS, an example of an online community, been formed, evolved, and sustained as its members experienced both tensions and learning in the process?

## CHAPTER TWO: NARRATIVE OF THE RESEARCH CONTEXT

### Setting the Stage

Thomas Friedman in his 2005 book, *The World is Flat*, talks about ten forces that have flattened the world in terms of globalization. The word “flat” acts as a metaphor to symbolize the “leveled” playing field at a global scale. In Friedman’s (2005) view, when the playing field is leveled, everyone can take part. And he means *everyone*! Talking from a business perspective, Friedman charts the progress of globalization from what he describes as 1.0 to 3.0. Globalization 1.0 focused on country to country relationships, such as treaties and trade. In Globalization 2.0, the relationships moved down to a company-to-company level. We are now at the age of Globalization 3.0 where the rise of the individual comes into focus. Friedman gives examples from the open-source movement such as Linux, where the collective of individuals, working in a community of programmers, could make a difference in the field of computers’ operation systems. In this stage, the world is really flattened where people like you and I can make a difference at a global scale.

But how could an individual act have global consequences? Just like many programmers who help write the Linux codes, by working with many others, we aggregate individual acts to something larger than what one person can accomplish. In other words, for individual acts to have profound consequence, we collaborate with others in a community. The whole is greater than the sum of the parts. In Globalization 3.0, the innovation and imagination of individuals could provide certain shake ups that might challenge the status quo and could lead to opportunities. The rise of the Internet and the wide spread of Information and Communication Technology (ICT) enable many

of the shake ups and the formation of global grassroots community efforts. There are many benefits as well as drawbacks connected to the rise of the Internet and the manner in which ICT has impacted the way we live, do business, seek entertainment, communicate with one another, and learn. One thing is for sure: we have progressed from the transfer of physical products to the moving of bits and bytes at lightening speed. One of the most unequivocal benefits of the Internet as a speedy media for transmission is the ability for everyone to share and disseminate knowledge more quickly, freely, and globally. Open Educational Resources (OER) provides one such example of an innovative use of technology to help the proliferation of free knowledge.

#### The Rise of Open Educational Resources

The term Open Educational Resources (OER) was coined during UNESCO's 2002 Forum on the Impact of Open Courseware for Higher Education in Developing Countries (Johnstone, 2005). Out of that forum came the definition of OER as "the open provision of educational resources, enabled by information and communication technologies, for consultation, use and adaptation by a community of users for non-commercial purposes" (UNESCO, 2002, p. 23). To keep the history timeline straight, however, this forum was held long after MIT first announced its OpenCourseware (OCW) vision and concept in April 2001. MIT initiated its OCW project in order to make its course materials freely available to the world (Gilbert & Long, 2002). In MIT's view, OCW's mission is consistent with MIT's role as the leader in higher education because the "prompt and open dissemination of the results of M.I.T. research and the free exchange of information among scholars are essential to the fulfillment of MIT's obligations as an institution committed to excellence in education and research"

After MIT's announcement of its OCW, the Hewlett Foundations endowed MIT's initiative in June 2001. In September 2001, MIT released 50 pilot courses. Two years later, in September 2003, MIT official launched 500 courses to the world. Since then, MIT's OCW has brought worldwide attention to the OCW movement. For example, Utah State University (USU) launched its OCW in March, 2005, followed by Johns Hopkins Bloomberg School of Public Health (JHSPH) in April 2005. The success of OCW is apparent outside of the United States, as well. Six of Japan's top universities also announced their OCW in May, 2005. OCW seems to create a new trend in knowledge sharing and community building. However, the fact is that many similar initiatives had begun sharing knowledge before OCW.

For example, as early as 1997, Multimedia Educational Resources for Learning and Online Teaching (Merlot) started its learning objective repository project out of the California State University system. To date, Merlot has attracted many universities and community colleges, as well as corporate partners, and hosted over 13,000 learning objects, many of which are peer-reviewed. Rice University also has a digital publishing project called Connexions that started in 1999. Richard Baraniuk, who conceived the vision, began this project in an effort to overcome the time demanded in traditional publishing of course materials. Over the years, Connexions has grown into a comprehensive system with a set of tools for authoring, collaborating, building and sharing learning materials (Johnstone, 2005). However, there is no doubt that MIT OCW helped draw worldwide attention to the open movement and has since its inception inspired many OCW replications around the world. MIT reports that over 30 MIT OCW like projects have spun off all over the world (MIT, 2005).

The core spirit of OCW is sharing: the sharing of our intellect. When we share our intellect, we create diversity--the diversity of materials and viewpoints. Such diversity facilitated through the natural use of the Internet forms a web of people-powered open materials. In his speech at the Educause conference in August, 2005, MIT former president Charles Vest predicted a meta university as “a transcendent, accessible, empowering, dynamic, communally constructed framework of open materials” (Vest, 2005). Globalized e-learning users have much to gain from this world-wide collaboration, especially those from the developing countries.

However, until recently one small yet important issue has been overlooked in this OCW movement. Most of the OCW materials are in English, which according to CIA’s 2004 *World Factbook*, less than 5% of the world population considers as their first language (Central Intelligence Agency, 2004). Even though the number does not represent many others who consider English as their second or third language, the language barrier stands as one of many challenges in making free knowledge available to those in need. According to a recent survey conducted by the China Internet Network Information Center, only 9.3 percent of China’s Internet users visit English language web sites (2005). This finding is very similar to an earlier study that surveyed the Taiwanese Internet-use habits and concluded that language still “remains a significant barrier discouraging users from venturing out farther into the cyberworld” (Liu, Day, Sun, & Wang, 2002). The Opensource Opencourseware Prototype System (OOPS) rose out of the current OCW movement, with the mission to overcome the language barriers for the Chinese population.

## The Rise of OOPS

OOPS was started in February 2004 by Luc Chu and one of his close friends. To understand OOPS, we need first to turn our attention to Luc, the founder, pioneer, creator, and visionary. How did he envision OOPS and how were some early decisions made?

### *Luc: With Greater Power, Comes Greater Responsibility*

When I met Luc for the first time at a conference, he looked almost exactly the way I had seen in magazines and newspapers: shoulder-length hair, all-black attire, somewhat of a blend between cocky and imaginative. However, I was a little taken aback by his height: at six feet one, he was strikingly tall for an Asian. He handed me a business card with the title “Janitor” on it. I chuckled, “so you are OOPS’ janitor?” I asked. “Yea, I am a little person doing things for everyone,” Luc replied with a smile. This very tall “little person” had a way of making a big presence. For example, one morning at the conference, Luc interrupted one of the keynote speakers in the middle of the speech and loudly offered his opinion. Maybe it was his striking appearance, maybe it was his loud voice, but I noticed during the conference that when he spoke, people turned to him.

Best known for translating the *Lord of the Rings* into Chinese for both the books and the movies, Luc was the initiator and facilitator of OOPS. In his own words, he narrated his initial motivation to start such an ambitious project.

My initial motivation to translate the materials was very simple. I was inspired by an article that appeared in *Wired* in September 2003 about a college student in Vietnam who educated himself through MIT courses. I took a look at the web site and personally found it fascinating. I later introduced the web site in my TV program and a parent called and asked for the URL. That was the first time a parent called for the two months I had been with that TV program! I realized a lot of people just did not know about this valuable resource. I could not help but wonder if I had the chance to get to those materials when I was in college, maybe I wouldn’t

have needed to try three times to pass the required Electricity and Magnetism course.

I thought such a wonderful collection of materials needs to be translated into Chinese. However, a more qualified person such as a professor or an academic organization should head up such a project. Six months passed during which I mapped out how I envisioned a project like this could be executed and publicized. When I felt I could not wait any longer, I contacted my long-time friend, Mr. Yang, and we started the initial work. The web site was launched in February 2004.

Luc called himself “crazy enough” to start a project like this, but I think it may also be the kind of person he is that made launching the web site possible. He revealed briefly his life story in our first interview.

Even though I graduated from college with an Electrical Engineering degree, I have not used that degree for one day. I’ve done all kinds of work. In addition to serving as the chairman and director of Fantasy Foundation, I have been the general organizer of a publication company, TV producer, and consultant for a news channel on issues of internet and younger generation. I believe that during the infancy of OOPS, I have to maximize my influence in getting publicity and gaining support from the public.

Later in the same interview, Luc indicated again that “my diverse life experience affords me [the opportunity] to undertake a project in this scope.” Luc’s diverse life experiences were in fields with which I generally cannot connect. I do not know anyone in those fields and can only imagine what it is like to be Luc. Yet, I certainly could not have agreed more that Luc’s colorful experiences might have played to his advantage in the dissemination of the project. Nevertheless, Luc was very aware of the hidden danger of abusing his celebrity power. He continued, “right now it is just me and this actually makes things easier. What I say becomes an order; I don’t have to ask for permission from others. As the project progresses, however, we need others who are more qualified

to join and support. It cannot be my project; it needs to be our project.” Luc certainly came across as a person with confidence and vision. I was not surprised that he liked to be the boss but was almost relieved to know that he seemed humble enough to foresee his limitations and was willing to work with others.

As the Chinese translator of *The Lord of the Rings* and the founder of Fantasy Foundation, Luc has been a promoter since 2002; his stated purpose is “to promote fantasy arts in the Great China area, cultivate our own Tolkien and J.K. Rowling, and encourage the sharing of knowledge and thinking creatively.” For example, Fantasy Foundation has been engaged in activities such as annual fantasy art competitions and summer fantasy art camps, and has been hosting several online forums where fantasy arts fans and creators can interact and exchange ideas. His life story shaped his motivation and inspiration for creating OOPS. Even though it appeared he was concerned about his qualifications at the beginning, his diverse experience provided him the ability to start and spread the project.

During our first meeting at the conference, we co-presented OOPS to the audience. In one of his slides, Luc used the line from the movie *Spiderman*: “With greater powers comes greater responsibility.” This was his calling to the volunteers to assume our social responsibility. Luc’s view about the power of knowledge was revealed here. On one hand, he believed knowledge, as the source of power, could liberate mankind. On the other hand, the call to volunteers and the implied message that volunteers were the ones who possessed the power, set the hidden social hierarchy and privilege that some people have over others. “OOPS is a way for volunteers to give back to society what the society has provided for them,” he claimed, “it is a social movement.”



In addition, in order to “unpack” Luc’s initial motivation, we also need to pay attention to the underlying philosophies that Luc envisioned in order to understand this community. The information below was extracted from the progress report supplied by Luc.

### *Project Philosophy*

#### 1. Open and Sharing (開放、分享).

Luc, as introduced earlier, believed that through the translation project, volunteers not only gained content knowledge, they also played the role of facilitating the transfer of that knowledge into the Chinese community. By sharing, we construct even deeper knowledge. Such belief seemed to be compatible with Vygotsky’s social constructivist approach to knowledge creation. He also believed such a meaning-making process was the best reward for volunteer translators. This seemed to be the case. Fellow volunteers appeared to seek help and provided assistance for each other. The following example thread, initiated on September 2004, provided a demonstration of the validity of Luc’s conviction:

- |         |   |
|---------|---|
| Visitor | “The department of Mechanical Engineering has adopted the following guidelines for the grade distribution in undergraduate courses”<br>I don’t quite understand this sentence. Does it mean "採用機械工程系公佈的大學生課程考核標準"   |
| Jessie  | 機械工程系採用以下指標作為大學部課程成績的分佈。<br>Grade distribution informs people marking student work what percentage of student papers should be given a particular score. For example, you may have a rule that 10% of the papers will be given an A, 20% a B, 50% a C, and 20% should fail. This is based on the expectation that in any group of students there will be a normal or predictable distribution (常態或預期分佈) of abilities. |
| Visitor | Super thanks  |

- Visitor A 25% 、 B 40% 、 C 25% 、 D and F 10%  
How will grades be calculated?
- Visitor The course grade will be based upon the students' performance in the laboratories (30%), homework (20%), quizzes (25%), and final exam (25%). The department of Mechanical Engineering has adopted the following guidelines for the grade distribution in undergraduate courses: approximately 25% A, 40% B, 25% C, not more than 10% D and F. We will use this as a starting point in assigning grades.
- Jessie The guidelines indicate what percentage of students should be given a particular score. Basically students are ranked (排名次).
- In this case, those students who rank in the top 25%, will receive A, next 40% B, next 25% C, and  $\leq 10\%$  D and F. This is a guideline only. There is certainly leeway for the course instructor.
- Visitor Really?  
I have never seen this before.
- Luc Some professors in Taiwan do the same. You will receive 90 if you are in the first one-fourth of the class...
- Jessie This concept is based on the expectation that in any group of students there will be a normal distribution (常態分佈) of abilities.
- You can avoid the situation where students receive good grades in “easy” subjects, or on the other hand, students receive poor grades in “difficult” subjects. How one student performs is relative to the others in the same course.
- The system also overcomes the problems of different standards of marking. One marker may mark severely and another more generously. Papers randomly assigned to the first marker will be disadvantaged in comparison to papers assigned to the second. However, if each marker is expected to have a certain number of papers in each grade grouping, then the problem is overcome.
- Don't you agree that this is a fair way of assigning grades?

2. Paying back what the society has given us is our social responsibility (社會責任).

What each one of us is able to accomplish today is a direct result of collective resources from the society in which we function– the help and/or sacrifice of others. It is our moral and social responsibility to give back to that society at least a portion of what it has provided to us – the resources, knowledge and generosity. That is what the volunteers are doing.

When Luc and I presented at a conference, one of our catch phrases in introducing OOPS reads “The 2500-year old principles from Confucius ” (Confucius, circa 551-479 BC)

They hate to see resources lying idle,  
yet they do not necessarily keep them for themselves  
貨惡其棄於地也，不必藏於己  
They hate not to make use of their abilities,  
yet they do not necessarily work out of self-interest  
力惡其不出於身也，不必爲己

The culturally relevant concept we borrowed from Confucius implied the belief that OOPS was a unique social movement initiated by the elites, the ones with education and ability. During Confucius’s time, and throughout Chinese history, only the elites could bring pride and fame into their family by passing rigorous exams and serving the emperors. This excerpt was from Confucius’s belief in a commonwealth state, a utopia that was never realized. When I brought this to Luc’s attention, he replied, “OOPS is also a utopia. Many people did not believe that we can succeed.” I encountered such feedback among people I knew, too. For many, the idea of recruiting volunteers sounded off the wall. For others, the idea of translating all these materials into Chinese was simply

impossible. Later I had a chance to meet with a professor from MIT when attending his public talk in my city. He openly told me that he, too, did not believe OOPS would work. I asked him why, and he said he did not think there would be enough volunteers. Luc's view about OOPS being utopian might signify his ongoing challenges to the authority and the "impossible."

### 3. Helping the under-privileged is our obligated duty (濟弱扶傾).

OOPS was a must for people who otherwise could not afford this knowledge. We were promoting knowledge equality on a global scale, especially for developing countries. In one of Luc's PowerPoint presentation files he cited Alvin Toffler, the famous author of *The Third Wave*, who stated that "Knowledge is the most democratic source of power." I think what Luc meant by democratic power is developing countries' ability to change their destiny, a concept important to many Asians. By gaining access to knowledge otherwise too expensive, and breaking the language barriers, those countries will have a better chance to compete in the global economy.

#### *The OOPS Model*

OOPS used an "adoption" approach where volunteers can choose the courses they want to "adopt." On the web site, OOPS displayed an icon, immediately next to each course title, specifying the course's adoption status in four levels: (1) waiting to be adopted, (2) already adopted, (3) nearly finished, or (4) completed. Volunteers browsed through the project web site and looked for courses in which they were interested. They indicated the courses they wanted to translate via an online submission form.

OOPS divided all course contents into two levels. The level-one contents included standard components most courses share, consisting of a course home, syllabus, calendar,

readings, lecture notes and assignments. Some courses might have additional items such as study materials or exams. In short, the level-one contents included all HTML pages within each course. Level-two contents included PDF files with actual PowerPoint slides of lecture notes, class handouts, or exams.

Volunteer translators were required to translate the entire level-one contents first. The translated work will then be edited by an editor before volunteers proceed to the level-two contents. This process provided the editor with an early opportunity to catch possible errors and edit for styles. Once the translator accepted the editor's suggestions, the level-one content was sent to a reviewer (when available) before they were posted online. The reviewers consisted of content experts from different fields and they performed the final review for accuracy in technical terminology before the material was published online. The volunteers were encouraged to turn in the level-two contents in small portions due to their lengthy nature. The cyclical process then went on for each portion of the level-two work – editing, maybe reviewing, and publishing online. In other words, OOPS published level-one content online in its entirety while the level-two contents were posted in small portions. Figure 1 illustrates the process.

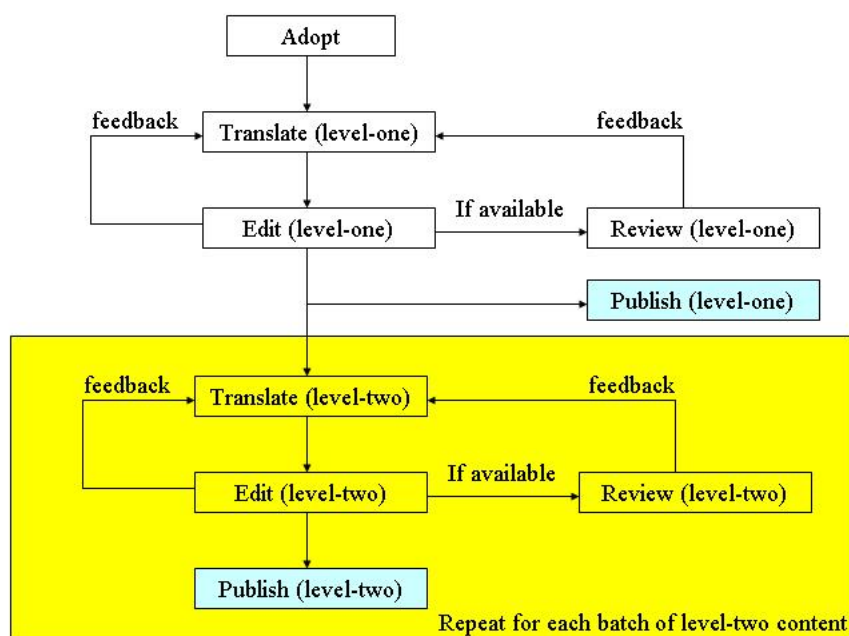


Figure 1. OOPS Publishing Workflow.

### *Overview of OOPS Volunteers*

As Luc publicly conveyed his beliefs about OOPS, they remained his beliefs. This personal agenda transformed into communal understanding with the growing numbers of volunteers. Luc’s initial decision to use volunteers was out of necessity. “Really it started out because there is no way I could possibly find enough people to do this. I had no choice.” One of Luc’s favorite sentences was “What money cannot do, do it with what money cannot buy.” I think what he meant by that was that even if you have lots of money, you cannot hire enough people to translate courses covering thirty-three disciplines. I believed this notion of “money cannot buy” also motivated and inspired a lot of volunteers.

At the writing of this report, OOPS had 724 registered volunteers who were translating 815 courses. Thirty-five courses had been completely translated. In terms of

geographical locations, OOPS volunteers came from fourteen countries and regions, with Taiwan (342) leading, followed by China (148) and the USA (33). Table 1 shows the distribution of OOPS volunteers by geographical locations. Since OOPS was based in Taiwan, it was logical that most of its volunteers are residents of Taiwan. However, with the help of the Internet, OOPS was able to cross these borders and reach into thirteen other countries/regions for its volunteer base.

Country/Region	Total (552)
Taiwan	342
China	148
U.S.A	33
U.K.	11
Canada	4
Australia	2
Brazil, France, Germany, Holland, Hong Kong, , Japan, Macau, New Zealand, Philippine, Singapore, South Africa, Vietnam	1

Table 1. Distribution of OOPS Volunteers by Region.

In terms of volunteers' highest degrees earned, 291 people with master's degrees accounted for the majority of the volunteers, followed by 224 people with bachelor's degrees. According to Selwyn and Gorard (2004), those who learn formally are also more likely to learn informally and involve information and communication technology. This might help explain why OOPS' volunteers were largely students and educators. Table 2 displays the distribution of volunteers' highest degrees earned. I was not surprised that most volunteers are students. This is consistent with my observation in the forum. Frequently people would refer to their professor, who had said so and so, or they would preface a detail with "I heard this from a classmate," etc. However, I was amazed by the

fact that OOPS had more volunteers holding advanced degrees (masters and above). Is it possible that those who have been given are ready to give?

OOPS volunteers were well educated, which implied two things. First, this probably reflects the value of education in the Chinese population in general. If people were generally well educated, OOPS will be able to draw upon this existing pool of talent. However, such a well-educated group might also exemplify the necessity of undergoing such a translation project. This second implication certainly could be a challenge to regions with lower educational levels-- regions where benefits from such open knowledge might be greater than in more privileged ones.

Highest Degrees Earned	Total (609)	Percentage (%)
Masters	291	48.0%
Bachelors	224	37.0%
Phd Candidate	54	9.0%
PhD	27	4.0%
Junior College	7	1.0%
Postdoc	4	0.7%
High School	2	0.3%

Table 2 Distribution of Volunteers' Highest Degree Earned

Table 3 lists volunteers' occupations. Interestingly, most volunteers were either students or in the field of education. A note of caution: The number reported here was based on the short biographies volunteers submitted through the online application form. Since not everyone provided this information, the report reflects only what could be collected. This explains why the numbers do not add up to the same total as in previous tables.



Occupational field	Total (459)	Percentage (%)
Student	224	49.0%
Education	70	15.0%
Software engineering	53	12.0%
Management and finance	28	6.0%
Publishing and translation	25	5.0%
Other	10	2.0%
Law	9	2.0%
Medical	8	2.0%
News, media, and entertainment	8	2.0%
Marketing	6	1.0%
Manufacturing	5	1.0%
Architecture	5	1.0%
Transportation	4	0.9%
Professional analyst	4	0.9%

Table 3. Volunteers' Occupations

Luc once posted on his personal blog his feeling about being part of the OOPS community. He said he had always liked the movie *Band of Brothers*. At the end of the movie, a kid asked his grandfather if he was a war hero. The grandfather replied, "I am not a hero, but I served with heroes." Luc wrote, "years later when I recall the time I spent in OOPS, I will be very proud. Because, I am not a hero, but I served with heroes." When we were presenting at a conference in 2005, he not only quoted Spiderman, he also referred to Superman. He believed all volunteers were like Spiderman and Superman: we have our job during the day doing whatever we do and at night we change our clothes and become OOPS volunteers. Being volunteers brought our off-line lives, stories, and experiences into our online landscape where the OOPS fellowship flourished.

*Narrative History of Key Events*

The volunteers supported the project philosophies, and the fellowship grew day by day. The project philosophies led the growth of OOPS, several key events showcased such progress.

Key Dates	Narrative Key Events
2004/02/25	Project started.
2004/04/15	MIT Alumni Association in Taiwan held MIT OCW Seminar. Luc used this opportunity to openly introduce OOPS to the public for the first time.
2004/05/9-10	With the help of the MIT Alumni Association in Taiwan, Luc was connected with the MIT OCW team and visited them in Cambridge. The OCW Executive Director Anne Margulies was “very surprised” about our volunteer-based approach.
2004/07/16	OOPS review board was established by scholars in related fields to serve as the guard for technical content accuracy. This was an important step toward answering the mounting criticism of translation quality.
2004/08/01	OOPS members voted for its logo
2004/08/15	The first ever volunteer face-to-face gathering in Taipei, Taiwan.
2004/09/01	Luc and I attended a conference in Utah and presented OOPS. Luc also met with Dr. Wiley to discuss the collaboration possibility with his Open Learning Support (OLS) group. This group currently supports seven MIT OCW courses and is looking for an opportunity to expand its audience.
2004/11/01	Luc visited the MIT OCW team again and reached an oral agreement that OCW will sign a memo of understanding with OOPS upon the Provost office’s approval. The only requirement is that OOPS has to clearly label the status of each translated text (translated, edited or reviewed).
2004/12/19	OOPS had its first ever press conference in Taipei, Taiwan. Luc wanted to give this “knowledge gift” to the public before Christmas. OCW Executive Director Anne Margulies, via video, addressed the audience and encouraged OOPS volunteers. She regarded OOPS and MIT as joint efforts “to democratize education and information and to make the world a better place”
2005/01/25	Luc was awarded one hundred twenty five thousand New Taiwan dollars from “Johnnie Walker Keep Walking” for his vision in the OOPS project. Luc donated the money back to his Fantasy Foundation.
2005/05/01	OOPS added the John Hopkins Bloomberg School of Public Health’s ten OpenCourseware courses into its collection. This addition demonstrates OOPS’ commitment to disseminate shared educational materials beyond just MIT.
2005/06/12	Luc visited Beijing and Shanghai and held a gathering for local volunteers. A separate online forum was set up after the meetings, tailored specifically for China readers.
2005/07/10	OOPS was invited to attend the Hewlett grantee meeting in September, a

	sign of international recognition.
2005/07/30	MIT offered QA report on the oops.editime spin-off project.
2005/08/27	OOPS held its first press conference in Shanghai, China.
2005/09/01	Luc and I attended a conference in Utah. At the conference, Luc also was invited to the Hewlett grantee meeting to share his vision of OOPS with others.
2005/11/20	Luc and I attended a conference in Vancouver where he was invited to be part of the keynote presentation for Dr. Curt Bonk. In his portion of the presentation, Luc shared with the audience his OOPS experience.
2005/12/15	Luc added a new addition to OOPS- MITWorld video lectures
2006/02/01	MIT and OOPS signed an official agreement.

Table 4. OOPS Key Events

In this chapter, I provided the background context for which OOPS situated. I introduced the rise of OOPS and gave a narrative account of its early history, key events. In addition, I introduced Luc, the visionary who created OOPS, and provided a sketch of the composition of the community members. In the next chapter, I introduced the conceptual framework that guided my inquiry.

## CHAPTER THREE: CONCEPTUAL FRAMEWORK

In Chapters One and Two, I shared my journey into OOPS and the things I learned as a result of becoming a member of an online community. I also provided a brief overview of the OOPS project. In Chapter Three, I will now explore the literature related the framework of Dewey's theory of educative experience. In addition, I compare and contrast two on-going online communities, Wikipedia and Open Source, with which OOPS is often compared.

### Education, Experience, Narrative and Story

#### *Educative Experience*

Dewey (1938) believed there is an “organic connection between education and personal experience” (p. 25). This belief formed the base of his theory of experience and enabled him to juxtapose theory with practice in his later work at the University of Chicago lab school. The primary contribution of the theory of experience is the notion of an educative experience that is both personal and social. According to Dewey, not all experience is educative; an educative experience has two criteria: continuity and interaction. The principle of continuity of experience “assumes that every experience both takes up something from those which have gone before and modifies in some way the quality of those which come after” (p. 35). Here, time comes into play in a person's experience in the continuum of past, present, and future. Nevertheless, Dewey made it clear that continuity also has direction that will affect future experience. Dewey emphasized the growth aspect of an experience stating that “only when development in a particular line conduces to continuing growth does it answer to the criterion of education

as growth” (p. 30). Dewey believed every experience is a “moving force” where “its value can be judged only on the ground of what it moves toward and into” (p. 38).

The second criterion of an educational experience is interaction. Dewey held that “Experience does not go on simply inside a person... experience has an active side which changes in some degree the objective conditions under which experiences are had” (p. 39). He continued to say that “experience does not occur in a vacuum. There are sources outside an individual which give rise to experience” (p. 40). Here, the continuity of experience is affected by both internal and external factors, bringing the social milieu into focus. An individual’s experience is always a particular incident that happened in a specific time and environment. The environment, or “situation” as Dewey termed it, also has an effect on the quality and direction of that experience.

Dewey’s theory of experience, therefore, holds that the two principles of continuity and interaction intercept and unite, and that “their active union with each other provide the measure of the educative significance and value of an experience” (p. 44). As demonstrated in Chapter One, my journey into OOPS exemplified both an individual continuous experience and a social interactive experience.

### *Narrative and Story*

Clandinin and Connelly expanded Dewey’s two-dimensional experience into a three-dimensional narrative inquiry, adding the third dimension of a place. Here, we have a three-dimensional analysis of experience: individual continuous experience, social interactive experience and the dimension of place. Figure 2 illustrates such a narrative inquiry space. Narrative inquiry, then, is an experience-based inquiry method that asks both the researcher and the participants to query into our individual experience as well as

collective experience. For Clandinin and Connelly, “education and educational studies are a form of experience. Therefore, narrative is the best way of representing and understanding experience.” (p.18).

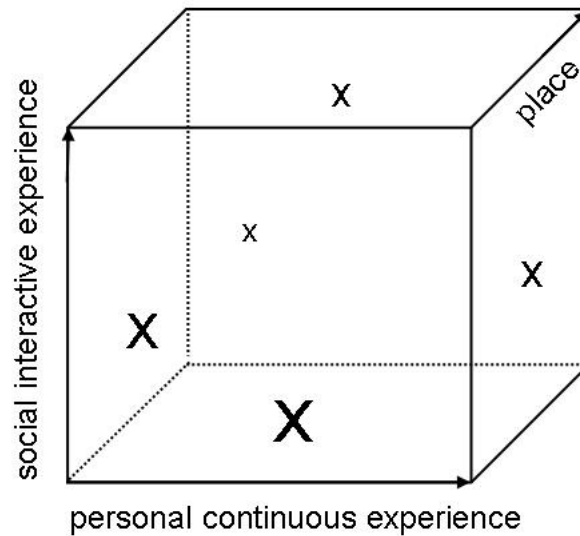


Figure 2. Three-Dimensional Narrative Inquiry Space.

The term narrative “comes from the Sanskrit *gna* via the Latin *gnarus*, signifiers associated with the passing on of knowledge by one who knows” (Kreiwirth, 2002, p.304). The Merriam-Webster Dictionary gives “narrative” two definitions: 1) a narrated account; a story, 2) the art, technique, or process of narrating. When I think of narrative, I think of everyday conversations in either verbal or written forms. Often, narrative can be regarded as “the process of making a story, to the cognitive scheme of the story, or to the result of the process – also called stories...” (Polkinghorne, 1988, p.13). Here, narrative and story seem interchangeable. Barthes (1977) helped me understand narrative further by juxtaposing narrative and everyday experiences.

[narratives are] present in every age, in every place, in every society; it begins with the every history of mankind and nowhere is nor has been a people with narrative. All classes, all human groups, have their narratives... Narrative is international, transhistorical, transcultural: it is simply there, like life itself.” (Barthes, 1977, p.79).

I realize that narrative is the only way to reach into our lived experience. If narrative is simply there, this might explain how storytelling becomes an important lens in understanding human behaviors. Sharing experiences through stories is emerging in various fields as a powerful way to exchange and preserve knowledge. Storytelling seems to be an ancient means of passing on wisdoms and traditions. Yet it also seems counterintuitive to value such a mundane practice. A revealing book, *Storytelling in Organizations* (Brown, Denning, Groh, & Prusak, 2005), provides testimony as to how storytelling has transformed organizations from four top executives’ perspectives.

In this book, business executives from IBM, Xerox and the World Bank shared how they stumbled across storytelling and narratives and how they came to understand the power of storytelling and the roles it could play in “transferring knowledge, nurturing community, stimulating innovation, crafting communications, in education and training, and in preserving values” (p. 11). The book documents the transformation of four executives from 2001 to 2004 as they learned to appreciate storytelling in their organizations. The closing chapter details a three-year period of reflection on the role of narrative in organizations (and elsewhere). We see many taken-for-granted characteristics of narrative and storytelling, i.e., that storytelling is quick, powerful, free, and memorable. We also see how narrative and storytelling could communicate naturally, collaboratively, persuasively, holistically, intuitively, and even entertainingly. Most importantly, the authors pointed out that storytelling communicates context, the

immediate environment where an event takes place and where people interact. The authors then looked backward to see why the importance of storytelling in organizations was not recognized, then looked sideways to identify the growing academic recognition of narrative and storytelling in various fields. The authors finally looked forward to predict the future of narrative and storytelling and concluded “the emergence of narrative as set of tools” (p. 176), the tools that could facilitate communication, collaboration, knowledge sharing, team building, and leading people into the future.

Stories are vital in humans’ understanding of how we bring order and meanings to our lives (Bruner, 2002). Connelly and Clandinin (1990) stated that “people by nature lead storied lives and tell stories of those lives” (p. 2). Not only do human beings live storied lives, these stories are intertwined socially with others’ storied lives. When stories are lived, told and re-told, they become narrative. Narrative in this sense “is a reconstruction of a person’s experience in relation to others and to a social milieu” (Clandinin & Connelly, 1990, p. 244). Hence, if we understand the world narratively, then it makes sense to study the world narratively. Linking back to Dewey, “Experience happens narratively ... therefore educational experience should be studied narratively (Clandinin & Connelly, 2000, p. 19). So the reason for choosing narrative as a lens in the current study lies in the link between experience and narrative.

In this study, I considered narrative as the telling of the story. In this notion, narrative composes both the story and the telling (Abbott, 2002). The story is, therefore, the “what,” the action; the telling, or discourse, is the “how,” the representation. Here, it seems that narrative and story pose different qualities. First, there appears to be an apparent paradox that a story seems to both precede and follow narrative discourse. In



other words, “the story only comes to life when it is narrated” (Abbott, 2002, p.17). Such a paradox brings the difference in time to the forefront, which in turn represents the temporality in story and narrative. Such temporality is further mediated by the teller’s telling of the story. We can also say that a story is something the teller constructs and the reader re-constructs. In other words, “stories are made, not found in the world” (Bruner, 2002, p.22). Temporality brings up the issue of continuity in human experience, while mediation speaks to that of the social interaction, two important constructs for an educative experience (Dewey, 1938). Narrative is a phenomena under both study as well as the method of study (Clandinin & Connelly, 1994, 2000). Educative experience happens narratively and hence can only be expressed and understood narratively.

Community is a social place; online community is an imagined place. Online community is imagined in the sense that it exists in each participant’s experience and is expressed narratively online in synchronous and asynchronous exchanges and offline in our storytelling. People and the artifacts that they produced created the two sources of this investigation. Narratively expressed experience can be found in the written form from the online discussion postings as well as in the oral form produced by talking to the participants. No research exists that has dealt with studying online communities that centers on narrative and experience, which gives my inquiry its importance and contribution.

### Narrative Authority and Knowledge Communities

In this research study, I have adapted two narrative conceptual analysis: narrative authority (Olson, 1995) and knowledge communities (Craig, 1995a, 1995b, 2001a, 2001b, 2004). Even though both narrative authority and knowledge communities

conceptually arose out of the teacher education literature, I believe their strong tie to narrative research makes them adaptable to other contexts. I realized that my research topic was not in the area of teacher knowledge; however, I saw a fundamental similarity that could inform my inquiry into how participants in an online community construct and reconstruct knowledge in their online experience. I recognized that Craig, Olson and my research all featured narrative version of knowledge. In Craig and Olson's work, the narrative version of knowledge is related to pre-service and in-service teachers' teaching experience, and expressed face-to-face. My work differs in that the narrative version of knowledge is related to participants in an online community, and usually expressed in written form through the online discussion forum.

Pioneered by Olson (1995), narrative authority illuminates how we create our lives through the continuous construction and reconstruction of experiential knowledge (Olson, 1995). Olsen departs from an institutionalized version of knowledge as the authority and centers on the unity of the knower and the known. Olson tells us that "we are the authoritative source of our experience" and the stories we choose to tell "shape our views of authority and accountability in our relationships with others" (p. 122). Stemming from Dewey's theory of experience that is individually continuous and socially interactive, narrative authority "is informed, and reforms through the continuous and interactive nature of experience" (Olson 1995, p. 123). Since each person's experience is individually continuous, each person's narrative authority is unique. Meanwhile, each person continues to interact socially with others. As a result, our narrative authority continues to be shaped and re-shaped via various contexts. Therefore, narrative authority is a continuously developing experiential knowledge situated in a

social context. In my view, narrative authority is an outward expression of our ability to see and value our own experience as one source of knowledge.

Narrative authority has several distinct values. First, narrative authority involves both voice and action (Olson & Craig, 2001). In other words, our individual experiential knowing needs to be expressed socially in order to gain its narrative authority. In this social process, our narrative authority will have the chance to be expanded, revised, or confirmed. These actions then form the new version of the narrative authority, which then goes through the same life cycle for continuing renewed meanings. The actions we take also reflect our narrative authority. Second, narrative authority assumes transactional knowledge construction (Craig & Olson, 2002). When a person expands, revises or confirms his or her narrative authority through social interaction, such an interaction in turn helps the expansion, revision and confirmation of someone else's narrative authority. Third, one person's narrative authority could create competing knowing that constrains another's narrative authority. In addition, a person's narrative authority could also be further constrained by his or her own unchallenged assumptions or beliefs (Craig & Olson, 2002; Olson & Craig, 2001). Furthermore, in the process of negotiating, one person's narrative authority might be valued or devalued, bringing to light the vulnerability of this social process (Olson & Craig, 2005). A knowledge community is an example of a place where individual's narrative authority is recognized, legitimized, and developed, not devalued or constrained.

A knowledge community is Craig's (Craig, 1995a, 1995b) conceptualization of a "safe place" where teachers discuss their practice and "teachers are offered that enable situations to be revisited, reassessed, and restoried" (Olson & Craig, 2001, p. 671). Such

a “safe place” supports a high degree of trust and interpersonal relationship among its members. Members interact in the safe place, allowing individuals to grow and reflect on themselves and others in ways not possible through sole reflection. In Craig’s conceptualization, members join a knowledge community through shared experience or event. Therefore, members may join and leave, new people may enter, resulting in the forming, evolution, and maybe dissolving of a particular knowledge community. In other words, a knowledge community’s boundary might shift to reflect its current composition. Each person might belong to several knowledge communities at one time, bringing with them different versions of their stories to each community. Furthermore, in knowledge communities, members share their stories, respond to each others’ stories, negotiate meanings, and expose multiple perspectives. In Craig’s work analyzing the knowledge community, she assumes an “intimacy” where members know each other, meet face-to-face, and interact in their knowledge communities over an extended period of time.

It is not difficult to see why a knowledge community could be one of many places where narrative authority could be nurtured, encouraged, and developed. It is also logical to conclude that in such a non-threatening place, competing narrative authorities and the devaluation of one voice for another does not exist. Both narrative authority and the concept of a knowledge community provide the first lens in analyzing my research data at the micro, personal level.

### Wikipedia Model

The growing attention to the still-evolving Wikipedia project and the well-documented success of the Open Source Model provide two examples of the increasing interest in how online communities collaborate and produce results. We are obligated to

take a closer look at the characteristics of both models, especially when OOPS is often regarded as similar to each. Wikipedia and the Open Source Model provide the second lens in analyzing my research data at the macro, organizational level.

Wikipedia is a free online encyclopedia to which anyone can contribute. Created in January 2001, Wikipedia started out only as a side experiment of a failing project called Nupedia.com, which also aimed to create a free online encyclopedia. However, Nupedia.com employed a traditional pre-publishing review process that demanded an elaborate and often long procedure of coordination among submission, reviewing and negotiation. Few articles were published as a result of this arduous process. Wikipedia was created as an experiment to bypass this pre-publishing review process and empower the post-publication, real-time, peer-review procedure, collaborated by volunteers (Ciffolilli, 2003; Voss, 2005).

Wikipedia is one of the largest instances of a Wiki, a web-based, collaborative technology. Pioneered by Ward Cunningham in 1995, a Wiki site allows a collection of web documents to be directly edited by anyone with an access to the Internet. Each modification is recorded as the history of this document. The history page records the time of change, the person who made the change, and the changes that were made. Such a mechanism not only permits page retraction by anyone, it also behaves as a podium for reputation management. In addition, the history page permits open and multitude examinations of each revision, allowing each version to be compared and contrasted by anyone. Wikipedia quickly became an online volunteer community with its devotion to the creation of a free encyclopedia where the division of labor is facilitated by information technology.

According to Alexa, a web ranking service, as of February 2006, Wikipedia has become the 23rd most visited website across all languages (alexa.com, 2006). Wikipedia has enjoyed a tremendous, if not exponential growth in terms of registered users, number of articles and number of languages. Wikipedia quickly overshadowed Eupedia.com and caused Eupedia.com to close in 2002. As of January 2006, the English Wikipedia alone had over 930,000 articles. The combined Wikipedia includes more than 200 languages, 3.1 million articles, and almost ninety thousand contributors. The English language version of Wikipedia continues to be the largest, while some other language versions remain quite small (wikipedia.org, 2006b). This is an impressive amount of work to accomplish in three years. It is also obvious that a vast number of willing volunteers awaited just such an opportunity to contribute.

Wikipedia's exceptional growth is best described by Voss (2005) who conducted one of the first quantitative analyses of the structure of Wikipedia. From the elaborated numbers, charts and mathematic formulas presented by Voss, I obtained a better picture of the overall Wikipedia community. As expected, Wikipedia experienced a period of linear growth and the mathematically-signaled exponential growth did not happen until April 2002. The number of new articles increased at various speed among different languages. Even though everyone is invited to contribute, the average number of authors per article remains 4 to 5, a number much lower than what I had anticipated. Even more interesting is that about half (47.9%) of the articles have less than five authors and more than one-third (27.6%) of the articles in German Wikipedia had only been edited by one author. Looking from a different angle, a third of the Wikipedia authors have only contributed one article, and only twenty percent have been involved in more than sixteen

articles. Granted that Voss excluded anonymous edits in his calculation, these numbers informed me of one thing: not everyone will contribute just because they can. Another interesting number in Voss' report is the percentage of anonymous edits in different languages. Among the five languages he included in his analysis, Japanese, the only Asian language among the five, had the highest percentage of anonymous edits, forty-two percent.

But how about graffiti? With a system as open as Wikipedia, it is bound to attract many people, good-willed as well as ill-willed. Greif and Wattenberg (2004) conducted a research study for IBM on the phenomena of vandalism on Wikipedia. They were surprised to find vandalism on most Wikipedia pages they have investigated. However, they were also surprised at how fast it was fixed. The researchers concluded that Wikipedia is "highly vulnerable, but self-healing" with an average repair time within five minutes. The average edits per minute in the English Wikipedia are sixteen, as reported by Voss (2005). Can I assume that many of those edits were to correct errors? Also does the so-called "self healing" imply better quality?

I think IBM's study only demonstrates Wikipedia's quick speed in responding to changes. However, there is still an obvious gap between speedy change and the quality of the content, about which Wikipedia suffers constant criticism. Robert McHenry, the former editor-in-chief with the Britannica, was among the many who were critical of Wikipedia. He called Wikipedia a "faith-based encyclopedia" that disguises itself as an incredible example of an open-source intellectual collaboration (McHenry, 2004). This completely volunteer-based project, McHenry asserts, exercises the belief that "some unspecified quasi-Darwinian process will assure that ... articles will eventually reach a

steady state that corresponds to the highest degree of accuracy.” McHenry uses an example in this article to illustrate that a Wikipedia article was in fact edited to introduce more factual errors, contrary to the public faith. In McHenry’s opinion, even if a Wikipedia article may at one point in its life be deemed reliable, it is “forever open to the uninformed or semiliterate meddler.” If a credible and stable state can never be reached, then is Wikipedia doomed to fail?

Larry Sanger, who co-founded Wikipedia, was one of the few, if not the only person from the “inner circle” who has openly criticized Wikipedia. Sanger left Wikipedia when his position ran out of funding even though it is public knowledge that his departure had much to do with irreconcilable differences between him and another co-founder Jimmy Wales around management issues. Sanger has never been shy about sharing his dissatisfaction with the organization and continues to share his views about how Wikipedia should be managed. In one such article, Sanger pointed out two problems Wikipedia had suffered and insisted that a fix was long overdue (Sanger, 2004). In his view, the lack of public perception of credibility and dominance of difficult people could be summarized in one “root problem” - anti-elitism, and lack of respect for expertise. The reason why the public perceives Wikipedia as lacking credibility goes with the philosophical premise of Wikipedia that *anyone* can contribute, anyone can hold and experience knowledge. In addition, an encyclopedia carries the connotation of being a reliable source ; anything less than creditability is unacceptable. This notion is shared by Orłowski (2005) who argues that “something [that] aspires to be a reference work ought to be judged by the quality of the worst entry.” In order to fix the problem of public perception of the lack of credibility, Stanger suggests that the authors of reference



materials work closely with academia, to seek support and participation from teachers, researchers, schools, and libraries. He calls for getting experts on board and establishing a credible review process. This way, Stanger believes everyone can still participate but experts are respected. Recall Nupedia.com? Ironically, I believe Stanger's suggestion resembles this failed project which enabled the birth of Wikipedia. What really matters here? Is it the quality of work we produce or who we are? Or maybe who we are "predicts" the quality of our work?

On the other hand, I related better with Stanger's second point. In his view, many abusive behaviors were tolerated in the Wikipedia community-- in fear of being labeled guilty of "censorship"-- leaving no mechanism in place to value expert opinions. As a result, the person who persists, wins. Most experts do not have the time and energy to "put up with" such a fruitless fight. I can see the flaw of a system that grants recognition to its members not on their expertise but instead on the time spent working on the project. Stanger predicts that there should be an "academic fork of the project in the future." A forking is a new version branched out of the original and developed separately. Again, Stanger believes some sort of academic involvement is necessary in order to establish the credibility and expert opinions on the project.

Stanger also brings up an interesting point about how reputation is recognized in the Wikipedia community. Upon closer examination, I found that Wikipedians acquire their reputations by their activities: how long they have been in the community and how many edits they have contributed. In order to be promoted to an administrator, who will then have some additional editing privileges, a person needs to submit the request, and a public voting will take place where anyone can vote to support or disapprove such a

promotion. According to Wikipedia's own description, persons with "less than 3-6 months experience and 1000-2000 edits very rarely succeed in becoming admins"(wikipedia.org, 2006a). I can only assume that voters will look into a candidate's past history and evaluate the promotion based on the quality of work he or she has preformed. While searching for Wikipedia's policy about promotion, I also ran into some interesting numbers. As of February 2006, Wikipedia had over eight hundred registered users who had system admin privileges. In addition, Wikipedia has several other "roles" such as "bureaucrats" and "developers," where the promotion process is the same as the admin. I realized that Wikipedia, after all, still has a social structure where its members could build their reputation and gain promotion.

Almost 10 months after Stanger's article, another co-founder, Jimmy Wales, also acknowledged that Wikipedia does indeed suffer serious quality problems. The utopian notion of not having an absolute quality does not prevail in the public's eyes. Orłowski (2005) presents three common ways Wikipedia supporters respond to criticism: (1) fix anything you do not like, (2) the speed to fix any error is faster than any alternatives, and (3) Britannica (a traditional encyclopedia) also has many errors. These arguments seem logical at first sight. Nevertheless, I keep going back to the notion that quality should be judged "by its worst entries rather than its best" (Orłowski, 2005). Should we be content with "many" good works or should we always be reminded of the worst entries? To counter argue point number one, we know from Voss's (2005) report that, in theory, anyone can fix anything. In practice, people do not. *Nature* (Giles, 2005) surveyed its authors to find out that even though 70% of those who responded to the survey had heard of Wikipedia, of which 17% checked it on a weekly basis, less than 10% actually

participate in updating it. If only 10% of *Nature*'s surveyed authors, respected scientists in the field, choose to participate in Wikipedia, it makes me wonder how we could get academia involved and regain Wikipedia's credibility. To argue point number two, we learn from both Voss's (2005) and Greif and Wattenberg's (2004) mathematical calculation that Wikipedia certainly is quick in fixing things. However, I continued to wonder if all these fixes contribute to better quality.

The debate about Britannica and Wikipedia finally came to a clearer understanding when, in December 2005, *Nature* published a comparative study. The first scientific study about Britannica and Wikipedia reveals that "Wikipedia comes close to Britannica in terms of the accuracy of its science entries" (Giles, 2005). In this study, *Nature* compares websites of Wikipedia and Encyclopaedia Britannica on a broad range of scientific disciplines. *Nature* then sent both articles to a relevant expert for peer review. The experts were not told which article came from which encyclopaedia. Except for eight serious errors, which split evenly between the two encyclopaedias, reviewers found many factual errors, omissions or misleading statements: 162 in Wikipedia and 123 in Britannica. Considering that Britannica represents the traditional paid expert, pre-publishing editing process, I cannot help but be amazed at the "close" quality this study uncovers. However, Orłowski makes a compelling argument that Britannica's errors do not "cancel out" Wikipedia's mistakes. Depending on your point of view, you can read *Nature*'s article and conclude that either Wikipedia is "as good as" Britannica or Wikipedia is "as bad as" Britannica. Both are human endeavors albeit in different ways and subject to human frailties.

To summarize, the Wikipedia community has the following characteristics. It is a volunteer-based project to which everyone can contribute. The Wiki technology facilitates division of labor, enables the ease of contributing and participation, and records all change histories for easy examination and recovery. It is a rapidly growing community where authority is gained through individuals' active participation. Its social structure does not necessarily recognize people based on their expertise even though it does employ a promotion mechanism for various roles in the community. Positioning itself as an encyclopedia, Wikipedia inherits the perception of being a reliable reference source. However, its credibility continues to be questioned. However, I wondered if and how an academic involvement would solve the quality issue.

Wikipedia as an ongoing phenomenon might morph into a more matured model in the near future. On the other hand, the Open Source Model has already proven itself to be an effective knowledge production process. What can we learn from it?

### Open Source Model

Steven Weber, a professor at Berkley, published a book in 2004 titled *The Success of Open Source*. In this book, Weber gives detailed accounts of the early history of open source, the development of various software from the 1960s to the 1990s, and the rise of Linux. I was amazed that the first open source collaboration was born out of necessity in the 1950s. It was at a time when only organizations like the Department of Defense could afford computers. In those early days, there were not many programs written for any computer. Several companies, such as Lockheed and Douglas, came together to build the basic tools that everyone needed but could not afford to write them individually. In addition, Unix set the standard of creating small and simple programming codes that

would work together once integrated. In 1969 Ken Thompson, an ambitious researcher working at Bell Lab at the time, released an earlier version of Unix, with the intuition that it was necessary to “write programs that do one thing and do it well,” and “write programs that work together.” (Weber, 2004, p. 28). Weber writes broadly about various open source projects in his book. I, however, choose to look more closely at one particular project, Linux, for the focus of the remaining text since it has a colorful history and is still an ongoing phenomenon.

What is open source? Warger (2002) defines it as “an approach to software development and intellectual property in which program code is available to all participants and can be modified by any of them” (p. 18). “Think Zen,” Linux Torvalds, the creator of Linux said, “the project belongs to no one and to everyone” (Torvalds & Diamond, 2001, p. 71). The recent success of Linux helped establish the Open Source Model as a solid knowledge production process that involves international volunteer programmers. Linux was first released in 1991 by Linux Torvalds. However, Torvalds did not create Linux from scratch. Instead, Torvalds used another program called Minix as the foundation to create his own code. In the spirit of open source, it is more important to identify good designs from others and to build on top of them rather than to originate an exceptional code yourself (Raymond, 2000). In addition, the Internet began to become more available in 1990s, making it possible for Linux to draw international programmers. However, what I find the most important enabling factor is the licensing scheme. The principal goal of open source is to maximize the continued use, growth, development, and distribution of the free software. In order for anyone to be able to freely run, study, redistribute and change the software, all original programming codes need to be shared,

and they are. Torvalds rightfully attributed General Public License (GPL) as the powerful tool for the open source movement. GPL, created by Richard Stallman in early 1980s, established the platform on which much open source software, including Linux, flourished (Torvalds & Diamond, 2001; Weber, 2004). These stories tell me that what is now widely held as the spirit of open source was developed over many years and shaped by many people, events, and technology.

I find it interesting that Weber calls these Linux volunteers user-programmers. It is obvious that they are not only the programmers who would help develop the program, but the users who would install the program on their computer and use it, as well. Given the difficulty of providing a “true” measurement of the scope of open source, the number of ongoing projects, and the number of active user-programmers, Weber still managed to provide some demographic data drawing from various survey sources. To my surprise, Europeans remain the largest contributors to Linux in a per-capita base even though the United States had the greatest absolute number. Regardless, open source is truly an international endeavor with contributors from all over the world. Using contributors’ email addresses (such as .edu, .com) as an imperfect measurement, one survey suggests that most contributors come from institutional affiliation (.com), which could imply that these open source contributors write codes as part of their daily work. I see this generalization as having profound implications: these user-programmers integrate their work with their volunteer action. Immediately I see how this could be one of many factors that made the open source model dramatically different from projects such as Wikipedia. Even though both models encourage anyone and everyone to participate, it is the open source model that is able to attract the “experts.” Many open source projects are

not too different from other team efforts at least in one aspect: a relatively large percent of the work seems to be done by a relatively small percent of the people. Weber found that more active developers are also usually more active in participating in discussions.

What would be these people's motivation? Weber offered his answers, ranging from the love of art and creativity of programming to the satisfaction of having a public venue for one's work and garnering recognition. Many user-programmers see programming as a vocation: participating in open source is like scratching their own itch. Other user-programmers started out wanting to solve a personal problem (Raymond, 2000). In the problem-solving process, user-programmers experience human creativity and expression, which only increases their passion to participate more (Torvalds & Diamond, 2001). Some believe the open source model yields better software. Behind the creative endeavor also lie the shared beliefs that information should be free, that computers can change human life for the better, and that we should judge people on the basis of what they create but not on what credentials they present (Weber, 2004). I see user-programmers in open source as similar to Wikipedians in that both are driven by the freedom of creativity and expression. However, in an open source community, user-programmers are also driven by an itch to solve a problem. In this regard, again, it would be the "experts" who can contribute, even though "anyone" can. I do not see this important intrinsic factor playing out in the Wikipedia community.

Linux did not have its clear identity until 1997 when Eric Raymond, a talented open source developer, presented his synthesis of what open source communities do to a user conference. In his article titled "The Cathedral and Bazaar," Raymond articulated the open source story and provided a coherent image of what they were doing and why it

seemed to work well (Raymond, 2000, 2001). According to Weber (2004), Raymond is a self-proclaimed open-source ethnographer who has participated in and followed the open source development for many years. One of Raymond's best-known phrases, now known as the Linux Law, states that "Given enough eyeballs, all bugs are shallow." This, in Raymond's mind, exemplifies the most significant difference between what he called the cathedral-builder and bazaar-builder. The cathedral-builders are inclined to follow a linear pattern, where programming and debugging are elaborate tasks that usually take months to iron out. Ironically, this process inevitably creates disappointment when long-awaited products turn out to be imperfect. On the other hand, in bazaar-style development, it is assumed that all bugs will be discovered quickly when exposed to a mass number of eager programmers. As an ex-programmer myself, I can certainly appreciate the concept behind this logic. I understand why debugging could be tricky, especially when there are almost an infinite number of paths a user could potentially travel through a program. To find all possible routines and ensure that all of them work is not something trivial. Recall that the open source community is comprised of diverse people; people with diverse backgrounds think, see, and do things differently. As a result, opening the programming code for everyone to see increases the likelihood of getting the problem spotted and fixed. "Release early, release often" is yet another famous open source concept that follows a similar logic. Quick releases can certainly keep the community stimulated. Comparing open source to Wikipedia yields some similarities and differences. Wikipedia clearly resembles an open source community in the notion of providing a bazaar in which "anyone can." Wikipedia is also known for its speed in fixing vandalism. However, in Linux, the ones who can spot the bugs and fix



them possess certain expertise. Maybe it is the “expertise” of the community that sets open source apart from Wikipedia?

Regardless, the real question is how a voluntary project involving thousands of people can be coordinated in an effective way. Weber (2004) calls open source a production process, a process not just about creating software but more about coordinating distributed talents to produce a highly complicated product. According to Brook’s Law, adding more people to an already-late project could only result in delaying the project even further. This classic book about software engineering points out for us a subtle yet important phenomenon regarding human communication. As more people are added to a project, the complexity of communication and coordination increase.

Unfortunately, the speed at which the manpower helps arrive at a solution is slower than the complications it brings to the problem. In this case, how could open source be successful when hundreds if not thousands of programmers are writing codes, reporting bugs, and creating bug fixes at the same time? Here I came to my biggest surprise about how Linux works in its organizational structure and decision-making process.

It turns out Linux employs a pyramidal governance structure, facilitated by technology. Each piece of code could be “checked out” from the system and fixes applied. User-programmers are made aware of when and of who has checked out a particular piece of code at whatever point they decide to check out that same piece of code. Once a fix is applied, a user-programmer can “check in” the new version.

However, whether a fix that is submitted by any user-programmer will be integrated into the next release is up to the maintainers who are the individuals responsible for that particular module. Recall that open source is written in individual modules that could be

later integrated into a larger system. Each of the modules would have maintainers who are responsible for making a local decision as to the merits of the new fix and if it should be incorporated into the new release. This new module then travels upstream to the next-level maintainers, who are responsible for larger modules incorporating several smaller modules. The code continues to travel upstream until it reaches Torvalds. Here we see how technology, in this case a code-management system, facilitates the production process.

Interestingly, this pyramidal system evolved as a response to the first Linux crisis in September 1998 when Torvalds failed to respond to his developers in an efficient and timely fashion. It was also the first time that the community realized that “Linux does not scale” when under stress. A major forking was about to erupt when Eric Raymond, the unofficial anthropologist, as Weber (2004) calls him, stepped in and “depersonalize[d] the situation and repackage[d] it as an issue about organizational efficiency” (p. 118). The community strategized ways to relieve some of the pressure on Torvalds, and a “formal pyramidal structure for the flow of patches and software submissions” (p. 119) was in the making. In 2002, Linux underwent its second crisis for the similar reason: Torvalds failed to keep up with a particular driver update and ignored its contributors. According to Weber (2004), however, this time Linux had developed into a much more matured community where its members could quickly refocus their energy on finding a solution. Through these crises, Linux’s pyramidal structure and the roles of participants, such as maintainer and lieutenant, became more formalized. However, one important key concept to remember is that Linux continues to maintain its spirit of voluntary participation and voluntary selection of task. It is the decision-making

process that resembles a pyramidal structure, with Torvalds at the top. This structure, however, was created through years of trial and error, demanded by the community, with the goal of achieving a more scalable and efficient production process. None of the maintainers or lieutenants was hand-picked by Torvalds; they gained their status by their contribution in the community. In this regard, it appears that Wikipedia bears a resemblance to an open source model.

My most important discovery about open source came when I learned that technical rationality plays a critical role in building its community. Technology rationality, as articulated by Weber (2004), begins with the belief that “there exist technical solutions to technical problems” (p. 164). Technical rationality not only functions as the ground in conflict resolution; to a larger extent, it influences intrinsically the way the open source community organizes itself. All arguments should center on the merits of the code, not on personal attack. In other words, “let the code decide” (p. 164). It is not hard to understand that, driven by the desire to write better codes, Linux has evolved to the pyramidal social structure. Producing better codes requires better coordination of the efforts and therefore of the structure. However, Weber stressed that the technical rationality in open source is not deterministic but is actually embedded in its culture. Recall earlier that Unix set the standard for the smallness and simplicity of good programming. The core idea is modularity and flexibility. In order to achieve these, not only do the codes have to be “clean,” they need to be able to interface with each other as managed by the open source community. These narratives tell me that the open source community, driven by the desire to write better codes in a more efficient way, is inherently driven by the technological need to accomplish the task.

Open source also has its fair share of challenges. Bezroukov (1999a,1999b) is especially critical of Raymond's cathedral and bazaar document (Raymond first published his article in 1997 and later revised it several times over the years and the latest version was last modified in 2000. Bezroukov was referring to the earlier version of the document rather than what is currently available). He criticized the cathedral-vs-bazaar metaphor as being over-simplified. I however, disagree. Metaphor is always imperfect. The cathedral-vs-bazaar metaphor meant to me the focus of a more decentralized governance structure such as the one open source employs. He also questioned whether the open source model necessarily produced better quality software, as many open source programmers believe. Like Weber (2004), Bezroukov (1999a) also pointed out that the open source community is not comprised of like-minded people. Conflict is inevitable and since forking is positively reinforced and encouraged by the open source license scheme, forking does happen. A community could dissolve and a new one could be created.

Furthermore, "open source" does not imply "free." Many hidden costs are inevitably associated with this model, with maintenance and support ranking at the top of this list (Kapoor, 2005; Stunden, 2003; Warger, 2002; Wheeler, 2004). Even within an open source community that is comprised of user-programmers, the on-going patch work could be daunting, particularly for a layperson who would like to enjoy the free software. One of open source's successes is attributed to its large user base. How do these people obtain support and manage ongoing upgrade and maintenance? To a large extent, companies such as Redhat Linux play an important role. With a minimal fee, Redhat re-packages the free Linux software with a detailed document and a much easier-to-use

installation process. The success of such a business model allows software such as Linux to spread deeper into its user base. Redhat now employs several of Linux's top maintainers as Redhat's way both to give back to the Linux community and to keep the company close to the Linux development. The business model between Linux and Redhat exemplifies a creative and productive collaboration for win-win solution. In short, in open source, if you are a user-programmer, you could self-support and maintain the use of the software. If you are a lay person, you could buy a documented version from Redhat for a fee, therefore exempting yourself from needing the know-how of the code. In this regard, I wonder how Wikipedia fits? As a reference work, can we reasonably ask Wikipedia's users (the lay person in open source's example) to be involved in the on-going development of Wikipedia (the support and maintenance in open source's example)? In addition, there are potential dangerous consequences involved in a large online community. Burnouts and an overwhelming workload, unresolved conflicts and lack of support from peers could lead to member drop-outs (Bezroukov, 1999b; Giles, 2005).

In summary, the success of open source provides abundant examples of how a voluntary community could evolve into a productive production software process. Technical rationality is embedded in the open source community culture for dispute resolution and the facilitation of decision making. Linux has evolved to employ a pyramidal organizational structure, yet all participation remains a voluntary self-selection process. Modality not only highlights the feature of the code itself, it characterizes the loosely-coupled flexible social structure of the community as well. Learning the history of Linux tells me that the way Linux, as well as many other open source communities,

organize, communicate and coordinate is a result of many years of evolution, shaped by people, events and technology.

## CHAPTER FOUR: METHODOLOGY

In the current research, I drew on stories of the community members to understand events that bridged both the online and offline experience of my participants. Since experience is individually continuous, I looked forward and backward in each participant's personal history, beliefs and assumptions as they contextualized their stories. Experience is also socially interactive; therefore, I placed the narratives, the telling of the stories, within each participant's local and online context, with an attempt to understand if and how such experience was influenced socially. In other words, I asked the participants to look both inward as an individual and outward as a member of a community as they shared their stories.

This general direction arose as a result of an interactive process (Maxwell, 1996, p.164). My research sprang from my desire to fill in the gap that my experiential knowledge had not been able to answer. My research question was colored by my obvious personal interest, practical interest, and research interest, and was congruent with the research context. As illustrated in previous chapters, I had developed some tentative theories to explain parts of the phenomenon, yet those personal theories and the ones that emerged were retested, and, in the process, reshaped the research question.

Therefore, a qualitative research method, specifically narrative inquiry, was employed in this study to try to address the question regarding OOPS participants' online and offline stories. Because the use of narrative allowed for systematic study of personal experience and meaning, it fit well with the research question. The narratives provided the foregrounding text situated within the backgrounding of the computer-mediated communications on the discussion board. We are storytellers because stories are vital in

humans' understanding of how we bring order and meaning to our lives (Bruner, 2002). Human beings live storied lives that socially are intertwined with others' storied lives, and understanding storied lives is one way of understanding human social phenomena. Storytelling provided the second lens in the current study to uncover the lived experience people underwent as they were becoming and being members in an online community.

#### Backgrounding/Online: the Conceptualization of the OOPS Landscape

Clandinin and Connelly (1995) use the landscape metaphor to help them imagine the complex world in which teachers live and work. In their previous work, they studied the teachers' personal practical knowledge in their classrooms. Since teachers do locate themselves both in and out of classrooms, their personal and communal lives intersect. Built on their previous work on personal practical knowledge, Clandinin and Connelly then proposed the professional knowledge landscape metaphor as a way to reveal how teachers make sense of their understanding and teaching in a border context. Clandinin and Connelly explain the use of the landscape metaphor in imagining teachers' professional knowledge landscape:

It [landscape] allows us to talk about space, place, and time. Furthermore, it has a sense of expansiveness and the possibility of being filled with diverse people, things, and events in different relationships. (p. 4)

The notion of in and out of the classroom was well suited to my purpose of imagining OOPS participants living both online and offline lives. The landscape metaphor was also useful in helping me conceptualize the moving back and forth between the online and the offline, positioning such intersection as the point of inquiry. Because experience is continuous in nature, in this landscape, OOPS participants repeatedly cross back and forth between two different places on the landscape – one



visible to others (online), and one shielded from observation; one public, one private; one with many others, one entirely with Self. However, the boundaries as such are permeable because one's public and private selves inform one another.

As indicated in Chapter Two, I interpreted the online space as the visible, the public, the place with "others" – the project web site, discussion forum, newsletters and media converge such as TV interviews or newspaper reports. Hence, the offline space consisted of each participant's life beyond OOPS – their personal ideas, skills, beliefs, attitudes and more. I wanted to navigate this multi-faceted OOPS landscape and understand how this online community has developed, through the lens of participants' OOPS online and offline experiences.

OOPS as a virtual community was knitted together by virtue of an online forum. There were several face-to-face gatherings in Taipei, Taiwan; however, only a small number of volunteers attended. Because this online forum uniquely tied all the volunteers together, I considered this forum the "commonplace of experience" (Lane, 1988), a place all volunteers could come to and interact, a place on which volunteers built relationship.

This commonplace provided the social fabric in which volunteers intertwine our individual stories with others' stories. I termed this location the "storied landscape," the place where individual stories intersect with others' stories. The storied landscape afforded a stage where OOPS volunteers lived their shared lives. In order to understand the lives in this landscape, I needed first to understand the context. Figure 3 displays a snapshot of the online forum, the storied landscape as I called it. This forum is very similar to any other web-based asynchronous discussion board in that it has a title (illustrated as number 1 in the picture) and a table-of-content-like navigation structure.

Each row in the picture is a thread, defined as “an ongoing discussion of related messages that grows from one particular posting” (AOL). A thread may receive no replies or multiple replies. All replies, as well as the initial message, are considered to be individual postings that constitute the thread. There are five columns available in display for each thread: the title (number 3), the total number of replies to this particular thread (number 4), the person who initiated this thread (number 5), the total number of times this thread as a whole has been viewed (number 6), and the last person to respond to this thread, with a time stamp (number 7).

The screenshot shows a forum interface with a table of threads. Red callouts point to specific elements in the table:

- 1. forum title: Points to the forum header.
- 2. individual thread: Points to a single row in the table.
- 3. thread title: Points to the title column of the table.
- 4. # of replies: Points to the replies column.
- 5. initiators: Points to the initiator column.
- 6. # of views: Points to the views column.
- 7. last respondents: Points to the last responder and timestamp column.

主題	回覆	發帖人	觀看	最後發表
公告: 2004年12月19號活動留言板! [ 0 附件: 1, 2, 3 ]	56	lucifer	5103	2005-04-02, 04:00 lucifer
公告: OCW中文計畫的理想! [ 0 附件: 1, 2, 3 ]	34	lucifer	8011	2005-03-31, 08:43 lucifer
公告: 登錄課程開放公告...>	1	lucifer	1119	2005-03-18, 09:25 lucifer
公告: 新版網站上線測試中...> [ 0 附件: 1, 2 ]	23	lucifer	2685	2005-03-13, 22:16 lucifer
公告: 各位! 又有好消息! [ 0 附件: 1, 2 ]	19	lucifer	3409	2005-03-07, 17:01 anchemus
公告: 自由文化新書計劃...> 請來幫忙抓錯!	2	lucifer	745	2005-02-13, 03:35 lucifer
公告: 向教工們說謝謝! [ 0 附件: 1, 2, 3 ]	119	lucifer	9317	2005-02-13, 01:23 lucifer
公告: 教工如何與當地的華文媒體接觸?	8	lucifer	2176	2004-12-26, 20:03 lucifer
公告: 麻省理工學院校內特殊編寫網頁!	3	lucifer	6012	2004-12-21, 03:37 lucifer
公告: 我們的BANNER做好啦!	10	lucifer	3297	2004-12-01, 11:09 lucifer
置頂: 草擬了一份新打計劃的守則, 請相關工友一併討論	6	filestorm	507	2005-03-15, 08:17 alin

Figure 3. The OOPS Storied Landscape

As newcomers and seasoned members came to this forum and interacted, they entered into the Storied Landscape within the structure described. Each page displays fifty threads in the table-of-content-like fashion which I call “the thread list.” Users can navigate to the next page, which contains the next fifty threads. All threads are displayed

in reverse chronological order with the newest ones on the top. As people respond to threads, the order of the threads dynamically changes. During OOPS' first year of operation, between project inception in February 2004 to January 2005, there were seven hundred and thirty four (734) threads posted, yielding a total of two thousand nine hundred and seventy seven (2,977) responses. This large amount of archival data provided one form of rich information that helped me make sense of OOPS, its volunteers, and their stories and experiences.

This conceptualization of the online forum – a place of communication - as the Storied Landscape gave new meanings to my initial research question. This conceptualization not only acknowledged OOPS as an online community, it gave rise to the importance of its place in my research. In understanding volunteers' storied experiences, I needed a lens that could help me unpack this information which would, in turn, partially address my research question: how has OOPS been formed, evolved, and sustained as its members experienced the tensions and learning involved in the process? In this inquiry, OOPS community included the volunteers, anonymous visitors, and self learners.

#### Foregrounding/Offline: Narrative Inquiry

My choice of a qualitative method was not merely due to the nature of the research question; it was also influenced by my prior research experience. During my Internship, I had the privilege of working with a professor and another graduate student. We conducted a meta analysis to evaluate recent quantitative research on the effects of teaching and learning with technology on student outcomes. While the research indicated that technology has a small, positive effect on student learning, many of the studies

lacked the specificity that was needed for us (and potentially others) to code all of the teaching and technology characteristics that we were specifically interested in. Without that explicit information, instructional technology is considered to be in a “black box” stage, meaning there is research needed in order to understand instructional technology’s effectiveness.

In that experience, I started contemplating the question of “how” instead of “how much” and I was dissatisfied with the lack of certain details in many quantitative studies that qualitative research might better address. For example, during the investigation of this research, I became more interested in understanding the teachers’ and the students’ prior technology background and how that might contribute to their using technology in the classroom. When almost none of the quantitative studies included in our research provided such information, I could not help but be concerned about the interpretation of our quantitative results. Having a computer science master’s degree, I am comfortable with numbers and charts. However, my interests have developed toward the process of questioning of how things happen.

During Fall 2003 and Spring 2004, I took two classes from Dr. Craig during which I had the first taste of the power of understanding experience and the elegant nature of narrative inquiry as a research method. During that time, I completely opened myself up to experience and knowledge generated through narrative and turned myself around 180 degrees, only to realize that the project I thought was my dissertation was too foreign to me, both in my lack of understanding of school context and in the absence of my personal interest in the investigation. In that personal encounter, I witnessed first hand how important past experience influences present behavior. That experience alone is

a true testimony to the usefulness and power of understanding experience through narrative inquiry. That knowledge not only served as the wake up call I needed to redefine my research interest, it also resulted in my choice of narrative inquiry as my methodology. In addition, Clandinin and Connelly's three-dimensional narrative inquiry space (Clandinin & Connelly, 2000) matches my personal philosophy of how time, place and people emerge during my OOPS experience, as illustrated in the opening paragraph of Chapter One. Furthermore, since I am interested in "writing about people, places, and things as becoming rather than being," (Clandinin & Connelly, 1994, p.145) narrative inquiry fit well with my research interest.

### Methodological Challenges

#### *The Distance*

The biggest concern in gathering information was the obvious and inevitable physical distance between me and my participants. Based on my initial experience with Luc, I became dissatisfied with the kind of information I could obtain from him. The kind of scattered, disconnected online chats or email exchanges did not give me the full blown picture of his experience with OOPS. Research shows that computer-mediated communication and distance bring with it inherited incoherence (Herring, 1999) and inhospitality to social interactions (Bampton & Cowton, 2000). At the same time, I believed social interaction plays a key role in knowledge development (T. Erickson & Kellogg, 2003; Gunawardena, Lowe, & Anderson, 1997; Gunawardena, Lowe, & Carabajal, 2000; Swan, 2002; Tu, 2001; Tu & McIsaac, 2002). This apparent discrepancy raised methodological issues in conducting narrative inquiry in a computer-mediated communication (CMC) mode. My desire to talk to my participants face to face signaled

the desire to have a “closer” relationship. I puzzled over this desire and wondered if and how a psychological “close” relationship could flourish over the Internet. In the process of “learning from strangers,” (Weiss, 1994) I pondered how strangers become research collaborators via the Internet. Mann and Stewart (2000a) asked the question if “CMC [is] a suitable medium for interviewing?” (p. 126). They concluded that the “jury is still out” (p.159) in answering this question because CMC provides both affordances and challenges as an interviewing method.

### *The Affordances*

CMC has provided practical benefits in my research study. Through the Internet, I was able to access my participants who lived in four different countries: Australia, China, Malaysia, and Taiwan. We communicated via email or VoIP software that was essentially free. The time and cost saved in traveling to a mutual location benefited both me and my participants. The e-mails we exchanged function as the “verbatim account” of our conversations and “eliminate[ing] transcription bias” (Mann & Stewart, 2000b, p.22). With the copy and paste function within the Windows environment, data recording and handling became easier (Bampton & Cowton, 2000; Dholakia & Zhang, 2004).

For communication such as e-mail, because of the inherent nature of time gap, some researchers believe such a asynchronous nature could support the possibility of great reflection, flexibility in response time, and has the potential to produce richer information (Romiszowski & Mason, 2004). For example, the flexibility in time gave me, a novice researcher, the opportunity to reflect on participants’ answers and think about additional probing questions. Both my participants and I could take time to respond to the developing dialogue (Bampton & Cowton, 2000).

Moreover, CMC offers a “safe environment” for both the interviewer and the interviewee, especially during the initial contact period. For example, Bamption and Cawton (2000) found that “the shield which e-mail can provide might also reduce bias stimulated by the appearance of the interviewer” and because CMC is viewed by some as less intrusive than a face-to-face interview, plus CMC’s nature of permitting a certain degree of anonymity and distance, participants might “[be] more likely to admit to socially undesirable behavior.” Since we are seemingly bodyless and placeless on the Internet, such flexibility also offers a status equalization effect where participants are more likely to have a democratic conversations, and conversations are more likely to reflect their real thoughts (Dholakia & Zhang, 2004). In other words, CMC might allow us to be less judgmental in appearance and more forthcoming in providing stories as a way to reach across space and distance.

### *The Challenges*

At the same time, CMC as an interview medium is not without its inherent challenges. Many researchers believe that CMC should not be regarded as oral nor written but a language with its own characters (Dholakia & Zhang, 2004; Moss & Shank, 2000). CMC forces us to re-structure our consciousness, and therefore demands a new way of thinking about doing research using CMC. For one thing, CMC requires certain computer competency on the parts of both the participants and the researcher. Beyond the technical skills is the “soft” skill of ensuring co-operation and interaction, something common to all qualitative research in general but CMC research in particular. When the interaction lacks all the physical body and visual cues, how do we encourage continued participation? “ A balance has to be struck between putting too much into any one e-mail,

which might lead to stalling. On the other hand, having too many e-mails might lead to interview "fatigue" (Bampton & Cowton, 2000). The chunking and sequencing of questions might be particularly important in a CMC interview. The flexibility in time might also cause problems. When participants have too much time to consider their response, such "thoughtfulness" might lose spontaneity which could be the basis for the richness of data collected in some face-to-face interviews (Bampton & Cowton, 2000).

Furthermore, the distance between interviewer and interviewee might reduce the richness of the messages that pass between them, opening up an increased yet unnecessary possibility of both ignorance and real misunderstanding when compared with the face-to-face interview (Bampton & Cowton, 2000). Additionally, one of the most difficult issues in using CMC as a medium of conducting field research is the authenticity of the participants. How could we be sure that people are who they claim to be? Or, does it matter? asked Dholakia and Zhang (2004). The authors suggested that the way to "authenticate" our participants might be "based on the social context ... interact with the informants long enough and extensively enough." (p.4) However, they also argued that "identification of the informants may not even be necessary" because after all, "the personae inhabiting cyberspace indeed are the authentic 'subjects' that populate such virtual spaces."

### Coming to Know my Participants

Through my involvement with OOPS, I came to know several volunteers: Arnold, Filestorm, Doris, Jessie and Luc. Luc, the OOPS trailblazer, held unique knowledge about this project that no one else could have. I gained his consent to participate early in the study and conducted five interviews, exchanged hundreds of emails and participated



in countless online chats with him. He provided OOPS internal documents to me, and we have co-authored articles. I even helped with one of his proposals for an award competition. Jessie, a second research participant, edited my translation, and I came to know both Filestorm and Doris, my third and fourth research participants through working with them on the transcribing project. I had informally communicated with all of them before I invited them to join this inquiry. From over 1,000 OOPS volunteers, I selected these four people because I had already established communication with them, and I was no longer a stranger. In selecting them, the opportunity to learn is of primary importance (Stake, 2000). By inviting someone whom I already knew gave me confidence and made my entry to them easier. Arnold, my fifth research participant, drew my attention due to his active participation in the online forum. I did not have any personal contact with him prior to this research inquiry. I now introduce my participants.

*Arnold: The Magic Thing that Can Change the World is Education*

Arnold was a teacher at a university in a small town in southeast China. He had been teaching Marketing and Business English after receiving his bachelor's degree. Unlike all other participants, I had no prior direct contact with Arnold when I invited him to participate in this inquiry. However, I noticed him in my reading of his online postings. Arnold was quite active in posting and responding online. His postings revealed to me that Arnold not only joined the project quite early, but he had stayed with the project since. Early on I asked him about his Internet experience and he replied via email, "I am an old net worm with almost eight years of experience, but the online discussion (bbs, irc etc) experience is limited to mainly bbs. I believe this is a good place for showing

people's ideas and opinions. It should be a nice cyber-place and may replace the classroom in cyberspace when one day we move our education to net.”

Through many of Arnold’s online self disclosures, I knew he was a teacher. When asked why he decided to volunteer, Arnold revealed that “I am a teacher and am from a teacher's family. I do think the magic thing that can change the world - even the universe - is education or change, by which human beings will do something good or better.” How has Arnold’s “teacher family” background influenced him? In the next email Arnold shared:

My grandfather on mother’s side had been a teacher before he joined the Red Army and before he died several years ago. One of his wishes for me was that I should be a good teacher. My parents were both working in college but due to some reasons my father thought that a man living in a campus surrounding will devote more to society than a man living in a bureaucratic organization, and of course this experience and his teaching career of over 30 years influenced me a lot. These two men are not rich people, but they influenced a lot students as well as ordinary people, and I think a powerful man should be the one who can influence people and change people instead of earning money ONLY. A man with money but with no heart for the benefit of society is absolutely a poor guy. I never look down on money, but a saying goes like this: if the problem can be solved by money, then it is not truly a problem.

When I saw Arnold mentioning “money” in this message, I remembered that in his previous email he had emphasized the importance of a “clean” project in which money should not be involved. In that email, Arnold wrote,

I think education can be labeled as being holy or sacred, and thus a project like this cannot be motivated by MONEY. Moreover, MIT created MITOCW without any purposes of earning money even in this money-driven world. Lucifer quit his job and devoted himself totally to the OOPS project and his call for volunteers to join should and must be respected. If the project becomes connected with money or money related issues, I think OOPS will not remain CLEAN, and the holy task will inevitably degenerate and take off on other, less noble paths. I understand that no

organizations can operation without money. What I wanted to emphasize here is that we should try not to let commercial motives influence the path of OOPS.

What a profound thought from Arnold. I was eager to learn from this teacher, who considered himself from a teachers' family, and who believed education is the change agent for the betterment of mankind.

*Doris: Volunteering is a Way of Giving and Personal Cultivation*

I got to know Doris through the transcribing project I coordinated. As part of my volunteer work facilitating that project, I often sent email reminders – I called them friendly checkups – to volunteers and asked them to report on their progress. In responding to one of those emails, Doris revealed to me that “The other day on tw.ocw I read your article about your volunteer work for OOPS from a Buddhist's viewpoint. As a Buddhist myself, I could not agree with your thoughts more.” She was referring to a Chinese article I wrote about my view of Buddhism in today's information age. In that article, I imagined if Buddha was still alive today, he would have used the Internet to spread his teaching and how much faster it would have spread. I viewed OOPS volunteers performing a task of giving for the betterment of mankind, through the utilization of the Internet; therefore, I regarded them as practicing Buddhism in a unique way. I felt an immediate bonding with Doris when I read this email. Later in our e-talk, as Doris called our email conversations, she told me about her initial thought about OOPS. In her own words, she referred to my article again.

It's really a brilliant idea. It seems impossible to accomplish such a huge project with only volunteers' help and devotion, but the result and response are very positive and encouraging. I've read your article on OOPS's homepage introducing such a project and concept on a Buddhist magazine/newsletter. I totally agree with your thoughts. As a Buddhist

practitioner myself, I see my involvement as a way of giving (布施) and personal cultivation.

Doris was born and raised in Taiwan, went to the U.S. for part of her undergraduate program and her masters degree in linguistics. She then returned to Taiwan and taught English for several years before marrying a Malaysian whom she met while studying in the U.S. Doris then moved to Malaysia and was helping with the family timber business. She often told me that she missed being a teacher. For example, she told me that, "The sense of personal achievement and satisfaction I got from teaching are very close to those that I feel from my participation in OOPS." She also said, "you can see that my past work experience before getting married is all about teaching. Today I still love and enjoy my past teaching experience in different places with different levels/races of students."

One of the reasons I invited Doris to join this inquiry was that she had translated five courses and edited seven when she joined my study. For someone like me, who had struggled every step of the way to come up with the translation, what she had done was impressive. She described to me what it was like to be an editor in OOPS.

I feel editing is the most challenging because I always try to keep the translator's original work intact as much as possible without making too many modifications as a way of showing my respect for their work even though several of the translated pieces that I edited really need some major revisions. I simply don't want to discourage any volunteer, but at the same time I have to focus on the accuracy and fluency of the piece. I guess you can call it a "professional habit/drawback" of a teacher to maintain the level of quality of her work. Too bad that I still can't get rid of it even though I no longer teach. HaHa!

Doris was the only participant who would forward me Internet emails with jokes and articles. Maybe our sharing of a common bond as Buddhists facilitated our initial engagement.

*Filestorm: I Strive to Do Something for My Country and People*

Filestorm was a second-year college student in the School of Electronics, Information, and Electrical Engineering. I got to know him through the OOPS spin-off project, OOPS Transcribing, where volunteers transcribe video lectures into English texts. I was the project coordinator, and he was one of the volunteers. He quickly made his presence known.

I had coordinated the project for several months when Filestorm joined in February 2005. This spin-off project had made little progress at the time due to the inherent challenge of transcribing. I generally spent about six to ten minutes transcribing a one minute lecture, but Filestorm was different.

First of all, Filestorm volunteered to transcribe nine lectures at once, something no one had done before. On top of that, he finished three lectures, forty to fifty minutes each, three days in a row, in a production speed that was unmatched by others. When asked via email why he decided to volunteer, he shared with me his passion for Linear Algebra, the course he transcribed, and his respect for Dr. Gilbert Strang. Filestorm told me that while staying at home, he prepared a reading list for himself. He read books in the field of neural networks and felt he might be able to comprehend concepts but would not quite get at the deeper meaning behind them. He believed this bottleneck reflected the high mathematical competency required in understanding neural networks in particular but also exemplified the way math is taught in China in general.

In China, engineering materials tend to emphasize too much of the method itself rather than the concept and theory behind it. A method without its supporting concept and theory loses its beauty and therefore becomes difficult for students to remember. Some educator once said that education is to forget everything you were once taught. What is left is education. But the problem is, there seems to be nothing left after cramming for exams three days prior and after memorizing all the formulas that do not make sense. This kind of education is meaningless.

While searching for Linear Algebra materials on the Internet, Filestorm came across the OOPS web site. When asked about his motivation of joining, he described:

Pure acquisition of knowledge should be above all commercial profits, including any personal profits. For example, I am transcribing but I don't feel I am wasting my time. Instead, I sincerely feel I am contributing to something meaningful – my work could help satisfy hundreds and thousands of people, like myself, with the desire to learn.

Filestorm was the first OOPS volunteer to add me to his MSN messenger. From time to time, he would initiate the conversation and we would talk about different things. For example, in this online chat, I asked about his nickname – Filestorm. It turned out there was a story behind it.

grace	filestorm	Just a quick question. What does "filestorm" mean? How did you come up with this nickname?
filestorm	grace	I was a hacker in middle school
grace	filestorm	Oh! and filestorm?
filestorm	grace	So I got myself this name file = computer;pertaining storm = making turmoil
grace	filestorm	Interesting. so you have kept that name since?
filestorm	grace	Yes.
filestorm	grace	I became known for that name
grace	filestorm	Aha, among your school mates?
filestorm	grace	Not only among school mates
filestorm	grace	Principal, network administrator
filestorm	grace	Computer teacher once prohibited me from walking into the computer room
filestorm	grace	Said "you are a dangerous person"

filestorm	grace	:P
filestorm	grace	You can find some information on Google about me
filestorm	grace	In middle school, I was hacking others
filestorm	grace	In high school, I turned to the bright side
filestorm	grace	doing network security
grace	filestorm	Turn to the bright side, very funny.
filestorm	grace	If I uncovered a security hole, instead of using it myself
filestorm	grace	I reported
filestorm	grace	I once stole my teacher's account
filestorm	grace	but I am fundamentally an honest person
filestorm	grace	I saw the final exam document
filestorm	grace	But I did not open it
filestorm	grace	I stole it for the sheer feeling of accomplishment
filestorm	grace	Plus someone else was in competition with me, so I was more motivated
grace	filestorm	I can see you being a smart ass! trouble maker turns "good" :P
filestorm	grace	In high school
filestorm	grace	I was the best in network security :P)
filestorm	grace	So I thought I should do something
filestorm	grace	So I created the NetLab, a network security club in school
filestorm	grace	Assigned myself the chief of the club
filestorm	grace	:P
grace	filestorm	You cannot see me or hear me (the limitation of computer-mediated communication), I am enjoying your story!
filestorm	grace	Ya, close my eyes and I can imagine.

May 2, 2005.

Filestorm claimed that he was very patriotic to his country and was concerned about China's future. Even though he despised the exam system, the education system, and the way everyone practices for tests, he shared with me in his email that "he would continue to strive to do something for my country and people."

*Jessie: Knowledge is the Shared Experience of Humanity*

Jessie was a part-time lecturer at a west Australian university. Born and raised in Taiwan, she later moved to the U.S. Jessie then obtained two master's degrees, one in Nutrition and Food Science, another in Information and Computer Science. She then

worked for IBM for a while before moving to Australia. She continued to work for IBM for two years. Later she decided to be a part-time lecturer so she could spend more time with her children. Jessie's online record showed that she registered with OOPS on June 6, 2004 and had since posted 198 messages to the discussion. She appeared very interested in helping others in the forum solve translation-related issues. She posted often in response to those questions and seemed to be able to come up with a translation no matter how difficult it might be. She also made an impression on me through her directness online. She was not afraid to voice her opinion, even when it was one not shared by many. In one of her online postings, she offered her point of view on how translators should not impose their own opinions during translation:

Respecting the original should be strictly followed. We are translating others' intellectual property. I would mind, or even object to, someone changing my lecture notes without consulting me first. What reliance could anyone place on the accuracy of a translated work if the translator was free to change the original?

There is plenty of room for discussion. While one may not necessarily agree with everything that one is translating, one needs to respect the original just the same.

Translators perform a technical task not a creative one. We are there to render something from one form to another, not to create something new. In a sense we are like the PC on which I am now typing. It translates my thoughts to text. I would have it repaired if it started inserting text which I didn't type.

In one of our email conversations, I asked her about this specific posting. She stood her ground, "Translators perform a technical task not a creative one; however, I have the impression that not many agree with this point." She continued, "some seem to think a translator can introduce their own opinion of the work or correct what they consider a mistake at will. This is simply wrong!" It was not until much later when I



asked her about her teaching experience that she revealed to me her toughness and rebelliousness:

I was not a good student. During school, except for few teachers whom I adored, I was as rude and arrogant towards all my teachers as I could get away with. I knew that some of them were literally frightened of me. I was a tough student!

I never planned to be a teacher for fear of encountering any student like myself. My teaching position is more an accident than anything else. It just dropped on my lap when I had enough as a computer programmer.

I found this new information to be intriguing. In my reply, I wrote:

I laughed very hard when seeing this sentence, 'I never planned to be a teacher for fear of encountering any student like myself.' It is said that what goes around comes around. Hope that is not the case for you. :-)

I also took this email as a positive sign that Jessie felt comfortable enough to share with me this side of her character and personality. More importantly, I could not help but link her toughness, as revealed in her email to me, with her directness, as I observed in her online postings. Personality penetrates through the Internet, does it not? I asked Jessie what she meant by being "tough" and she wrote:

I am assertive and do not take b.s. from anyone, without exception. That can be sometimes downright irritating and intimidating to others. I fear no one and nothing. Once I form my opinion on something, it isn't easy to sway me. That's the way I have been as long as I can remember. That's why I said I am tough.

When asked what the experience of reading and participating in online discussion was like for her, she answered:

It has been a pleasant experience to share what I know, however insignificant it might be. Knowledge is not the property of individuals but the shared experience of humanity. I feel that everyone must feel free to

contribute to it and should refrain from disparaging those who do. I had the experience of contacting two authors of course material in order to clarify difficult points in the online discussions. Both authors were extremely humble and helpful, which encouraged me to put in more effort on this project.

## Negotiation and Ethical Considerations

### *Negotiating Ways of Communication*

For the first one to two weeks, I initiated our research relationships by communicating with my participants through emails. I also gave my participants the option to Instant Messaging (IM) with me if they preferred. I first asked all of them the same set of simple open-ended questions and asked follow-up questions when necessary. I hoped this arrangement would provide a necessary warm-up period for both me and my participants to get to know each other, to get a feel of each other's communication style, and to obtain initial trust and rapport. This period was extended or shortened based on my sense of whether a particular participant was ready to have in depth conversations with me.

After the warm-up round of communication, I tried to negotiate a fixed interview schedule with them where I would call them either on the traditional telephone or via Voice-over-IP software (Skype) and listen to their stories about their experience with OOPS. Filestorm, Jessie and Luc preferred to continue to use email or IM as the primary way of communicating with me while Arnold and Doris tried Skype. Our engagement lasted five months, from April 2005 to September 2005. I tape recorded all interviews and later transcribed them into text. All Skype conversations were conducted in Chinese;

however, the transcriptions were directly translated into English by me. This transcription document then was sent to each participant for member check and feedback.

The strength of recording the conversations is threefold. It allowed me to focus on the content of the conversations during the interview instead of record keeping.

Therefore, better probe questions might emerge as I listened intensively to a participant's response. Freeing myself from record keeping also allowed me to be a more active participant in the conversation. Secondly, once recorded, I could visit and revisit the conversations countless times, allowing the search for confirming or disconfirming instances. Lastly, repeated listening to the conversations permitted me to experience the same contents vicariously and different perspectives might emerge as a result. During this time, I continued to observe the activities displayed in the discussion board but paid special attention to threads involving the participants.

#### *Role of the Researcher*

I began this work as an OOPS participant, and then became a researcher. My involvement with OOPS provided the insider lens and natural contact with other members. In other words, I am a "complete-member researcher" (Angrosino & Perez, 2000, p.677). I was privileged since I had the ability to better understand the context in which OOPS members lived. On the other hand, I was also alarmed with the potential danger that my "taken-for-granted" could completely blind me to certain aspects of what happened (Angrosino & Perez, 2000). Since in qualitative study, I, the researcher, am the instrument of the study (Eisner, 1998), coming to understand and interpret how participants form concepts in the social settings would be in the spotlight for scrutiny.

In terms of the online discussion board, I continued to be an active participant through this inquiry, the way I have always been since I joined this project. I have publicly asked for help (for example, thread #410 where I asked how to translate “the coin of the realm”), provided help (for example, thread #551 where I answered what Steller system is), raised tough questions (for example, thread #584 where I suggested two separate FAQs for volunteers and learners), voiced my agreement (for example, thread #646 where I agreed OOPS is for all Chinese and Taiwanese), and expressed my disagreement (for example, thread #352 where I voiced my dislike of the name OOPS). I continued such involvement as it was an integral part of my personal engagement with OOPS.

In terms of the relationship with my participants, I managed to establish an honest and open rapport with them. Because Luc is a public figure, his identity could not be concealed. All other participants had the choice of using their real name, or using a pseudonym of their choice. All of them gave me a name they chose to use in this current writing. I kept in touch with them via email, online chat, periodic interviews and any other ways available to us. All documents written by me about them were shared with them, and their feedback was solicited.

To sum it up, from the broader sense, my role as a researcher was to listen to my participants’ stories, to tease out the meanings behind their actions (behaviors as well as intentions), to offer my interpretations of their stories, and to foster a meaningful relationship with each one. In this relationship, I also tried to make myself useful to OOPS and to my participants. The fact that I was the coordinator of a spin-off project allowed me to put additional effort into OOPS, in addition to the direct contact with other

volunteers. I considered that I had put myself in a win-win situation where I could be helpful and be the researcher.

### *Ethical Issues*

Of the eleven hundred courses available from MIT OCW, I deliberately picked “HST.502: Survival Skills for Researchers: The Responsible Conduct of Research” to translate. My concern about ethical issues reflected on my concern for researcher integrity. I wanted to do no harm to my participants, and I strictly followed all human subjects guidelines set by my university. I was also committed to share all written documents with the participants. I was fully aware that, by doing so, I might run into situations where my values, beliefs, and assumptions were in conflict with those of my participants. As a result, I knew I might need to be more careful about word choice and how I presented and interpreted their views. However, I considered such a dilemma unavoidable. By confronting it rather than avoiding it I demonstrated my sensitivity in being an ethical researcher. I considered my participants my first audience of the written research text (Clandinin & Connelly, 1994), keeping in mind that we should do no harm to them.

In addition to the general ethical issues most qualitative researchers face, this study added an additional dimension to the ethical challenges because it used the Internet as a means of conducting research. The issue is particularly troublesome when quoting messages from a public discussion forum. It raises the question of privacy and ownership of that message (Romiszowski & Mason, 2004). To obtain informed consent from people from whom messages were quoted is not practical. Especially in OOPS, a large amount of information was posted anonymously, making it impossible to trace the text back to

the originator. Some believe since the public information sits in the public domain, they are free to be referenced (Herring, 1996; Moss & Shank, 2000). Others contest that just because the data is public, we cannot conclude that people have waived their right to remain anonymous. Schrum (1995) proposes an eleven-item guideline for the conduct of ethical Internet research. Item nine stresses the importance of masking the origins of the information, “unless express permission to use identifying information is given” (p. 324)

Not only is there a split in regard to whether and how researchers obtain consent for discussion board messages, there seems to be no agreement on whether and how researchers obtain consent for online participant observation (Mann & Stewart, 2000a). Garton et al (Garton, Haythornthwaite, & Wellman, 1999, p.93) made a parallel comparison to some of the common practice in face-to-face context and asked:

Must researchers identify themselves if they are only participants in the electronic equivalent of hanging out on street corners or doughnut shops where they would never think of wearing large signs identifying themselves as “researchers”?

However, one thing all researchers seem to agree on is this: decisions about online ethics remain the responsibility of the researchers (Mann & Stewart, 2000a; Romiszowski & Mason, 2004; Sharf, 1999). Going back to the fundamental reason for ethical considerations in research is the interest of doing no harm in the field. With that in mind, I made a decision to use pseudonyms for all public messages, except the ones posted by my participants.

#### Sources of Field Texts

My study involved the collection of field texts from two sources – people and artifacts. As Mishler (1979) said, “human action and experience are context dependent

and can only be understood within their contexts” (p. 2), we have to include the discussions on the discussion board and interweave those narratives into the narratives of participants’ storied lives. Text-based online transcriptions provided the background landscape where individual experience and story lived. There were several sources of field texts that I will explain next.

*Background: Observation Journals as Field Text*

As a regular participant in the discussion board, I documented my interactions with the members, my reflections on those interactions, and my observations of the happenings. Observing the discussion board provided both the human activities and the physical settings in which activities took place (Angrosino & Perez, 2000). Since all postings on a public forum, such as the ones in OOPS, are considered public information, I did not need to obtain anyone’s consent in using information available. In this case, participants’ voluntary responses were as close to a “naturalistic setting” as any situation. Members would not be sensitized to my existence; therefore, we might conclude that what they said represented what they wanted to say. This observation went from general to specific to eventually selective observation as the aim of the research became clearer.

*Background: Primary Data as Field Text*

In addition to the information available on the discussion board, there were many other primary documents that were available to me. These sources included the project web site, which contained volunteer information, translation updates, and any related news information. Newspaper and TV reports on Luc or on OOPS, Luc’s personal blog, and the status report prepared by Luc were also readily available to me. These field texts provided yet another angle to the context of the project.

*Foreground: Conversations as Field Text*

In my research, I like to think of my interactions with my participants as conversations rather than formal interviews. To be more precise, there were a series of friendly conversations instead of formal interrogations. In this notion, I stressed our relationship as an equal one in which I listened and cared for their experience, allowing them to direct the flow and content of the conversation. This did not mean that I lost sight of my research agenda and my role as a researcher. It meant that I skillfully and slowly introduced new elements into the conversations to assist participants in responding in the direction of the research question (Spradley, 1979). I made this distinction between a conversation and an interview to focus on my efforts on an open-ended, informal format where the participants' voices were in the spotlight.

I also saw this interactive process as a form of storytelling in that “the story is the what in a narrative, the discourse is the how” (Fontana & Frey, 2000, p.664). I paid special attention to both what was said and how it was said. I asked probing questions and allowed turn-taking. I used a tape recorder to record the conversations and noted the particulars of its contextual environment such as the medium of communication, time and place.

Fontana and Frey (2000) suggested that I, as a researcher, should avoid “real conversations” where I would express my personal opinion or answer questions asked by my participant. I disagreed with such a notion. In order to build rapport and trust, I, as a researcher and a real person, needed to show my human side. I was mindful of not being judgmental and confrontational but allowed the unstructured conversation to be presented



in its entirety. This belief led to the next notion of what Fontana and Frey (2000) called “negotiated text.”

### *Foreground: Co-Authoring as Field Text*

As the collaborative relationship between my participants and me took shape, my participants had as much power as I in shaping the research agenda. My belief that meanings are contextually grounded and jointly constructed was congruent with my research question. Therefore, in order to answer my research question, I had to allow my participants to negotiate their stories with me and see this process as a “negotiated accomplishment” (Fontana & Frey, 2000, p. 663), in which my renditions of the stories were deconstructed and intertwined with those of my participants within the context and situations in which they took place. This way, it might be easier to draw the readers into both the experiences of me and my participants.

### Data Interpretation

Using Clandinin and Connelly’s three-dimensional narrative inquiry space, I planned to focus my data analysis on how participants’ experience with OOPS was shaped by their past and current life stories, locating such influence between their life in the world and the life in the cyber world, drawing upon their personal reflection and their social interaction with others, and taking the individually and socially shaped experience into the future. In other words, data interpretation focused on linking foreground and background information into a cohesive whole, nested in a process of “broadening, burrowing, and re-storying” (Connelly & Clandinin, 1990, p. 11). Broadening occurred when I cautiously generalized in providing a bigger picture of a person, an event, a theme, or such. Burrowing happened when I focused on one episode, for example, and

dug into many interrelated components in providing a more detailed account and description of the event. Re-storying required that my participants and I move back and forward several times as we reflected on what was shared and gave new meanings to those shared stories.

I took an inductive approach, in that all generated theories were grounded in the data by continued interaction with the understanding of the data being analyzed. I began data analysis along side data collection. By doing so, I could progressively focus my observation and conversations, and gained theoretical sensitivity. Erickson (1986) called this process “progressive problem solving” (p. 143). I planned to use the approach - contextualizing strategies to look for relationships connecting statements and events within a context into a coherent whole (Maxwell, 1996, p. p.79).

Stories are essential meaning-making structures, and “narratives must be preserved, not fractured... we must respect participants’ ways of constructing meanings and analyze how it is accomplished” (Riessman, 1993, p.4). In this light, the more traditional coding and categorizing of the data could only further fracture such meaning structure and therefore was not used in this study. I also paid particular attention to “how participants in conversations impose order on the flow of experience to make sense of events and actions in their lives” (Riessman, 1993, p.2). In this sense, I analyzed how participants drew upon personal and social resources to their stories together in the three dimensional narrative space. In other words, I was interested in why story was told that way.

Overall, I took an interpretive approach as proposed by Erickson (1986). I treated all assertions and theories as tentative. Here, I put my influence as the author up for

scrutiny. When field text was written into research text, the confessions made in my personal journal provided readers the awareness of such effect and allowed them to draw alternative conclusions. In addition, I searched for the entire data corpus for confirming and disconfirming instances. I paid attention to the frequent as well as the rare cases. I grounded the internal generalizations with particular evidences, the evidences that could provide the concrete for the abstract (Erickson, 1986). I valued the point of view of my participants yet made my own interpretation implicit. The ultimate goal was not to prove but to provide plausibility.

### Validity Issues

When I think of the validity of a qualitative research, I do not associate it with truthfulness, in the sense that there is an ultimate truth to which my study could be compared. First of all, all “truth claims should be translated into validity claims” (Carspecken, 1996, p.56). In addition, narrative assumes point of view because “facts are products of an interpretive process; facts and interpretations require and shape each other” (Riessman, 1993, p.64). Therefore, a qualitative study should focus on three types of validity: thick descriptions, systematic interpretation, and plausible and alternative explanations (Maxwell, 1996). Thick descriptions could be accomplished by the recording of various field texts, as mentioned earlier. To achieve systematic interpretation and alternative explanations, I intended to focus on two concepts: trustworthiness and vicarious experience.

### *Trustworthiness*

Generally speaking, the validity concerns of trustworthiness in a qualitative research centers around two issues: bias and reactivity (Maxwell, 1996). Others relate

trustworthiness as credibility and authenticity, but I prefer to refer to the term “researcher subjectivity” as a way to include the values, beliefs, and assumptions I brought into the research. Eisner (1998) referred to the presence of researcher’s voice in text as one of six features of a qualitative study. Clandinin and Connelly (2001) emphasized the importance of the researcher displaying his or her signature on the work. Peshkin (1985) seemed to share a similar view as he wrote:

... when I disclose what I have seen, my results invite other researchers to look where I did and see what I saw. My ideas are candidates for others to entertain, not necessarily as truth, let alone Truth, but as positions about the nature and meaning of a phenomenon that may fit their sensibility and shape their thinking about their own inquiries. If somehow, all researchers were alike, we would all tell the same story (insofar as its non-denotable aspects are concerned) about the same phenomenon. By virtue of subjectivity, I tell the story I am moved to tell. Reserve my subjectivity and I do not become a value-free participant observer, merely an empty-headed one... (p. 280)

In addition to separating explicitly what were my interpretations and what was the original data, I believe by honestly acknowledging the existence of my subjectivity, the readers understand how such subjectivity influenced the process and conclusion of the research.

Reactivity refers to the influence I had on the settings, moods and feelings of my participants. This is a powerful yet inescapable interaction because what my participants say is always a function of the interviewer and the interview situation (Fontana & Frey, 2000; Maxwell, 1996). The goal in dealing with this validity threat was to understand its influence and acknowledge it accordingly and openly. Trustworthiness is different from truth because “the former moves the process into the social world” (Riessman, 1993, p. 65), making it an interactive process. In addition to my prolonged engagement with the

research, and my persistent observation focusing on details of the elements of interest (Glesne, 1999, p. 151), trustworthiness in a narrative work could be established by four approaches: persuasiveness, correspondence, coherence, and pragmatic use (Riessman, 1993)

“Persuasiveness” centers on the concept of plausibility and, as I had stated earlier, all theories developed were tested and retested, and all possible alternative explanations were teased out. Participants were part of this process as they read and re-read my write ups. The constant search and re-search for confirming and disconfirming instances helped build the robustness of the interpretation as well. “Correspondence” refers to member check; “Coherence” emphasizes the documentation of repeated themes; and “Pragmatic Use” asks the researcher to provide thick data sufficient for others to replicate. In other words, the amounts of evidence, the variety in kinds of evidence, and the linkage between analogous instances of evidences enabled me to refine and adjust major themes and their theoretical assumptions. The ultimate goal for me was to provide a cohesive interpretation that allowed readers the vicarious reading experience.

#### *Vicarious Experience*

Narrative inquiry does not involve a large number of participants because we were looking for depth rather than breadth. In this light, a narrative inquiry’s primary focus was not with generalization but of particularization (Eisner, 1998). The goal of my research text was to assist the readers in constructing their own understandings and inferences by providing opportunities for vicarious experience. When readers constructed their own knowledge about the particulars with OOPS, they made a “naturalistic generalization” (Stake, 2000, p.442), their addition, subtraction, invention and re-

construction of what was written. Readers should be able to vicariously experience the setting described and to confront examples of key themes from their own perspective and understanding. With the aid of the thick descriptions of the particulars, readers will also be able to survey the full range of evidence on which I drew my interpretation. Allowing readers access to all these elements enables them to be the co-analyst of the narrative (Erickson, 1986). Trustworthiness was established by creating such vicarious experiences for the readers. In particular, trustworthiness was created because “experience has a wholeness and an integrity about it that is neither left in the field nor on the pages of a field text but is alive at the end just as it is in the beginning” (Clandinin & Connelly, 2001, p.189). My narrative accounts of the events will offer possibilities for the readers to relive the experiences while creating their own experience in the process.

#### Potential Contributions

There are three potential contributions this research adds to the body of knowledge in online community building, development, and narrative inquiry. By understanding participants’ experience in an informal online community, this knowledge helps provide an alternative platform in examining the meaning of teaching, learning and education outside the realm of academia. The line between formal and informal education blurs with the advancement of the Internet, which is becoming the platform of globalized eLearning. This research study could help online communities understand how collaboration and communication are experienced and could be facilitated in a culturally and socially responsive way.

The second contribution rests on the attempt to document the development of a highly unique project and its volunteers within the current movement of Open

Educational Resources (OER) and Open Courseware (OCW). This research is one of the first attempts to look at the global OCW movement from a different cultural context. In addition, this research will provide a rich understanding of the practical application of OCW materials from the users' perspective, a view not well documented and not well researched.

The third contribution is to the research method – narrative inquiry. The inevitable distance between me and my participants not only created an uncomfortable anxiety in me as a researcher and unsatisfactory details as I gathered their stories, this situation also reflected the challenge of getting to know participants' storied experience at a distance. This is an uncharted territory, something narrative inquirers will encounter as online communities become the norm for how people learn and experience education. Documenting the experience of an “online” narrative inquiry makes a significant contribution to the research community.

## CHAPTER FIVE: NARRATIVE OF THE FORMATION

When I joined the project in June, 2004, OOPS had almost 300 volunteers. That number has grown at a steady pace since and, as of November 2005, OOPS had an astonishing 1,700 volunteers worldwide. People might perceive that many online communities grow out of an existing face-to-face entity, functioning as an extension to the already formed bonding. Therefore, many people were curious as to how OOPS was started when OOPS seemed to have been born out of “thin air” without the base of a pre-established network of people. In addition, many people have asked how OOPS has attracted so many volunteers who willingly devote their time for free. There are two questions that have haunted me as I have become more and more involved with OOPS: Why was I so enthusiastic about OOPS? What was it about OOPS that seemed to have captivated me? Maybe what has captivated me has also fascinated many other fellow volunteers. Moreover, many people continued ask me these big “why” questions, as well. I believe there was at least one shared experience among many volunteers: the visit to the project web site.

### Context: Navigation of the Project Web Site

Welcome to OOPS! Figure 4 shows the homepage for OOPS from which many visitors might form their first impression about this project. In Figure 4, Box1 declares the mission of OOPS in clear and concise terms:

We wanted to use the spirit of an open source to challenge the groundbreaking idea of knowledge sharing. Our goal is to let more people enjoy the shared knowledge.



The screenshot shows the OOPS homepage with the following content:

- Header:** 「開放式課程計劃」 OOPS · Open-source Opencourseware Prototype System - Microsoft Internet Explorer
- Navigation:** File, Edit, View, Favorites, Tools, Help; Back, Forward, Home, Search, Favorites, AutoLink, Options.
- Address Bar:** http://www.twocw.net/index.htm
- Main Header:** OOPS 開放式課程計劃
- Left Sidebar:**
  - 關於本計畫**
    - 關於「OOPS」
    - 課程更新消息
    - 課程報導
    - 本站報導記錄
    - OOPS 電子報
    - 課程瀏覽選擇
    - 志工報導
    - WIKI 測試系統
    - BLOG 測試系統
    - 英文字幕輸入計劃
  - 麻省理工學院開放式課程**
    - MIT OCW 首頁
    - 關於 MIT OCW
    - 常見問題集(FAQ)
    - MIT OCW 電子報
    - MIT OCW 所有課程列表
  - 約翰霍普金斯大學開放式課程**
    - JHSPH OCW 首頁
    - 關於 JHSPH OCW
    - 常見問題集(FAQ)
  - 猶他州立大學開放式課程**
    - USU OCW 首頁
    - 關於 USU OCW
    - 常見問題集(FAQ)
  - 招募志工**
    - 加入我們
    - 協助翻譯
- Main Content:**
  - OOPS · 開放式課程計劃第一次使用者意見大調查**
  - 歡迎來到「開放原始碼理念的開放式課程 原型計畫」**
  - Welcome to OOPS**
  - 基金會召募全職編輯** (Box 3)
  - OOPS是Open-source Opencourseware Prototype System**，我們的中文名稱叫做**開放式課程計劃**。簡單地說，這是在奇幻基金會 (<http://www.fantasy.org.tw>) 之下執行的一個計畫。我們希望能夠用開放原始碼的理想、精神、社群和技術來挑戰開放知識分享的這個新理念，讓更多的人可以分享到知識。 (Box 1)
  - 麻省理工學院的「開放式課程網頁」**
    - 歡迎來到麻省理工學院的「開放式課程網頁」。這是一個免費、開放的麻省理工學院教材資源網站。我們邀請您來看看目前已經上線的課程。
  - 創作共享 天下為公**
  - 最新翻譯上線**
    - 2005年十月版電子報
    - 380.726.81 免費計劃的問題解決
    - 12.010 2002秋季課程：科學程式寫作所需的運算方法
    - 21F.401 2003秋季課程：德語I
    - 2005.10.30 24.953 2003春季課程：論元結構與語法
    - >>不要再補啦
  - 招募志工** (Box 2)
    - 加入我們。在我們的計畫中，其實最特別的理念就是我們向社會大眾募集的不是金錢，而是各種專業能力。所以，換句話說，基本上各種各樣類型的義工我們都需要！你只要有專長，都可以幫上我們的忙！
  - 說明**
    - 回答你的疑問...
    - 常見問題集(FAQ)
    - 回應告訴我們你的想法... 若您有任何指教或更正，請EMAIL至 [lucifer8@ms25.hinet.net](mailto:lucifer8@ms25.hinet.net) 或至 [留言板](#) 討論與指教。
    - 本站報導記錄
    - 到處都有OOPSer——來自德國的Joyce·楊夏斐 游蕩編譯

Figure 4. The OOPS Home Page

If one reads further down to the bottom of the OOPS homepage, where box Number 2 is located, a statement that solicits volunteers reads:

The hallmark spirit of OOPS is not to solicit money. Rather, we are seeking your expertise. In other words, we need a variety of volunteers! As long as you have a skill, you can help!

It appears that OOPS wants not money but people: together, we can make this happen. The most telling sign of the spirit of OOPS was inside the want ad, as indicated in Figure 4, Box 3. This ad for OOPS was designed to recruit paid full-time and part-time editors and system engineers and was placed at the top of the OOPS homepage. If you click on the link, it takes you to another page that states:

No matter how you look at it, we cannot afford a high salary. We will never go public in the stock market, and we cannot give you professional training opportunities. All we can offer you is an opportunity to change the world, a chance to be part of a world-class project, to help millions of people, and to facilitate the proliferation of free knowledge.

The idealistic view OOPS projects about its mission and how it will be accomplished seemed evident here. I remember reading statements such as those and thinking: “This is so unreal.” I cannot really explain why those statements evoked such an initial response from me. Could it have been because the notion of “changing the world” never crossed my mind when I joined OOPS? I have realized that at first I only saw myself and others as “doing what we can” to “help others” but nothing beyond that. At the beginning, I was not totally convinced that people would be so enthusiastic and compassionate about “making a difference.” Reading statements like those actually gave me goose bumps. Such idealism seemed to belong to another world, not the one in which I live.

## People: Volunteers' Motivation

### *Luc's Motivation*

As I continued to try to understand the motivations behind the OOPS volunteers, I continued to read more information available on the OOPS web site. I read many newspaper and magazine interviews involving Luc, and I read many sentiments posted online from volunteers and visitors. Luc, as introduced in Chapter Four, conceived the vision and concept of OOPS in February 2004. I read about his initial impetus for starting OOPS from the newspaper report cited in Chapter Four, probably the same way many OOPS volunteers did. However, during my dissertation research, I met him three times at three different conferences, which gave me a chance to personally ask him about his motivation.

As it turned out, I did not have to raise the question. People attending our conference sessions all seemed curious to know his motivation. Many times I heard him repeating the same story: he was inspired by a magazine article that described a self-learner attempting to master MIT materials; Luc failed that course two times in college and wished he had access to the MIT materials; he thought knowledge sharing is great; Luc quit his job and has donated his own money to start the project . . . . Many times, people would come up to him afterwards and express their gratitude: "it was so inspirational," "what you did was unbelievable," "what a wonderful idea." But this was only a part of the whole story.

In another magazine interview, Luc revealed yet another motivation to start OOPS. In that article, he credited his success and wealth to the general public. In his view, without the people who spent money buying his books, he would not have become who

he is now. The overnight success made this then 27-year old young idealist reflect on his fame and money. He started a foundation to promote fantasy arts in Taiwan: he wanted to give back what society had given him. When MIT OCW came to fruition two years later, he realized once again that he had a chance to make a difference. He openly said on several occasions at conferences that “I was a very poor student. I am not an educator. I am a translator. So I do what I can do the best – translation.” Maybe this is why Luc viewed OOPS as a “social movement,” and not just from his personal perspective of giving back to society. He seemed also to have transcended his view of social-obligation to the OOPS volunteers as he expressed in the OOPS progress report:

Each one of us who can achieve what we have accomplished today is a direct result of collective resources from our society – the help and/or sacrifice of others. It is our moral and social responsibility to give back to society of what it has provided us – the resource, knowledge and generosity. That is what the volunteers are doing.

I can relate to this sentiment of “giving back” better than to the notion of “changing the world.” Just when I thought I had figured out why Luc was doing what he was doing, he revealed something else to me. One of the *Skype* interviews I conducted with him, I probed him about his motivation, a question I had asked several times prior. I heard Luc’s voice change, becoming less than patient. He told me something he had not told me before, “Society is hopeless and people need to have hope, something exciting for them. OOPS is that hope, that excitement for our society. It brings out the best in people.” Unfortunately, at this point our *Skype* conversation was abruptly disconnected, not an uncommon technical challenge I faced throughout my data collection. I never followed up with him on the notion of hopelessness; however, I continued to think about what Luc possibly meant. In a strange way, I seemed to be able to relate to this notion of

a hopeless society. In my mind, I believed what Luc referred to as “this society” was this world in general but Taiwan in particular. I may not consider Taiwan hopeless even though I can see why many would. Luc seemed to have a very broad vision of what he can do and what OOPS can do. Maybe it was the sense of “inflating” oneself that had prohibited me from embracing the notion that “I can change the world”? In a *Taipei Times* interview, Luc said:

One day I asked myself `did I become a better man for my [wealth]?' The answer was no. I was still the same person ... after realizing this, I decided that a way I could both better myself and others was to encourage people to share information. And it became my goal to share knowledge with others. I'm not making any money. In fact, I'm spending money.

This very tall “little person” who calls himself “the janitor of OOPS” had a big dream. It appeared that Luc’s dream of a better society, achieved through volunteers giving back to it, did not inflate him but had humbled him. “All service is directly or indirectly ethical activity, a reply to a moral call within, one that answers a moral need in the world” (Coles, 1993). Maybe Luc’s big dream is hidden in his moral obligation to the society. He seemed to realize that he is one person involved in something that cannot be accomplished alone. “It is important,” Luc once told me, “that the volunteers feel they are part of something bigger than themselves.”

Another one of Luc’s favorite mottos came from the movie *Band of Brothers*: “I am not a hero, but I worked with heroes.” I don’t know if all volunteers consider themselves heroes. I do know, however, there were many OOPS volunteers. It is important to take note of other “OOPSers”, as we call ourselves.

The best way to meet other OOPSers was online. The online discussion forum was set up the same time OOPS’ project web site was created in February 2004. Many

people posted messages and interacted with other volunteers. In a separate study, I focused on the analysis of those online messages (Lin, 2005). Among other things, I found that May 2004 seemed to be a pivotal time when the number of messages surged. Conceptualizing such a surge as a possible indication of the “take-off” of the OOPS community, I puzzled over the reasons behind it. Arnold, one of my participants from China, once told me that he had seen Luc on television. At the time, I was more impressed by the fact that Arnold can watch a Taiwan television show in China than by the real implication of that event. It was not until much later that the significance of the television show became apparent. When I met Luc in Utah in September 2005, he gave two presentations during which he showed a 30-second clip of the show. Luc showed this clip to demonstrate one of his marketing strategies: disseminate OOPS by way of the mass media. That television show was a popular talk show in Taiwan. Knowing the media culture of Taiwan, I can see how Luc’s appearance on that show effectively drew public attention to the project.

Much more media coverage came after Luc’s initial television appearance. In the early stage of OOPS, Luc seemed to focus his recruitment efforts largely on Taiwan, his home country, which incidentally is also my home country. In addition to the effective use of mass media, Luc created a special page on the OOPS web site called “media coverage” that captured all of the interviews Luc had done. In addition to the web page, Luc also held several face-to-face gatherings throughout the first year, which I suspect played an even more important role in establishing a solid foundation for the OOPS community. Within the first year of OOPS’ inception, Luc organized three meetings in August 2004, December 2004 and February 2005, as briefly explained in the narrative

history in Chapter Two. The December gathering also functioned as the press conference where Luc officially introduced OOPS to the Taiwan residents. He intentionally selected the time right before Christmas because he wanted to present OOPS as a “gift” to society.

Every time Luc arranged a face-to-face gathering, he always created a new discussion thread on the online forum, asking the increasing number of volunteers who could not attend to leave messages. “Tell us who you are, where you are, the reasons you joined OOPS, and your expectations about OOPS,” Luc asked on the initial posting. We can find Arnold’s and Jessie’s postings on both threads nested among many other messages. These postings show the motivations of Arnold and Jessie for joining OOPS, long before I recruited them to be part of my research inquiry. Their long-term participation, as preserved with narrative histories associated with OOPS, made them particularly good choice as research participants.

#### *Arnold’s Motivation*

In response to the August 2004 absentee thread, Arnold told everyone the course he adopted and where he lived. In the same posting Arnold shared his reason for joining:

I had a similar idea five years ago but could not continue due to external factors. I take this opportunity as a way to realize that idea. In addition, marketing is what I like. *Marketing Management* is one of the first textbooks that I studied in college.

In a playful way, Arnold also wrote, “I have always regarded myself as an ugly man. After seeing Mr. Luc, I now finally have gained confidence about myself.”

Changing to a more serious tone, Arnold continued to express his view about OOPS functioning to “make these materials the *treasure bank* for world-wide Chinese; do our best to equalize access to knowledge; use our skills to promote global prosperity; use

technology to create a new knowledge-based society.” In this posting, Arnold seemed to subscribe to the idealistic view concerning how OOPS can change the world.

Arnold again posted his comments in the December 2004 absentee thread. Sharing a similar idealistic view from the previous message posted almost four months prior, Arnold went one step deeper, sharing his view about education and his view about the role he has played in OOPS.

The thing about education is, if there is any effect, we will not see it until maybe several generations later. We cannot see its influence in a few years. As the first institution to make free knowledge available online, MIT is like a band of angels who bring light to this world. What we are doing today is being the ones who steal that fire, the ones who bring that fire to all Chinese. I am delighted to be a thief for once, granted I did not steal much this time. Many people around me believe a successful man is the one who is rich. According to that rule, I am not a successful man. Nevertheless, I think a successful man is one who has made contributions to the progress of mankind. I am delighted to have this opportunity to know Mr. Chu and become one of many successful men, even though I might not be successful enough.

When I started communicating with Arnold later in April 2005, one of the first questions I asked was why he volunteers. In a reply email, Arnold revealed:

... I do think it is a great project that may narrow a digital gap for Chinese people. And more, it will definitely create some particular teaching methods or materials for Chinese students and thus benefit communication between East and West...

I am a teacher and am from a teacher's family. I do think the magic thing that can change the world - even the universe - is education or change, by which human being will do something good or better. Of course the possibility of a bad change is always there, but under most situations humans will change or will be educated to be a better and nicer people instead of deteriorating. I think education can be labeled as being holy or sacred, and thus a project like this cannot be connected to MONEY ...



Arnold continued to share with me in the same email the reason he chose a certain course. “I love Marketing and originally in the night of May 7<sup>th</sup>, I planned to pick Marketing Introduction (15.810) but when I came to pick the course, 15.810 was taken by someone else, so I tried 15.812, Marketing Management, because I once self studied a book by Philip Kotler titled Marketing Management. Now, 15.812 was near its final stage ... so I also finished translating 15.810 for making up my dream...”

Intrigued by what Arnold had written in this email, I immediately sent a follow-up email. Specifically, I asked Arnold to elaborate on why he thinks OOPS could “narrow a digital gap for Chinese people” and why OOPS could “benefit from communication between East and West?”

...let me define China as PRC mainland only, because I don't know much in Taiwan especially its educational situations. I surfed via Net for a long time over seven years and I found a lot via the Net, but they are all in English. Chinese students learn English even from primary school, but they actually get almost nothing from their over ten years of education. I mean the real thing, the creativity, the independence. What they get from the classroom is what was ordered or formulated by the teacher or the headmaster or the class master, etc. If the teacher's post is to create some art work, then we are doing modernized parts instead of creating valuable artwork. Maybe one day, when we wake up, we will find that the Westerners are not far ahead of us, but we are not on the same floor [yet]. The revolutionary thing in education is that the Net is breaking new ground and establishing some new orders. OOPS is now getting some live coals and delivering the fire, very big fire, to China. From my translation experience, I sensed something different, some different viewpoints, methods, etc and I do think these are “gaps” between the west and east.

... the biggest difference between east and west is the culture and some related issues. By translation of MITOCW, OOPS brings to us Chinese people MIT's viewpoint, ideas, opinions and philosophy. If MIT represents the mainstream of western society, OOPS gives us a good gift. I wish in the next stage MIT can get some equally revealing and beneficial

information from OOPS. As I know, MIT wants to get some feedback on using those materials for future research, maybe academically.

Both Arnold and Luc considered OOPS as a “gift” to the Chinese society. I began to see their bigger view about OOPS, a view larger than my original understanding. Maybe OOPS really could narrow the digital gap. Maybe OOPS really could facilitate the communication between the East and the West. Maybe I should listen more to what the volunteers said and not be as bound by the limitations I personally perceived.

### *Jessie’s Motivation*

If it took me a long time to really understand Arnold’s passion and vision about education, I seemed to be able to identify with Jessie’s initial motivation to join OOPS more quickly. Jessie, as introduced earlier, was a lecturer living in Australia. In her August 2004 absentee posting, she wrote, “I have always been interested in freelance translation work, either Chinese to English or English to Chinese. What could be better than joining this project?” I could identify with her fascination with translation work, as that was also part of the reason I joined OOPS. Jessie continued to share with OOPSers her volunteer experience.

It is indeed a humbling experience. A good translation ensures that the ideas expressed by the original author are translated in a way that is natural and easy for the reader in a second language. After I started my translation, I truly appreciated the Chinese saying ‘we realize how little we know when we need to use the knowledge’. I am happy, though, that my typing in Chinese is much improved.... Knowledge is not the property of individuals but the shared experience of humanity. Everyone must feel free to contribute to it and should refrain from disparaging those who do. The only way forward is together, the masses and the elite as one group.

It was a humbling experience indeed. It appeared that Jessie not only enjoyed translation work, she showed sensitivity concerning the challenges of becoming a

competent translator. Through the actual doing of translation, she came to feel that she did not know enough, a form of self-criticism I have experienced myself and have seen exhibited in many other volunteers. Jessie also expressed the idea of being part of something bigger than herself, working with a group as a way of moving forward knowledge sharing. Jessie seemed to intermingle artfully her own interests in translation with a bigger picture of collective goodness in knowledge sharing.

Four months later, Jessie responded to the December 2004 absentee thread and offered something new.

I have been associated with this project for a few months. I originally found out about it through a friend who is an academic in Taiwan. The project gives me a way of helping the Chinese community, even though I now live in Australia. Making the MIT OpenCourseWare more accessible to Chinese speakers will, I am certain, assist in their development.

While working on this project I have had the privilege of communicating with many interesting people in many countries. Our internet discussions over fine points of translation have been very stimulating and have improved my ability as a translator. They have been most enjoyable. It was so enjoyable that I even manage to get my teenage daughter to break away from her busy social activities and to become involved.

I would strongly encourage anyone who feels they have the time and skill necessary to become involved with this worthwhile project. Not only would they benefit from and enjoy the experience, they will contribute to our community.

Many hands make light work!

In this posting, we can see that Jessie had enjoyed her involvement with OOPS through her interactions with others by way of online postings. Jessie liked translation work, and online discussions seemed to encourage Jessie to continue her involvement during this early stage. We can clearly see how she identified herself with the Chinese

community and associated both her own work and the OOPS work in general as a community service. Jessie had always been upbeat in all her online messages, but in this posting, she almost appeared as an activist in the sense that she not only got her daughter involved, she stood on the “soap box” and passionately requested others to participate. Regardless, one thing was clear. Jessie experienced satisfaction during her early stage of involvement. Later, Jessie and I established our email communication in early May. We started our dialogues on the issue of motivation. I asked why she joined. Jessie replied via email,

That Knowledge is not the property of individuals but the shared experience of humanity" has always been a firm belief of mine. When I read “we want to use the spirit of open source to challenge the groundbreaking idea of knowledge sharing--our goal is to let more people enjoy the shared knowledge” on the home page of the TWOCW website, I felt that I had found a way to share what I know with my own people. I would like to think that I have a strong sense of social justice and equality.

Jessie repeated much of the same information she had posted on the forum. However, I was intrigued by what she said about her strong sense of social justice and equality. I immediately followed up with an email and asked her to help me understand her belief better. Jessie wrote back and shared with me,

As someone once said, "Knowledge is power." It is the power every human being needs to improve their own situation and that of their society. It is the power that raised humanity from the Stone Age to the space age.

I believe that this "power" should be made available fairly and equally to all. It should go to those with the will and the ability to make the best use of it, not just to those born to right parents. When it is hoarded by a few, social inequality and disharmony result. In addition, knowledge is one of the few commodities that increases the further it is shared. When retained by a few, it shrinks and

diminishes. When shared by many, their combined efforts help it to grow and evolve in innovative and unpredictable ways.

...

When I was young, growing up in Taiwan I saw a lot of poverty and injustice. This just always seemed wrong to me. I came to realize that, for myself at least, the way to solve these issues was through education and the acquisition of knowledge. As I matured I came to understand that education was the answer for all people, not just for me.

But, where my strong sense of right and wrong comes from, I cannot be sure. It has just always been there.

#### *Others' Motivation*

Luc's, Arnold's and Jessie's narrative accounts of their initial motivation for joining OOPS might reflect the inspirations of many unnamed, invisible OOPS volunteers. If anyone visited the OOPS online forum, he or she would find postings with narratives similar to the ones I have illustrated so far. I like to think of myself as a "practical" person who likes to be "real." Not entirely convinced initially, I was undoubtedly swayed by the overwhelming passion expressed online. The many other postings I read online, and the few illustrated here seemed to demonstrate how the sense of a big dream drew the OOPS volunteers in. Maybe everyone's dream was not identical; OOPS volunteers did have a shared understanding of the broader vision of our work: knowledge sharing. But to illustrate my point, here are some additional narratives posted online during the same period of time in August 2004.

Anonymous 1: Special OOPS experience: I now can appreciate the sweetness after the hard work. There is much hard work involved in the translation process. For one particular chemical term, I looked up materials all over the library, searched exhaustively online, but I just could not find its translation. Finally through the help of another volunteer, I

finally found the answer. The feeling of sweetness after such hard work cannot be described in words. Only I know.

Anonymous 2: I joined OOPS because I regarded translation as an opportunity to review related content.... A friend introduced me to MITOpenCourse and I found Prof. Walter Lewin's many video lectures in Introduction to Biology. I listened to all of it and was very touched by his way of teaching, something I did not expect. I feel many courses should be disseminated. The purpose of translation is to allow many friends whose English may not be proficient to be able to be touched by special teaching methods as I was.

For the future of OOPS, I hope that in addition to preserving MIT OpenCourse's basic characters, we will create our own. We should consider inviting distinguished scholars to create their own Chinese lectures or even video lectures. I also hope OOPS will provide many scholarly activities that allow us to interact.

Anonymous 3: I think I am not going to go to MIT in this life. Therefore, I regard this translation as my opportunity to take a look at what MIT students are learning. Also I like to be able to learn together with people who are interested in this field. Free knowledge should not be limited due to language barriers. I cannot contribute money, so I contribute a little of what I can.

For the future of OOPS: let's take small steps one at a time. Translation may be simple. Creating/maintaining an organic community is the challenging task. I don't want OOPS to disappoint anyone. I also don't want to see this project disappear a year or two later.

Similarly, there were some narratives posted online during December 2004 that were responses to the second gathering in Taipei. People were again asked to share their OOPS inspiration online.

Anonymous 4: In the process of translation, I not only reviewed what I had learned, I learned many new concepts. I have benefited from this activity very much. More importantly, [I found out that] there are many "insane" friends (even though I don't know you now, but I believe we will) who work together. This is such a great feeling!

Anonymous 5: Translations can help Chinese users to access a wide variety of knowledge easier. However, what we are translating here is only

the tip of the iceberg in terms of knowledge. The recruitment of many volunteers in this complex and challenging project, nevertheless, is a breakthrough in bridging the thoughts of “another world.”

Anonymous 6: I just joined this community. Your action accomplishes my dream and gives the world a new hope. This project exemplifies our Chinese’ traditional spirit! I hope this community can bring new aspiration to the world. We can proudly announce to the world: this is a mighty endeavor: knowledge carries civilization. Do not let [civilization] vanish.

Anonymous 7: I felt I was doing something meaningful, so I fully devoted myself without thinking about payment. There are three kinds of immortality: achieving virtue, rendering distinguished service and leaving behind worthy writings. [As an] intellectual, I feel worthy to write more thesis and translate meaningful content.

I followed these postings closely and read them as they came in. Reading these postings gave me a sense of the togetherness in the OOPS community. I can relate to many of the individual remarks: the learning, the sweet feeling after hard work, the feeling of being in a crowd, the sense of social responsibility. I was quite surprised by the intensity of my feelings. However, I experienced another powerful feeling once again during the voting for the OOPS logo in late July through early August 2004.

#### Event: Logo Voting

In June 19, 2004, Luc created a new thread on the OOPS forum titled “Our name.” In it Luc announced, for the first time, the name OOPS. Luc wrote:

... I had a trip to China. What they suggested made sense. The project name and logo are for communicating with others. I contemplated for a while and came up with this name... this way, it is easier to introduce OOPS to others. We are looking for volunteers who are willing to design a logo for us. We could have a voting later. [Once the logo is decided], we can make t-shirts and other interesting souvenirs.

Quickly someone made a suggestion online, “ ... Logo is a form of visual communication. Maybe we could incorporate the image of Taiwan: promote Taiwan to

the world, using the image of tolerance (technology + humanity + beautiful island).”

Immediately after this posting, a volunteer from China posted a one-line message,

“Taiwan is not a country.” I have always suspected that the topic of China-Taiwan would surface. Sure enough it did. Within several hours, Arnold responded,

Everyone stop. If we keep at this issue, there will be trouble. Let’s don’t get to that point. We are from two different places, different social environment, different educational [system], and different political party. However, what we are doing collaboratively is for the benefit of the larger Chinese community, not for the debates regarding the two-China division. Can we leave this discussion out? Let’s not talk politics. We are all Chinese, even if one person is in Singapore, he or she is Chinese. I suggest that the logo should not carry any political implication. Even though this is a Taiwan-based project, its goal is for the global Chinese.

Not knowing what others thought about this issue, I followed these discussions with earnest interest as a native Taiwanese. The next four postings showed agreement with Arnold’s suggestion. Volunteers seemed quickly to put aside the dangerous political debate and focused on the task at hand – logo design. I was very pleased to see that we were able to put aside the political differences and focus on the more important matter. I wondered, however, if and how will we maintain this understanding?

Several volunteers shared their initial design ideas on the forum. On June 29, ten days after Luc’s initial request for logo design, he eagerly asked volunteers to submit their work. That same day, Jessie posted a message on the forum and suggested that, “Once you settle on one design, it is going to be for the long haul. I reckon that you should give it a lot more time.” I had the same thought! Instead of rushing to a design, I agreed with Jessie that we should take our time for the best option. Instead of answering Jessie’s question directly, Luc replied, “Yeah, I also wish to have more choices...:>” Of



course at the time, nobody knew that Luc already had the idea of holding the first volunteer assembly. He wanted to have the logo and the t-shirts available at the gathering.

A volunteer asked Luc to give a deadline, and Luc replied on the forum “one month from today.” That was July 2, 2004. While many designers were scrambling with the most creative design, I could not help but raise my concern. Not only did I agree with Jessie that we should take time with our logo design, I also wanted to re-think the name – OOPS. As one of my first postings to the forum, I had expressed my point of view, citing Jessie’s previous message:

... I have some questions on the name as well. Why do we call ourselves "prototype"? What will we become after the prototyping stage? When will that happen? When it happens, will we change our name again? Or maybe there is a deeper meaning to the choosing of this word?

I thought this project is very straightforward in that we are translating those materials into Chinese. Why do we want to put "Open Source" into the name?

This project is going to be around for the long run. Maybe we should allow ourselves a little more time to come up with more creative ideas? What do you all think?

Evidently, I was not alone. Someone posted a message right after mine, saying, “I agree with you. When I saw the name of the project for the first time, I thought the whole name is too long, and not easy to remember.” Deep down, I did not like the name at all. It sounded childish, and most importantly, it sounded like we were making a mistake: in the sense in which the common expression oops is used. I think there was a language misunderstanding here. When you say “oops!” it is never “oops, I won the lottery,” but “oops, I made a mistake.” Later when Arnold and I talked about OOPS, he told me that when he joined OOPS in May 2004, we did not have a name yet. Arnold expressed that

he “is not impressed with the OOPS name.... if I knew nothing about the project, I might think it is something concerning a cartoon, children, or something like that.”

In early July of 2005, I was still relatively new to the community. I was more interested in what others had to say than what I thought. Luc quickly replied to my posting and offered his detailed explanation:

Let me explain slowly.

First, for those who think the Chinese name is too long, just remember its English abbreviation OOPS, pronounced as wu-pu-si, meaning ai-you.

Second, we are going to continue to introduce new technology and concepts, an idea similar to our accepting continued correction of all our translations. Simply speaking, this project will most likely forever be a prototype, undergoing constant modification. We will never have a final version, kind of like the growing process of an organism...:>

Third, all systems and software used in this project are open source. The co-operative working model also resembles open-source spirit. In addition, in the future, besides translation, we hope to provide our model and platform for other developing countries. Therefore, the spirit and concept of open source is important to our project ...:>

Fourth, this project might incorporate other universities' open courses. We might even promote our own open courses. In this regard, it is not appropriate to add MIT's name to our project name, therefore limiting ourselves to new possibilities.

All these are current ideas. Everyone can suggest more interesting or creative ideas or designs.

I remember being extremely impressed by Luc's answer. I remember thinking: he saw things I could not see. There was more to translation. There were other possibilities in the future. Maybe he did spend some time thinking about the name. Maybe the name reflected his vision. When my eyes were opened by this exchange, I continued to question the way the word “Courseware” was translated into Chinese as “Course.” Ten

days later, I posted another message under the same thread. This time, I openly challenged the translation of “Courseware,”

Now, I just want to clarify one small detail. We translate Courseware into 課程 [course]. Generally, Courseware means the program/system/software (i.e. the web interface) and the materials (i.e. the course contents). We are localizing the Courseware, therefore, we have a Chinese interface and a Chinese content. This is all great. I just want to make sure that I am not misunderstanding the fact that we are putting “course materials” online, not “courses” online. Or are we including all the maximum future possibilities here?

Again, it was Luc who replied and tried to clarify my question. Luc responded to the forum, and he wrote, “Yes, we will have our own course system and interface, maybe including software. We might even collaborate with Taiwan universities to promote Chinese Open Course...:>” Maybe there was more to translation! I would have to wait and see.

Shortly after this exchange, Luc started the logo voting event on August 1, 2004. Using the vote function in the online forum, Luc created a new thread and listed six logos, designed by six volunteers. “Only registered users can cast their vote,” said Luc. This event lasted for ten days, ending on August 10, 2004, right before the August-15 gathering. Since I did not really like the name OOPS because it falls short of being elegant, I felt strongly that we needed to have a logo that could compensate for the “lack of elegance.” I was very impressed with design number four and had openly expressed my approval earlier. During logo voting, I felt compelled to campaign for it, simply because I was committed to OOPS choosing the “right” logo. The six logos were presented on the forum, and they are displayed in Table 5. Right away, people started showing support for their favor logo.

Anonymous 1: If you like #6, please vote for it.

Anonymous 2: I like #2. The Dove symbolizes a skilled messenger flying high in the sky, which pretty much sums up OOPS' spirit.

Anonymous 3: I think the bug also resembles our spirit, a feeling of exploring forward, a very distinct mark.






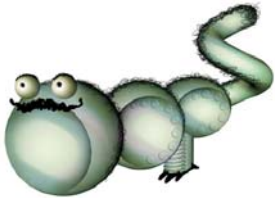
1		2	
3		4	
5		6	

Table 5. List of Six Logos during Logo Voting.

I, of course, wasted no time throwing my support behind number four. I wanted to post my message early on so many people could see my reasons and hopefully agree with me. I wanted to make sure that I gave sound reasons in my message. With a name like “OOPS” the choice of a logo became even more important.

I am campaigning for Logo #4!

This design is clear and elegant. The design uses very simple lines to represent the four characters of OOPS. The font type the creator chooses is

sophisticated, refined and elegant. The logo's overall style has a corporate-looking design.

Why is corporate-looking important?

We all hope this project is not just fun for the moment but will have long-lasting influence. Luc often shares with us his ideas, what we want to do in the future. We should have a forward-looking perspective. We might collaborate with the academic, or maybe research institutions. This project will not be confined to Taiwan and China but will be a project with worldwide impact. Maybe we will be able to collaborate with foreign institutions. If we send out an official document, our envelope and letterhead should be able to represent our sincerity and highlight our energy.

Logo #4 overall is grounded in the attitude that our purpose is solemn and sincere.

I am campaigning for Logo #4!

The designer of Logo #4 also shared with us his design concept in a posting shortly after mine:

... a non-profit organization also needs a strong branding ... on the Internet, branding becomes even more vital. When we do not have a physical place, the network becomes [where] the organization locates. A good name allows members to quickly and efficiently find this organization. ...

... after a good name comes a good visual identification system. A charitable organization's logo should represent the organization's vision. It becomes a totem, encouraging newcomers to join this community.

In my design, the first two characters are "closed," representing the traditional "schools" as the base source of knowledge. The later two characters are "opened," representing the new open spirit and our project spirit...

I chose the color of blue, black, and white, representing the scholarly rigor and enormity of thoughts....

I also designed our slogan – "Creative Commons, All Things for the People" ....

I was reading his design concept but also reading his conceptualization of what OOPS was. I had no idea that the choice of color and the “closed” or “opened” nature of the characters meant something. This was the first time the slogan “Creative commons, All things for the people” was presented. Not only do the phrases rhyme in Chinese, I was impressed that the new west terminology (Creative Commons) seemed to go hand in hand with the old east philosophy proposed by Confucius 2,500 years ago. I tensely watched the progress of the voting, checking the web site every other hour. From the beginning, it was obvious that Logo #6 would be a strong competitor. As a matter of fact, Logo #6 stayed ahead most of the time. In the next few days, many people exchanged ideas, each rooting for their favorite logo. When the voting ended on August 10, Logo #4 won over Logo #6, with a small difference of two votes, enjoying a victory of 53 votes over 51 votes. The remaining 39 votes went to the other four logos. I was thrilled and relieved. “Finally the community prevailed,” I remember thinking to myself, proud of my use of voice and influence in the deliberations.

### Summary

From the beginning OOPS seemed to attract many people, forming a highly unique community of volunteers. By August 2004, OOPS had its name, its logo, and held its first gathering in Taipei. As a participant in the process, I witnessed how OOPS formed its identity and how volunteers embraced that identity. As OOPS developed, I also came to realize that the reasons people volunteer, even though not necessarily obvious, were not the hardest puzzles to solve. How did this community of volunteers work together, how were the efforts coordinated, why and if they continued to work toward a focused goal outside the bounds of hierarchical mechanisms? This seemed like

an even harder puzzle. If it is true that “human beings often have a passionate relationship with their creative endeavors and their work; they wish to share their creativity with others; and value inheres in things other than monetizable rewards,” (Webber, 2004, p.13) then how has OOPS stayed together as a community through its evolution? As the community developed, as the project continued, and as more internal and external elements interacted with one another, tensions began to arise. How was OOPS challenged and how have those challenges help to shape OOPS? That was the next puzzle to unpack.

## CHAPTER SIX: NARRATIVE OF THE DEVELOPMENT

In this chapter, I followed three major themes to unpack the many tensions that arose as OOPS and its members reacted to events and how they evolved to form new knowledge and relationships. The first theme centered on the argument about translation quality where Doris took the center stage. The next theme showed the tensions between two projects as Arnold, a native Chinese, shared with me his view about both projects. The last theme, titled “Why Bother?” narrated the issues about usefulness of translation. I continued my deductive approach in presenting the stories, interjecting my preliminary narrative analysis when this seemed appropriate. Since my primary goal was to let the stories “speak for themselves,” readers are strongly encouraged to form their own interpretations. The focus of this chapter was to show the process of how OOPS and its members react to challenging events. As is typical of almost any complex human stories, many more stories were hidden within the three major themes. When appropriate, I point out some of those less-obvious emerging narratives.

### Narrative about Quality

One of the most gratifying experiences during my research inquiry came when Doris, another of my research participants, emailed me and initiated a Skype talk in early September 2005. For the first time, she - not I - spearheaded a discussion. I felt that if Doris wanted to discuss issues with me, I must be doing something right. Since our first Skype session in late July 2005, we had engaged in four online talks. Except for the first one, each lasted over two hours, and it had been a pleasant experience talking online with Doris. Doris carries the charm of a natural talker; I never needed to really ask any questions. She would just start talking, and all I needed to do was listen and ask probing



questions. I always looked forward to our Skype conversation, for Doris was both a great talker and a fun friend. Doris explained her reason for this Skype talk in her email.

There are two postings about the accuracy and quality control of OOPS's translation work. Have you read the latest posting, or quotations to be precise, about "groupthinking"? This guest seems to imply that OOPS is an interest group like a political party. I don't think he has fairly seen the whole picture from a volunteer's standpoint. Talking is always easy, but taking action is another matter. WE can have a special Skype session to discuss this issue. What do you think? It doesn't have to be on Fridays, though.

We have always scheduled our Skype talk on Doris' Friday mornings. Living in a Muslim country, Doris' home office is closed on Fridays for religious practice. Fridays, therefore, have always been a great time for our talk when there will be no distractions in her office. In this email, however, Doris indicated that our talk did not have to be on a Friday. We talked the very next day.

The posting Doris referred to was initiated on September 8, 2005 by a visitor. The following are some of the messages posted in this discussion thread, titled "whom does OOPS aim to serve?"

Anonymous1: I have a college degree. After reading some of the course materials, I feel these materials are dramatically different from what I have learned before. I, therefore, would like to ask a very fundamental question: whom does OOPS aim to serve?

Luc: Anyone who wants or needs this knowledge...:>

Anonymous2: The original MIT OCW is for self learners. OOPS is for people who want to learn through translation. But for those Chinese who come here just to learn, it would be extremely difficult to achieve any learning with this translation quality.

Me: May I ask why?

Anonymous2: No quality guarantee.

1. English: many volunteers have problems even with English expressions.
2. Chinese: the fluency and elegance of translation are in question.
3. Quality: without a rigorous quality control process—which simply posting all translations online does not provide—learners may be misled by online postings.
4. If self learners are willing to take the risk and study those translated materials and wind up studying the wrong information, the results would be detrimental.

These sincere suggestions are not to splash cold water on your head. I appreciate the volunteer enthusiasm and would love to see the project succeed. Therefore I want to remind everyone not to get into a group self-congratulating mode, become close-minded and develop a within-group self reinforcement of team mentality, which may result in regarding all suggestions as criticism and thus creating blind spots. After all, end users are the ones who can measure the project's success. Nevertheless, I have not seen any positive feedback from pure learners.

When I saw the first message posted by Anonymous1, I thought to myself, “another one of those messages!” I had been reading online messages religiously since I became involved with OOPS. Reading too many postings that questioned the same issues created a certain amount of fatigue. I was not very interested in following this thread until Anonymous2 responded. Anonymous2's argument was not one that I had not seen before. However, I took a chance by asking the why question, not knowing whether this person would reply. Sure enough, this person did. Not only did Anonymous2 reply, Anonymous2 replied at great length, listing four points regarding the quality issue. Judging from the message, I suspected this person had been reading the forum. This person seemed to have anticipated the reaction that I might have to the posting. To circumvent the anticipated reaction, this person declared first that he or she welcomed OOPS' success but cautioned our blind spots. I replied immediately with some of my

counter arguments. At the end of my posting, I wrote, “you can choose to stay at the sideline or become part of the solution” and encouraged this person to help OOPS.

One thing worth mentioning was that at the same time this thread was developing, another thread also gained community attention. The other thread started out as a typical message seeking translation help. The volunteer asked for help translating terms such as general audiences, grant proposal, literature review, portfolio review, executive summary, etc. I was the first one to reply and offer some suggestions. I do remember thinking to myself that these terms seemed quite straightforward. If this volunteer considered these difficult, I wondered how he or she would manage to finish the rest of the project. Right after my message, a series of exchanges between an anonymous visitor and Luc exploded.

Anonymous1: These questions proofed:

OOPS provides a good learning environment for volunteer translators. However, the site is very dangerous for those pure Chinese learners who like to learn from translated materials.

Let me make a sincere suggestion: administrators should pay swift attention to the many questions raised by many pure learners in this forum, many of those questions demonstrated confusion and frustration. You have to come up with ways to deal with the issue of quality and material usability. You cannot just continue to ask the users to read the FAQs. If the content is useless, keep writing more detailed explanations; you have simply put the cart before the horse. Such a vigorous, good-willed project has gained many supporters. What a pity it would be if the final products are useless.

Luc: Wrong! Wrong! Wrong! These questions proved that the translator asks questions in the translation process. This will only improve quality and accuracy. As to the questions most users have brought up, I don't think you understand that those questions are related to the thin-course issue rooted in MIT OCW. I have not seen any questions related to the usability of the materials.

Anonymous: This is close-minded group's typical reaction:

1. We have done all we can, or you are wrong
2. Why don't you join us?

The bottom line. Either you have to applaud as an outsider, or you have to join the group to be an insider. Why can't I say what I have to say as a third party?

Luc: Oh... I didn't expect a close-minded critics to think his or her criticism has to be correct. The one being criticized has to agree, and any other reactions are categorized as being typical...:Q

How come we have not yet conquered Mars...:> If complaints work, then all I have to do is yell for three days and on day number four we all immigrate to Mars?

To a certain degree, I agreed with this anonymous person that something was not quite right. I too have seen too many similar questions about how to use the materials or even where to find the materials. Again and again, many people asked where they could find either the translation or the reference materials such as textbooks. Most of the time, Luc would reply to those postings with a standard long answer. I sensed that what had been said did not seem sufficient to help the many confused and frustrated users out there utilize available resources. Yet, like Luc said, this issue stood on its own and did not relate to quality. Nevertheless, when I saw that the same person, or so I assumed, posted a reply after Luc's first message, I actually chuckled. I felt this message was a direct response to my call for "joining us" that appeared in the separate thread during the same period. I can see from this person's perspective that we seemed to be a very closed group. Seeing this person's reaction made me reflect on my own posting. When I asked them to "join us," I hoped they would experience OOPS first hand before offering criticism. I felt that certain experiences can only be known and understood firsthand rather than vicariously. However, I did not post this thought in the message because I felt that the

person would not be able to understand anyway. I wondered, exactly like this person suggested, if maybe there is an invisible divide between an outsider and an insider? When I read Luc's second reply, I just laughed. Luc is Luc and the message sounded like him: rebellious, yet straightforward. Plus, I can understand his frustration in regard to answering similar questions repeatedly. Even I felt fatigue just reading some of the messages, so in all fairness I had to admit that I might have rebelled at being expected to answer them all.

Four more people, including the one who initially asked those translation questions, joined this discussion, each offering their take on this issue. In the meantime, the earlier thread, titled "questions about translation" continued with heated debates. In one of Luc's messages, he indicated that, "the spirit of this project is not about making suggestions but about participation! Please do not bring only criticisms but also solutions." Many other volunteers participated in this thread and posted some long postings, something rare in this forum. One of the postings commented, "You cannot just say across the board that all translation has quality problems. This is not fair for many dedicated volunteers."

Doris also joined in and offered her opinion on the forum, something she did not do very often. Doris once shared with me that she considered herself the "silent group;" she read but did not always post. Not this time. In response to the anonymous guest's accusation, Doris wrote,

I am an OOPS volunteer, joining for over a year, mainly responsible for translation and editing tasks. While doing these two tasks, I have always been very careful and fearful of making mistakes... I cannot say what I have translated is the best; there is always room for improvement. However, the quality has to be sufficient to answer to my own conscience when thinking about the users. I believe most volunteers hold the same

attitude. That is why they bring up questions, hoping to brainstorm for more appropriate translation...Maybe you did not know that all translations have to go through editing and reviewing. Even if the course is online, anyone can make revision. I do not think we are self-congratulating and close-minded....To accomplish anything requires a process. Where will the results come from with this process? ... OOPS volunteers do this not for money, not for fame. We have to steal time away from our busy daily life to do this. Why? Without such enthusiasm, hope, and perseverance, human beings would probably still be living in caves.

Why do OOPSers do what we do? Maybe like Wikipedians and open source user-programmers, we believe in OOPS and like to contribute to its success? Here, I also started to sense that Doris asserted her narrative authority by valuing her own experience. She intrinsically emphasized her long history with OOPS (over a year), a factor that seemed important in order for Doris to voice her opinion. Shortly after Doris posted her thoughts online, this anonymous visitor posted an apparently-copied-and-pasted content, citing groupthink from Wikipedia by Janis. This person even highlighted certain sentences or parts of sentences, such as

When they are deeply involved in a cohesive in-group, when the members' strivings for unanimity override their motivation to elastically appraise alternative course of action

High group cohesiveness

Homogeneity of members' social background and ideology

... with low hope of a better solution than the one offered by the leader(s)

Unquestioned belief in the inherent morality of the group

Shared stereotypes of outgroup, particularly opponents

Direct pressure on dissenters to conform

Incomplete survey of alternatives

Seeing this message reminded me that I had thought about groupthink phenomenon almost a year ago, in September 2004. At the time, I was in the early stage of my journey into OOPS when I was exploring different aspects of this project. During this early stage, I thought the flip side of a highly conformed group could be the compromise of diversity of viewpoints. On one occasion I even shared my theory on the forum. I mentioned groupthink, but I contested the idea that OOPS offered a healthy attitude of accepting different opinions. In my observation, even though OOPS seemed to possess a high degree of cohesion, as we all seemed to agree on a shared goal, one of our fundamental beliefs in a wiki-like system demonstrated our core value of a “never-finished” system, one that is always open for suggestion. A year later, when another person brought up the concept of groupthink, I started to re-think the idea of a continuum between conformity and diversity. I observed the forum as these conversations continued voluntarily. I was more intrigued that people would spend energy engaging in an online debate than whether groupthink existed in OOPS. Disagreeing with the citation of groupthink, Doris quickly replied.

Thanks to the guest who shared with us information about "groupthink."  
However, as a volunteer, I don't think the following statements  
appropriately describe the nature of the OOPS program as I know it.

...

Everyone joins and quits as he/she wishes. As a matter of fact, volunteers in the areas of translating, editing, and reviewing work independently to fulfill their tasks. There are no compulsory obligations either. The main reason why most volunteers join OOPS is simply to share their knowledge with others. If I remember correctly, one of OOPS' objectives is to establish a wiki system where people can become involved in content editing. Aren't such ideals evidence for appraising alternative courses of action?

...

These symptoms seem to underestimate or insult OOPS volunteers' motives, intellect, and independence as if OOPS participants have a mob mentality or as if the volunteers are a bunch of puppets. OOPS volunteers do not withhold criticism; instead, I believe most of them have practiced mutual critical exchanges of both work and attitude.

These are my personal thoughts which can't speak for OOPS or other volunteers. I sincerely hope that more people, especially professionals and intellectuals, will be willing to involve themselves in OOPS and make the program better.

*Doris: Many Things Happened Behind the Stage*

Right after posting this message on the forum, Doris sent me that email and asked for an opportunity to discuss this issue with me. We spoke the next day, engaging in over an hour of conversation during which we discussed this current debate about quality. I decided to include a large chunk of this discussion below for several reasons. First, I would like for readers to experience Doris' emotion as she responded to this particular episode. One of the best ways of showing her strong emotion is to present the conversation the way it happened. Second, readers can see how Doris and I interacted and how our knowledge community relationship played out in this exchange. Third, I wanted readers to trace how Doris legitimized her narrative authority by expressing her sense of community. It is important to understand how Doris saw herself in relationship to the OOPS community. Fourth, in unpacking the topic about quality control, three additional issues emerged: editor shortage, the insider-outsider divide and leadership concerns. I wanted readers to witness how those issues were brought up by Doris in our knowledge community. Last, much of the content of the conversation was repetitive. I intentionally left the redundancies in the text because I wanted to show how Doris and I went back and



forth among our prior conversations, the online postings, and our on-going current conversation.

Doris: Did you see the posting about groupthink?

Grace: Yes

Doris: What do you think?

Grace: You seemed to have some reactions to the posting?

Doris: I have posted my reactions on the forum. That was my reaction. I think this visitor has posted at two separate threads. I replied to this one, and you replied to the other, the one that started out with a translation question ... I think the same person is responsible for both postings. He or she posted anonymously but the tone of voice is exactly the same. I don't think it is a coincident that two strangers share the exact same tone of voice and choose to post at the same time.

Judging from his tone of voice, I suspect he is not a volunteer but a bystander... Many of his ideas are very good, but my premise is that he needs to be a volunteer first, understand the process first hand—then he or she can bring up such suggestions. This way, I think the suggestions would be more realistic and constructive.

He criticized the fact that quality has no guarantee. Isn't this too general? Do all of the courses translated have quality problems? If you say the translation is very rough, please give me specific examples. Which course, which sentence? I feel like a group of people going to a basketball game, if I may draw an analogy. This participant would complain about how poorly the players are playing. If so, why doesn't he come down and play the game himself? He doesn't understand the OOPS operation and talks purely from a bystander's view. He was under the impression that this is like a place for students to practice translation. He didn't know that we have the process of editing and reviewing, that even after publishing, any person who wishes can make corrections at any time. We never said that once a course is published, everybody shuts up. Quite the opposite. I keep emphasizing that this is an ongoing revision. The final goal is a wiki system where everybody can edit the content. Is this what a close-minded group would do? We are not a close-minded group. We never said you have to accept our procedure 100%. If you don't like the current procedure, fine,

give us a specific suggestion – how do you think we should go about tackling quality control? The anonymous poster didn't offer anything specific but just rambled on about translation quality and the danger for self learners. Very irresponsible.

Grace: Sounds like you are a little angry?

Doris: Not angry. I think he is too biased. He has preconceived, negative ideas about our volunteers: volunteers cannot create quality products. Who knows who those volunteers are? But he ignored the fact that most OOPS volunteers are well educated. According to Luc's data, if I remember correctly, we have more people with masters' degrees, 40%? Does he think all these well-educated people cannot think independently? It seems to him that we all are brainwashed by Luc: Luc said go this way and we just follow. He seems to want to label us as. .. we only want to argue against his opinion, as if all of us are brainwashed by Luc. Like I said in the posting, we do this not for status, and certainly not for money, none of us got paid. Why do we do what we do? It is not like Luc blackmails us so we have to listen to him.

In his citation of groupthink, he resorted to bold font for some of the symptoms. Is he afraid that we are all so blind that we cannot see?

Grace: Statements in bold are where he thinks OOPS fails

Doris: Exactly! That is why I offered my counter arguments against almost every one of his points, talking from the perspective of a volunteer: this is the OOPS that I know. I did stress in my posting that I speak for myself and my opinion may not represent all volunteers' view point. If you disagree with what I said, take it on with me, not with OOPS. I don't want him to use what I said as yet another example of Luc brainwashing us.

I am particularly offended by his labeling. Maybe this has something to do with my teacher-habit. No one person should be labeled according to one property. I don't understand why many people like to label others, categorizing us into X or Y. I feel that is what he is doing. He offered some suggestions, many of which are good. But what we need are more specific suggestions, instead of the off-the-court remarks implying that "you all play a really bad ball game." How does he know how this team operates? He doesn't have inside information and experience. It is true that he can have this more objective, third-

person view, but it does not mean that we will and should take everything he said to heart.

Grace: We asked him to join us. His argument is that he can't understand why he can't make suggestions from a third-person or outsider's perspective?

Doris: I feel that if a person sees these challenges, he or she should join us in order to contribute whatever is possible to try to make the site better, instead of offering off-the-court criticisms that we are playing a bad game. That is impractical. If a person joins us and gains a solid understanding about OOPS, then he or she can see areas for improvement. At that point, I think what he brings up then would be more objective. If he has experienced OOPS, then he knows. Right now, he thinks we are all irresponsible in our translation and editing. He gave me this feeling that he thinks we are a group of non-professional who do this work absent-mindedly. What he didn't understand is that we do take our work very seriously. The site displays our names and our email addresses. That shows we are responsible. If he thinks a certain translation is not good, give specific suggestions. Instead, he makes broad general statements as if all our translation is bad.

Grace: You just said something very interesting. You said if he does not have OOPS experience, then he cannot understand how we operate. Why do you say so?

Doris: Because he didn't understand our procedure – translation, editing, review, each involves different people. I feel he thinks we don't have a rigorous quality control procedure. In reality, we do. The problem is we don't have enough editors. This is a real problem. Instead of proposing a solution, all he did was keeping emphasizing "this is a problem, this is a very big problem" We know it is a problem. I feel he thinks we are not aware of such a problem at all. Don't you agree, Grace? Actually, we are aware of the problem. From his perspective, we are not aware of the problem. We are a group of absent-minded persons doing careless translation. That is why I posted, speaking from being an active volunteer, that I have always been very careful in my work. I will never claim that my work is the best. I think nobody would claim that his or her work is the best. There is always room for improvement. At least I know I can answer to myself: I did my best. Maybe my best is not up to someone else's standards. Then this would the time

for the person with more ability to offer specific suggestions: how to correct here and there. This is a constructive suggestion, rather than a critical suggestion, which is useless. We know about OOPS' current status. You and I have talked about many of our shortcomings, such as the shortage of editors. We are often concerned about these issues. We didn't tell outsiders that we are concerned about these issues, however. I feel this outsider/critic thinks we are like puppets, controlled by Luc. That is why I said if he didn't participate in OOPS, didn't understand the entire workflow, what he saw has some distance to reality. He talks based on a very general understanding about OOPS. He probably thinks only one person is involved in each course. Maybe he thinks volunteers are people who have nothing else better to do in their lives.

Grace: You think that this visitor, with his current opinion about OOPS, will change his opinion once he becomes a volunteer?

Doris: Not necessarily, but once he is a volunteer, his suggestions could better reflect areas needing improvement. We know we need to recruit more qualified people. Not for name, not for money, so who would want to do this?

Grace: So are you saying that because he is not an insider, he cannot fully appreciate the efforts we have put in?

Doris: Yes, this is how I feel. Maybe he would appreciate our so-called crazy spirit, but he disagrees with our approach. If everyone were like him, thinking that a project is not feasible because it is different and daring, then would Edison have invented so many things? Would Newton have discovered the laws of physics? Would our national father have finally managed to uproot the Qing Dynasty after 11 tries? Many people believed that these innovative people were "nuts" and that what they were doing was not feasible. I feel that what the visitor and other people who share his approach are thinking is, if this project is not feasible, and there are many perceivable problems, then just don't do it...But what they fail to see is that we are doing our best to achieve higher quality. I feel that he thinks we are a group of enthusiastic "nuts", manipulated by Luc. He underestimates this well-educated group. We don't have to listen to Luc. Like I said in the posting, everyone joins and quits as he or she wishes. Nobody forces us into participating in the project. We are not even forced to finish the translation once we adopt a course. Many people cannot finish the translation, and

we re-open those courses every two months. I think he does not have a full understanding of the situation, so he has some biased misunderstanding about OOPS.

Grace: So in your opinion, in order for him to have this full understanding, he has to be one of us?

Doris: Yes.

Grace: It is impossible then, you believe, that that he might still understand and not be a part of us?

Doris: I think that would be a little difficult. If you want to have a real sense of the challenges OOPS faces, the benefits we gain through self learning, you must engage in that actual experience. Unless he has experienced it, he cannot appreciate it.

Grace: So you said you are not angry—are you frustrated?

Doris: Yes, frustrated. Many of his suggestions are pretty good. He reminded us of areas needing improvement. Maybe he even did this out of good will. But in regard to many specific details, he failed to see the whole picture and jumped to conclusions too abruptly. If others see his posting and do not try to understand OOPS, that will create a general misunderstanding about OOPS as a careless group.

Grace: But why do people so easily form misunderstandings about OOPS?

Doris: Yea, this is very strange. I don't understand it either. From their comments, you can tell they are talented people. How wonderful it would be if they would all join OOPS? Instead of being one of us, they choose to stay at the sideline. If everyone is like that, this would be a horrible world.

Grace: Why do you say so?

Doris: These talented people, from both a professional and intellectual standpoint, certainly could help make OOPS better. But they choose to criticize rather than help. There are many people like this in society, people who only offer lip service. Only a few would take an action. Those who do not participate often like to criticize. I do not totally ignore their suggestions as all being useless, but if they are not in our shoes, how could they know how we feel exactly?

Grace: I have a feeling that these critics all have similar opinions. These opinions seem to surface every several months.

- Doris: That is right. Don't you think that judging from their tone of voice, they are talking as if we are not even aware of such problems at all? I think it would be extremely difficult for people who do not understand our detailed operation to understand us.
- Grace: No wonder they said we are cult-like...
- Doris: As long as someone criticizes OOPS, we all gang up, fight back. But it is very puzzling to me. Do they not understand that this is a voluntary organization? Do they think that Luc offers us some "benefits" so we have to listen to him? According to the visiting poster, we OOPS volunteers are very obedient, as if we don't even have our own thinking. To me, this is an insult.
- Grace: Why?
- Doris: He thinks we do what Luc tells us to as if we have no doubts. How does he know that we have no doubts? Many things happen behind the stage that he did not see. Like you and I have often talked about how to improve quality, how to recruit more people. We often reflect upon and discuss these issues. But he has no way of knowing that. He assumes instead that we are close-minded and in this self-congratulating mode. I totally disagree with him. I think we are not at all self congratulating. I often reflect on how to improve my translation
- Grace: The groupthink he cited, does he has some good points?
- Doris: Yes, he does. That is why I did not counter argue everything. But there are certain points that are over-stereotyping, over-labeling. Maybe he simply misunderstands. So I offered my point of view as a volunteer, my understanding of OOPS, which may not fit with groupthink...  
I really feel frustrated....
- Grace: What I found interesting is that this conversation started out debating the "quality issue" but then it evolved into "you are a group with a mob mentality."
- Doris: He didn't say that out right in the way I have, but he implied it. But a smart person can tell from those postings that everything he said had negative connotations. It appeared that all he did was to present a term called groupthink. But many of the items, in my view, are stereotyping and labeling.
- Grace: I think at the beginning his tone of voice was okay, but later he seemed to get angry.

Doris: Like Luc said, if we don't take his suggestions, then he becomes angry. But at the end, I think both sides – Luc and the visitor—got a little angry, something not wise. We should acknowledge the visitor's good-willed motivations. Maybe my thinking is a habit that comes from being a former teacher.

Grace: Have you not seen Luc get angry before?

Doris: No, maybe I only read what interests me, so I might miss many conversations...I am not surprised that he would do and say what he did. This is the first time I saw him give an emotional reply. He did not keep his cool. I can understand this, however. Maybe it is out of his frustration that people just complain without contributing real efforts. I can understand why Luc would have such emotions. However, I think it is not a good thing to get angry. Once a person gets angry, the postings are emotional and therefore lose the objectivity.

Grace: Emotion and objectivity cannot co-exist?

Doris: No. especially if someone has a negative emotion, his view point will be twisted. I don't think Luc should say that the other person is wrong, that he is not open-minded himself. Luc shouldn't say so.

Grace: What kind of negative impact did that incur?

Doris: You see, you see, what kind of person this is? You cannot win the argument so you react emotionally. This is not good. As a leader of OOPS, Luc did not keep his cool. I think this is not appropriate. Luc represents OOPS. Doris, on the other hand, represents herself. What I say reflects my own thinking, not that of OOPS, or of OOPS volunteers. I hate labeling. That is my opinion, but I am not saying everyone else also thinks the same. Luc is different. He started the project and has been with the project since. Many people equate OOPS with Luc. Many people think what he says represents OOPS. Maybe he only speaks as a member of the OOPS community. However, for others, they might have a different interpretation. They might think – look at OOPS, what an attitude! Once Luc got emotional, the visitor got emotional too. That is why I emphasized in my posting that I am just a volunteer, doing this not for money, not for name. What I said does not represent OOPS or other OOPS volunteers. I don't want people to use what I said as some kind of evidence to go against OOPS. I think that was the visitor's biggest mistake. He over generalized the quality problem without offering any concrete examples. That would be more

convincing if he could point out problems in a particular course and offer his suggestion. That would be more persuasive. The only thing he did was to make many statements, but he did not provide examples to support them. This is illogical. Any time you make a statement, you have to give specific examples to support it. He didn't. His problem is a typical eastern blind spot –he keeps making statements without supporting evidence. I can come up with thousands of statements without any evidence or support. Someone else also said the same thing – you cannot generalize that all the translation has quality problems. Someone else also asked this visitor to join and contribute what he can.

Like you said last time, it takes a nut to do this crazy thing. You see, we even have to take insults. Don't you think that groupthink was an insult?

I am not saying we cannot find any features of groupthink in OOPS. OOPS does have some of it, but don't many organized communities? Plus, there is this negative connotation of groupthink. Why can't the visitor see the good features of groupthink in OOPS? The same thing can be seen as good or bad. Like this feature about consistency. I think it is a good thing that we all agree on the idea of knowledge sharing so we all contribute what we can, whether it is marketing, file conversation or what have you. But the way he views consistency, it appears he thinks that if Luc told us to go east, we would go east. If Luc told us to go west, we would just follow directions. He also criticizes that we don't like different opinions. That is just not the case. We are always looking for a better solution! I think the label groupthink is neutral, but the visitor interprets it in a biased way. He chooses to use groupthink in a negative way so the idea is twisted. If we take it from the positive perspective, we can see some good features of OOPS in groupthink. If we take it from the negative perspective, we can see some bad features of OOPS in groupthink.

Grace: Yes, I can feel your frustration.

Doris: Some of his suggestions were pretty good. We are aware of the existence of those problems. But the trouble is that he doesn't know we are also aware of the problems. It appears to him that OOPS volunteers are a group of ostrich, listening to Luc as if we cannot think ourselves. I think his comment is an insult to our volunteers.



- Grace: That is why you felt the need to talk to me, to share your thoughts with me?
- Doris: Yes. And I also would like to get your perspective. How did you see this incident?
- Grace: I am thinking this. When there are outside forces invading OOPS, OOPSers are even more inclined to “gang up” together.
- Doris: Hmm...I think it is very possible. Looking at those postings by many people, I have thought that maybe many are volunteers. Maybe they feel it is not fair for the visitor to pass that kind of judgment. Everyone might want to voice their opinion from a volunteer’s perspective. I think your theory is possible.
- But I still want to say this. I still think Luc should not be so emotional when replying the postings. I think I should voice my opinion when I see Luc that he did something inappropriate. It is not as if everything he says or does will get our unquestioned approval. As you said, you always give him suggestions. It is up to him whether he will take them or not, even though it appears he does not accept most of them. However, maybe it is possible that if we make a suggestion one time, two times or ten times, he will eventually listen to what we are saying. If more than one person mentions the same thing, maybe over time, he will eventually become aware that there is a problem and start thinking about that issue.
- Grace: With his strong personality ...
- Doris: That is why I said, maybe it takes many people to tell him the same thing before he can see it. Many people like you and I, volunteers. After all, these suggestions are based on our first-hand experience and our feelings. I think that since he is a person with reasoning, he will eventually accept our suggestions. But I also know that when it comes to those outsiders who complain, Luc will ignore them!

In this very lengthy conversation, Doris and I discussed an on-going debate about translation quality. During our conversation, I began to see how Doris legitimized her narrative authority by asserting her volunteer status and first-hand experience. In Doris’ case, her narrative authority was expressed in relationship to her sense of community as she, in her own way, protected and defended OOPS. Doris’ narrative authority apparently

was also shaped by the social milieu when she emphasized that her position should not represent all OOPS volunteers' voice. By stressing this point, Doris acknowledged the possible social reaction to her postings and preempted any further attack of OOPS due to her personal arguments. Furthermore, Doris validated OOPS volunteers' knowledge and personal experience as the key to gain entry into the "insider" knowing. As I probed several times the conflict surrounding the topic of inside-outsider divide, I began to see how insiders and outsiders share different experiences, and how both sides ultimately could arrive at different or even competing knowledge and knowing. As a result, this divide could lead to the constraining of each others' narrative authority, as evident in the insider-outsider example shown above. Through this conversation, I also knew that when Doris was comfortable enough to share with me her criticisms of Luc, she communicated it in the safe place of our knowledge community. It was also evident that in our knowledge community, Doris and I went back and forth through time when discussing different issues. Doris acknowledged our on-going dialogue and sometimes referred to them as the evidence to enhance her narrative authority of our shared OOPS experience.

Doris' metaphor of the basketball game stuck with me. In Doris' view, it was irresponsible behavior to criticize the basketball players of a bad game when we cannot play a good game ourselves. I wholeheartedly agreed with Doris in the notion that outsiders may not be able to understand, due to the lack of hands-on experience, certain aspects of OOPS. However, isn't it possible that I can just enjoy watching a basketball game without really knowing how to play the game? This reminded me of Wikipedia. Do people who consider Wikipedia as a reference source need to have the knowledge and

skill to question the creditability of it? How about the user-programmers in the open source community? How are they different from the users of Wikipedia and OOPS?

In talking about quality with Doris, several additional issues emerged. These issues relate directly to the management and organization of OOPS and will continue to resurface in the remaining text. For example, the issue regarding Luc's leadership surfaced in the above conversation. I began to think that, as Doris rightfully pointed out repeatedly, Luc as the leader really was the "powerless" one in the sense that we, the volunteers, made our free-will decisions about whether we wanted to follow him. Following this trend of thought, then I also started to expand the insider-outsider divide to include the divide between Luc, the leader, and us, the volunteers. Maybe the "divide" existed not only between members and non-members, it also existed within the community among people taking on different roles.

*Doris: He Ruined My Translation*

After our one-hour long conversation, my head was spinning. I was impressed by Doris' strong support for OOPS and was intrigued by her view of the clear insider-outsider divide. Maybe a certain experience brings about a certain perspective. The issue of quality drew me into this research inquiry and continued to be a perplexing one to contemplate. I started realizing this issue when I was challenged by the thought of social responsibility, and the notion that "wrong knowledge is worse than no knowledge." How about Doris? How did she first come to wrestle with this issue? I asked her that question in our second Skype session in early August 2005.

Doris: [I did not start wrestling with the issue until] after I started to be involved with the editing work, after I turned in my first translation and Luc asked if I wanted to help with editing. I asked what an editor should do and I read the FAQs, too. Then I

thought I would like to give it a try. During the editing process, I began to realize that it is really important to have a second opinion in connection with any translation work. We cannot see our own fault at times, so we need a second pair of eyes. I think I mentioned this to you last time. Many translators knew certain parts of the translation were not good enough, but they could not come up with a better translation. I have had two translators who, after examining my editing, emailed me to thank me and told me that what I had changed was exactly the portion where they felt rather weak, the places they knew needed to be improved. They knew their translation was inferior, but they may not have had anyone to ask for help. Not everyone would post questions on the forum, leaving an opening for other participants to brainstorm.

In regard to the piece that I mentioned to you last time, the piece that required major re-work, the translator chose to leave it blank when he ran into problems. I think I probably translated 20% of the course. He skipped all article and book titles. I think we should still give a Chinese title for book and article, with English next to it. The Chinese title would give learners an idea of what this book/article might be. I always check to see if a translated book already exists, and if it does I will refer to the existing title. That translator did not do any of this kind of homework. I found out that many translated textbooks already existed, some even having many versions....This translator arbitrarily decided on what should be translated and what should be skipped. I was very surprised at this translator's work. That was the first piece of work that I have seen where the translator did not actually complete the work. It appeared to me he did not even proofread his own work and revise at least once before submitting the work.

Grace: This was when you started to think about the issue of quality control?

Doris: Yes, his work triggered this thought. I realized it is really very important. Prior to this, all the works I had edited were excellent. Some would even add additional notes in the lecture notes. For example, some would say they translated this section literally but they wondered if they should translate the meaning instead. Then I might suggest maybe they should translate the meaning since the literal translation does not make sense here. So I would add my notes after theirs and give them my reasoning.

Then I sent it back allowing them to accept or reject my suggestions. Usually they accepted my suggestions.

I learned that Doris became aware of the translation quality issue as she started to take on the volunteer editor's role. Through her active participation, Doris also revealed the satisfaction she gained through self learning. However, Doris' way of knowing the issue of quality implied editor quality too. About two weeks prior to this Skype talk, Doris forwarded me a series of emails she and Luc had exchanged. Luc contacted Doris and asked if she could take on more editing work. In the reply email to Luc, Doris revealed her dissatisfaction with one of the editors who she believed "ruined" her work.

To be frank with you, I'm worried about the quality of our editors. I had an unpleasant experience with one of them who actually made my translation look worse. I ultimately emailed my translation and the editor's version to Grace, the girl in charge of the transcription project who has been exchanging emails with me constantly. I needed to ask for a second opinion to avoid being too subjective. She agreed with my comment. As a result, I ignored 99% of the editor's revisions, not out of arrogance but because of my principles in regard to maintaining a high quality of translation. Don't get me wrong-I'm not an expert in translation and I'm still learning, but I believe my judgment can't be so terribly wrong. I accidentally found out that I happened to be the editor for a course translation that particular editor adopted. It took me quite some time to edit and revise his work. The problem didn't come from his understanding or English proficiency, but I guess he's troubled by coming up with appropriate Chinese terms and sentences. Again, I'm not an expert in translation nor a picky person and I fully understand the difficulties any one may have in the process of translation. However, it seems not a good idea to put someone like that on our editors' list because it may scare some translators off.

...

This is just my personal opinion. I know it's tough to recruit and keep "qualified" editors. Would it be a good idea if we try to find out the reason why our editors quit - or have you already made some attempt to do that?

...

Sorry for being so nosy, which is usually not my style though. HaHa! Grace and I have been discussing issues and concerns regarding this project; therefore, I feel I should let you know what I experienced. Fortunately, my experiences working with other editors and translators are mostly very pleasant.

The same person whose work was edited by Doris somehow also became the editor of Doris' work. When Doris edited this person's translation, it took quite an effort. Later when this person edited Doris' work, she felt her translation was jeopardized. When she found out that these two people turned out to be the same person, Doris was very concerned. Doris expressed her reservation to Luc and also detailed her dissatisfaction in this discovery with me. Doris questioned how this person could be an editor? If the editor is to be the gatekeeper for quality, then we certainly should also pay attention to editor quality. From Doris' email to Luc, I saw that Doris seemed to shift the boundary of her knowledge community with me to include Luc. I also witnessed how Doris' narrative authority was reinforced by me in our knowledge community, and Doris used that reinforcement as one of her arguments to Luc. On the other hand, I also saw how Doris' narrative authority had been constrained by another volunteer who Doris believed ruined her work. When Doris said her work was actually edited to less quality, that reminded me of a similar report from a Wikipedia experience. If the quality depends on the quality of the people, then maybe more "eyeballs" do not necessarily guarantee anything?

How did Doris go about editing someone else's creative work? I asked her this question in our August 2005 Skype session. In that discussion, her knowledge of editing that she had derived from her recent experiences bubbled to the surface. She spoke of editor's work as not only paying attention to the literature translation but also attending to the technical terminology.

Doris: I am reading the FAQs about editor's work. The directions indicate the work involves the accuracy of translation, smoothing out the grammar and if there is extra time, the editor can also take care of the translation of technical terminologies. It went on to say that editing is an important defense of this project; the editor can help improve the overall quality of the translation; therefore, editing is an important role. [reading from the FAQ] *Attention: we put a higher demand on editor. The main focus is not to change to a different translation for a term but to make corrections.* It said all translation is a unique creation; so as long as the translation is not incorrect, the editor should not spend too much time editing it.

I agree with this. Basically, I did not correct mistakes, but if I could make the translation better ... and translator has the option whether they want to accept my modification. My experience so far has been that they usually accept my modification. Maybe I have always used a polite tone of voice. I usually say this is my suggestion, or give them an option of A or B. Maybe they see "yea my wordsmith work is better," and they would like to see their work be better. So far they have all gladly accepted my modifications. What I give are suggestions. But they always accept my suggestions.

Grace: I think you are one of the more diligent ones. I cannot say how others work, but you see, many of the published courses were edited by Luc himself...

Doris: Yea, I saw that too

Grace: And they cover all kinds of disciplines...

Doris: But I think those are the ones for which he couldn't find an editor, so he had no choice but to do it himself

Grace: He must be very knowledgeable to know all this stuff, if he were to take your approach

Doris: No, I think he could only focus on the literary translation. I don't think he can do too much background information.

Grace: Did it say an editor needs to look up the definitions of technical terminologies?

Doris: No, it does not require us to do so, but I just did it myself

Grace: That's what I mean, I think you are more diligent than others. Good, keep up the good work!

Doris: That's why I said in this life time, I cannot get rid of the habit of being a teacher.

Grace: What do you mean by that?

Doris: I think basically any thing that will be presented to others should have some basic quality. At least I need to feel comfortable. I cannot just release something for public consumption when I myself am not clear on X, or haven't checked Y. I cannot just let it go like that, too risky. Like being a teacher, when you are doing the preparation, you need to make sure the materials you give to students are correct, the concepts mentioned are checked, the logic of thoughts is correct ... I don't know, maybe I am just being picky

Grace: If something has your name on it, it has to be ..

Doris: That's right! what you said is right. If my name is on it, then I must be responsible for it. If there is mistake in it and that mistake causes someone to misunderstand, I feel responsible. I think it is a serious business if my mistakes hinder others' learning. I believe that people generally remember the concept they first encounter, more rooted in the memory. So if this first contact with this concept was incorrect, to correct the misconception later would be more difficult...

In this exchange, the issue of editor shortage, brought up briefly in the previous session, appeared again. More importantly, Doris revealed further her sense of responsibility to herself and to the OOPS community. I can certainly relate to this sense of social responsibility. I still remember the uneasy feeling when I first saw my name posted on the web site, together with the course I translated. Doris mentioned that people tend to remember a concept as they first encounter it. Therefore, Doris believed, we should pay attention to translation quality. Doris' remark reminded me of a conversation I had with Arnold two months prior, in May 2004. That conversation initially focused on how the term "marketing" is translated differently in China and Taiwan, which had implications for translation but also raised quality control issues.



Arnold: ... for “marketing”, in China, we translated it to “市場營銷”. This is a well established term. But nowadays, new terminologies keep coming in. Then there will be different translations at the beginning for a period of time. Then what I do is I search on the Internet. I might find several core journals or more authoritative sources, and see which translation was used the most - then I will use that one.

... OOPS has only one reviewer for each course, not two or three. So personal bias has a large influence. If you prefer to translate marketing as “市場學” even though most other people use “市場營銷”, if you are the reviewer, it will be translated to “市場學.” I think this is a larger problem. Take thesis defense for example: usually it requires at least three professors. I think it is more democratic if there is more than one reviewer. Because if we believe only one person has the authority, then there should be no authority.

Grace: So you believe reviewers have the authority?

Arnold: Yes, if there are several of them, from top universities. Academically speaking, that should be a quality guarantee.

Grace: Doesn't the OOPS model empower everyone to be the eyes and ears for quality control?

Arnold: That will cause problems. As a beginner, they might think “marketing” should be translated to “市場”, for example. I am not saying we should never challenge authority, but we should follow them, especially when they are well established.

Grace: This is just an example. But regardless how “marketing” is translated, how will such a translation difference influence learners' learning?

Arnold: It may not make any difference now but it will in the future when they reference other materials. They will then encounter different terminologies. In the academic world, I think having a standard is better.

In Arnold's view, quality can be guaranteed if translators follow a standard that is set by the authorities. Different translations of the same term will result in learning confusion and therefore hinder learning. As a practicing teacher in a college, Arnold often looked at an issue with great thought. Arnold was also concerned about the issue of

quality. Like to Doris, Arnold cautioned that a wrong translation could impede learning. Unlike Doris, however, Arnold seemed to focus more on a standard established by an authority as the way to guarantee quality whereas Doris centered her attention on editor quality arising from self-regulation. But who was the authority in Arnold's mind? We will learn more about Arnold's perspective later.

As both a translator as well as an editor, Doris' experience provided many different perspectives that I, as only a translator, could not see. It was illuminating that through Doris' experience of editing, she came to know the quality issue. However, she did not seem to stop there. When Doris started to mention her friend who taught translation, I began to see the extension of Doris' OOPS involvement.

Doris: The other day, I emailed Luc about the mess-up of my work and I told him this is very serious, right? He mentioned he will just let that editor gradually step down from editing. In that email, he also mentioned it has been bothering him that there has been a decline in volunteer editors; he cannot maintain a reasonable number. He said OOPS is really struggling with the shortage of editors. Then I thought about my colleague at Newcastle and asked him if maybe their translation and interpretation graduate students could help OOPS.

Grace: So the email from Luc triggered you to think about your ex-colleague?

Doris: No, it was during our email conversations. We talked a lot about the issue of translation. Those conversations triggered me to think about him. So I gave contacting him a try. I found his contact info on the web, also got to know that he is teaching some graduate classes there, as well. So I was very glad that he responded a week later, showing interest in helping. He said he knew about OOPS and believes it to be a great project, but due to his own job, he cannot volunteer. Nevertheless, he proposed that maybe he could persuade his boss into letting graduate students be involved, to gain some practical experience, as a win-win solution for both sides...If this deal works, it would be

great. Many of these graduate students come from diverse backgrounds, involving areas other than language. My thinking is students can help editing based on their prior expertise.

The issue of editor quality and editor shortage came sharply into view in this session. In addition to these two emerging issues, I also noticed the shifting of Doris' knowledge community to include her former colleague. I again attribute this expansion to Doris' sense of community and her effort for the betterment of OOPS. In addition, Doris also revealed to me that our extended engagement influenced her action to contact her colleague. Through Doris' acknowledgment, I realized that our sharing of our experiences and responding to each other's stories indeed formed our knowledge community. I also started to observe the different sources of narrative authority exhibited in Arnold and Doris. I continue to focus on Doris'; Arnold's narrative authority will become clearer later.

#### *Doris' Reaction to Public Criticisms*

After Doris' and my special Skype session about quality in September 2005, I went to sleep. While I was sleeping, more postings were exchanged online. When I woke up the next morning, I routinely went to the forum and checked for new postings. An anonymous visitor had posted a message regarding some translation issues involving a particular course. Upon closer examination, I quickly realized this particular course was translated by Doris. Immediately I experienced considerable tension. How would Doris react to this public criticism? In our conversation just yesterday, Doris expressed her resentment toward this anonymous visitor. One of Doris' arguments was that these people offer only criticism but not concrete suggestions. Now this person, assumed to be the same individual, not only pointed to a particular course and singled out a couple of

sentences, this person even offered his or her suggestions for revision. As I read down the thread, in no time I saw Doris' reply. In Doris' reply, she thanked her critics and emphasized that such a constructive concrete feedback was exactly what OOPS needed. "What a show of professionalism on Doris' part," I remember thinking to myself. After reading the forum, I checked my email. Sure enough I found Doris' email, copying me an email she had sent to Luc. In this email, Doris revised those translations based on the visitor's suggestion and asked Luc to revise them on the web site. In the following email exchanges, Doris shared with me her reaction to this incident.

Doris: I think it's the same person who criticized OOPS and pointed out inappropriate translation. His assumption that OOPS does not see translation as a serious matter is the reason why he came up with such comments. Anyway, I'm glad that at least he pointed out something specific rather than pure criticisms.

Grace: You seem to take this very well. I am not sure I would be as cool as you are. Not initially anyway. After cooling down, I might say to myself, okay, this is all for the betterment of OOPS. I remember that the first time I posted a translation question, someone said I did not do a good research on Google. I was very angry, but then after that, my Google skill seems to have improved. ha!

Doris: I'm always open to people's suggestions as long as they are constructive and really do OOPS good. Do I look like a narrow-minded and arrogant person to you (HaHaHa)? I had some concerns about my translation for the sentences that guest pointed out when I emailed my 1st draft to Luc. Unfortunately, the editor wasn't of any help, so he/she couldn't fix the problems. Don't get me wrong. I'm not blaming the editor who may have done his/her best. I'm responsible for my work and I'm really glad to accept the guest's much better version. Another good lesson for me, right? This experience also reminds me of my own constant revisions of my translation work. Let's take the long chapter from the course called "China in East Asia," for example. I myself have revised some areas even though the editor didn't see the need to do so. I can refresh my view to revise my own work now...I'll accept what I think is good for

me and for OOPS and ignore others when necessary. Somehow I think the guest was kind of friendly while pointing out my "inappropriateness" in translation. He could have been more critical and sarcastic, but he wasn't. Am I thinking too much or what? Hmm

...

It seems we-you and me-have more interesting topics and issues to discuss. HaHaHa! Two bored women!

Before I had a chance to reply, Doris sent another email to me

Doris: I just checked OOPS' discussion forum, and the "guest in the dark" pointed out another course out of random choice to have another let-us-find-fault activity. Some people may feel offended, but I don't. On the contrary, I think it gives everyone a good opportunity to brainstorm how to approach translation more appropriately. Of course, I agree with Galatea (another volunteer who responded to the guest's comment) that everyone has different interpretations and translations for the same term. In my opinion, the better or more appropriate translation which fulfills the principles of translation prevails. I think the guest's translation is more appropriate and concise than mine. Why not accept his/hers for the betterment of myself and users?

I have been very outspoken lately; not sure if you are the one who influences me. HAHAHAHAHA!

Grace: You always seem very open minded. It is I who am not quite there yet. :-) ... I agree that feedback like this, and the reaction from the translator (you in this case) provides a very positive example of professionalism.

OOPS is going to be very interesting for a while, I think. I am glad you find our interactions interesting. You have given me many ideas that I probably would not have thought about myself.

Sometimes I wondered why I am doing what I am doing.....:-) Maybe because we are all nuts! ha!

Doris: I totally agree with you that both you and I are intellectual nuts that the world seems to lack. Ha!

I was delighted to see that Doris reflected on our exchange and acknowledged that those exchanges might have influenced her actions on the OOPS landscape. Doris' comment confirmed my belief that we indeed have established a safe place: our knowledge community where we can also see some playfulness in our conversations. However, I also started to question the notion of safeness online. To me, this incident was not something very pleasant - if it were to happen to me - even though it was constructive. This incident raised the question of "what would be considered a 'safe' place online?" Can we consider the larger OOPS community our knowledge community? In this example, new meanings were negotiated between Doris and this anonymous visitor. Can we say, then, that the OOPS community was also our knowledge community?

While Doris continued to involve me in her knowledge community where she interacted with people such as Luc and her friend in UK, I had never directly exchanged messages with Luc and Doris' friend in Doris' knowledge community. Most of the emails Doris had exchanged with them were forwarded to me by Doris. For example, Doris forwarded me yet another series of emails, exchanged among her, her friend in UK and Luc. Doris initiated the email by asking her friend's opinion about translation quality. From our prior conversation, I knew Doris' motive was to get an objective opinion about translation quality from someone she considered a top professional in the field.

Doris: On various occasions, different people have raised their questions and doubts about OOPS' control quality in translation. As an expert in the field of translation and translation studies, how do you see this issue? For OOPS, do you think it is of paramount importance to come up with translation that fulfills the standards of professional translators? Or as long as the content is not misinterpreted, can the perfection of translation be compromised? Thank you.

Doris' friend: I really have no answer for this. This situation is the most difficult dilemma to be in. Given the fact that OOPS is a volunteer-based project, I really wouldn't point any fingers on the quality issues, though it's very important. My personal view is this: if quality is to be top priority, OOPS must slow down the translation production process, including assessing the abilities of the translators and the editors. This is not to disrespect the volunteers, but to respect the efforts that are required to produce good translation. If less production time is preferred, then poor quality is unavoidable, in which case, I personally wouldn't blame anyone who volunteered to do the work. I know it's hard work. The only thing that OOPS may want to consider if the latter approach is taken is: is it worth doing if the quality is not good enough to benefit the users?

Luc: I have a more rebellious view for this. OOPS' problem is not speed, but not enough volunteers who can be editors. Even if we slow down.....actually OOPS is in a slow down situation, we constantly have over 200 courses waiting to be edited....:>

So, what we can do now, is to show the process the course is in, to notify the user that "You always have to take it at your own risk." I think normally a hard copy translated book is in the same situation, but just not as honest as we are...:>

In this exchange, I began to see that Doris' knowledge community also involved a past relationship that was not derived among the OOPS volunteers. In Doris' forwarded email, she commented that her friend's feedback "inspired me to engage more thinking about what OOPS wants to accomplish on its priority list. I'm glad that he sees OOPS from quite an objective viewpoint. What do you think of their thought-provoking responses?" What do I think? I suspect the issue of quality will never reach a solution that satisfies everyone. For example, in one of the earlier email exchanges, Doris once indicated that all translation "is a form of creation," and went on to say:

As an editor, I try not to revise the translator's work too much unless it's necessary to do so, such as he/she got the translation of a term wrong. I think any piece of translation is a form of creation and thus a translator's work and efforts need to be respected and appreciated.

Translation is a subject matter that needs to be learned and practiced. One may easily understand an English article, but may find it difficult to explain it word by word or sentence by sentence in Chinese because receiving language input and producing language as output are two different processes. Translation requires one to receive L1 (language 1) and produce L2 (language 2). As a qualified translator, one needs mastery of both languages at a certain advanced level. I myself have never had any practical training in translation though I wish I had some. I'm still learning how to do a better job in translation from my involvement at OOPS as a translator and an editor.

If translation is a creative process, then what would be the criteria for judging quality? On the other hand, Jessie, also a translator and editor, took on a different perspective. Jessie, through email, shared with me one of the heated discussions in which she had participated. The discussion was about translation of terms related to international justice. During this discussion, Jessie decided to contact the original professor at MIT to clarify the true meaning of "organized institutions" within this course context. As the discussion became heated, Jessie posted on the forum, on July 22, 2004,

What we are doing here is translating, not discussing or analyzing. Respecting the original should be strictly followed. We are translating others' intellectual property. I would mind, or even object to, someone changing my lecture notes without consulting me first. What reliance could anyone place on the accuracy of a translated work if the translator was free to change the original?

There is plenty of room for discussion. While one may not necessarily agree with everything that one is translating, one needs to respect the original just the same.

Translators perform a technical task not a creative one. We are there to render something from one form to another not to create something new.



In a sense we are like the PC on which I am now typing. It translates my thoughts to text. I would have it repaired if it started inserting text which I didn't type

Many translations contain translators' footnotes to indicate errors in the original text. These are provable errors of fact. They do not contain the translators' opinion of the work. This is usually confined to a preface or introduction and is a separate document, under the signature of the translator but may be bound with the translation of the original text.

In Jessie's later private email to me, she expressed:

I was happy to see so many people take part in this discussion; however I felt that some people were anxious about "winning" to the point of being rude and arrogant. This, of course, is my personal opinion. Translators perform a technical task not a creative one; however, I have the impression that not many agree with this point. Some seem to think a translator can introduce their own opinion of the work or correct what they consider a mistake at will. This is simply wrong!

It seemed to me Jessie focused more on the accuracy of the translation in terms of staying true to the original. Doris, on the other hand, believed any translation is a form of creation, whereas Jessie assumed each translation is a technical task. Does this mean Doris and Jessie were at the opposite end of a continuum? The range of opinions offered online, as well as through interviews with Arnold, Doris, Jessie and Luc, led me to believe that a single definite answer to the quality issue may never be reached. I thought about the famous Linux Law: "With enough eyeballs, all bugs are shallow." Can we confidently say within the context of OOPS that "with enough eyeballs, all quality issues are shallow?" At the root of the issue of translation quality lies the question of whose knowledge is best and why. How should that be determined and who should determine it? The increasing negotiation of meaning among members of the OOPS community in our local situations continued. Obviously, there were many dimensions to the quality issues.

These many dimensions created tensions in the OOPS community as well as produced shifting relationships in many of my participants' knowledge communities as their knowledge and awareness of possible pitfalls increased. As they sharpened their understanding of translation from both translator's and editor's points of view, their growing knowledge simultaneously shaped OOPS as well as their practice in their particular community. Their community helped move OOPS from a group of people organized around a common task into a knowledge community (Craig, 2004).

#### Narrative about CORE and OOPS

When I had my first Skype conversation with Arnold in early May, 2005, I just wanted to let the conversation flow at first. I wanted to see what some of the issues were that interested Arnold with the idea that maybe I could probe further from there.

Arnold: In my view, OOPS is too big. I read some of the discussions and such. It appeared to me that Luc wanted to do not only translation but also education.

Grace: I wondered why it hasn't happened. Even though we have courses online almost everyday ...

Arnold: But they are all level-one content. In January, I did an analysis on the OOPS updates. I found out that the majority of its updates were either media coverage or level-one content. The finished courses were only a few. In other words, the practical use is limited yet OOPS' [perceived] influence seemed to propagate well.

Grace: What was the purpose of your analysis?

Arnold: I once visited CORE in Beijing. CORE was making slow progress. They consulted with me about my ideas. I offered my viewpoints and they asked me to give them a report. CORE's slow progress was due to its demand for quality. However, I suggested that they should consider using volunteers. Luc allows courses online with only level-one content whereas CORE required the completion of the entire content at once. In

addition, in CORE, each course will have to go through three reviewers. OOPS doesn't do this.

CORE stands for China Open Resources for Education, an institution-sponsored, government-approved organization to promote OCW in China. In addition, it also aimed to bring China's quality educational materials to the world. Established in September 2003, the same month when MIT officially announced its OCW courses, CORE launched its official partnership with MIT from the beginning. CORE also translated OCW materials into Chinese. I first became aware of CORE through the OOPS web site. My initial reaction, like that of many others, was to question the coexistence of both CORE and OOPS. My initial understanding about CORE also largely came from the online postings, which were mainly written by Luc. Early on, I formed an impression that Luc was willing to collaborate, but it was CORE that seemed reluctant. As interesting as this CORE-OOPS saga was, however, I initially did not want to pay too much attention to its development. Like Arnold expressed in the logo voting message, there are many sensitive political and cultural differences between China and Taiwan. Politics was the least of my concerns in my inquiry. Or so I thought. In addition, I imagined an unspoken weirdness between me and my China participants if we addressed this issue directly. Nevertheless, the reference between different countries of Chinese set the stage for contrast. The issue that rose to the surface demanded attention from OOPS community members. Hence, when Arnold mentioned CORE to me the first time, I was cautiously curious about what he had to share. I asked Arnold if he would be willing to share with me that report, and he agreed. After our Skype session, he emailed me the document.

Even before I had seen the document, I was already impressed by the fact that Arnold did a report on CORE and OOPS. To me, this meant several things. For one, Arnold must certainly have spent time thinking about CORE and OOPS to even create a report. Two, I was not the only person who spotted him as someone with great thoughts. I eagerly opened the document and was intrigued by what I read.

It turned out Arnold had also volunteered for CORE and had turned in the same piece of translation to both organizations. Asked by the CORE personnel, Arnold compared the two groups, based on his first-hand experience working with both. In this four-page document, Arnold detailed his understanding of the similarities and differences in translation, quality control, and media coverage between the two groups. Arnold praised OOPS success in promoting the project and cited this as an area of improvement for CORE. However, Arnold also critically analyzed three sources of misunderstandings among OOPS users: (1) translation had quality issues, (2) the east and west cultural differences caused confusion in translation, which in turn caused learner misunderstanding, and (3) OOPS published materials online even with only level-one content. This practice created more misunderstanding among the users, who thought of OCW materials as only outlines. Using the available online data, Arnold created an Excel chart, detailing the number of materials published monthly, broken down by level-one, level-two, completed, and media coverage. According to his chart, OOPS level-two translations lagged behind and media coverage at times seemed to overshadow the real course content. In Arnold's view, it was not a very honest practice for OOPS to announce courses when only partial content was translated.

*Arnolds' Comparison of CORE and OOPS*

I found Arnold's analysis refreshing. As a researcher, I did not even think about looking at those online data. The data did reveal some interesting phenomenon worthy of further investigation. Based on this document, we started our second Skype session. I again choose to present a large chunk of our conversation in its entirety for several reasons. This conversation might appear a little more controlled or rehearsed but that is only because our comments were derived from the document Arnold had shared with me prior to this conversation. I asked for already-documented details first as clarifying questions and second as a bridge to other emerging issues. I think it is important to understand how Arnold brought the CORE-OOPS, China-Taiwan issue to my attention and what I had learned from him. Readers can observe Arnold's view about authority and organizational structure and how both were related to the issue of quality.

Grace: How did you get to know about CORE?

Arnold: A link from the OOPS web site. It was about mid September 2004. I had already finished the translation of 15.812 so I emailed CORE. They then said we also have 15.180. Why don't you go ahead and translate that as well?

Grace: I heard CORE started using volunteers?

Arnold: After my suggestion. But CORE still mainly relies on universities; volunteers are supplementary.

Grace: Anything different in your involvement with both entities?

Arnold: The similarity is that both sides make slow progress. It took me about two months to translate. My translation quality seemed okay based on the feedback from the OOPS editor that I had received so far. But I think if OOPS had more professor reviewers, the progress could be better. Overall, both entities are very slow. If everyone put forth their efforts and time, like I did, we should be able to see several hundred courses online in six months.

Grace: Why have both sides made such slow progress?

Arnold: I cannot really say. Maybe it has something to do with individual differences

Grace: In your report, you wrote “CORE requires contributions from member universities and their faculty. This condition, to a degree, guarantees the quality and rigor of CORE translation.” Why do you believe university professors can guarantee translation quality and rigor?

Arnold: University professors are the ones teaching these courses, and so the materials will be used at universities. Here in China, we have high respect for teachers; one of the reasons is their rigor in their respective field. Someone who learns the content on their own won't have such rigor.

Grace: What do you mean by rigor?

Arnold: Correct technical terminologies. Also rigor means – like my analysis document. I indicated clearly each source of information. A person without academic training may simply speak their mind without following such a format.

Grace: I understand. So you think if university professors review the translation, the translation quality would be guaranteed?

Arnold: Yes, the quality can be guaranteed. Here in China, the China Academy of Sciences (CAS) and universities have generally been regarded as the highest academic standard. If they cannot guarantee quality, no one else could. For example, the term “marketing”, if CAS decided it should be translated to “市場營銷”, everyone should follow this translation. This organization has the authority to make the final call as to the correct terminology.

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Grace: Then how about OOPS?

Arnold: OOPS has only one reviewer for each course, not two or three. So personal bias has a large influence. If you like “市場學” even though most other people use “市場營銷”, if you are the reviewer, it will be translated to “市場學” I think this is a larger problem. Take a thesis defense, for example; usually it requires at least three professors. I think it is more democratic if there is more than one reviewer. Because if we believe only one person has the authority, then there should be no authority.

Grace: In your report, you also mentioned that CORE seemed not to be doing as well in advertisement and promotion...

Arnold: I think they have a 90% failure rate in propaganda. This assessment is based on solid expertise since I teach marketing and I know Luc is very good at marketing, based on the story I told you about how he went about promoting his Chinese translation of *The Lord of the Rings*. Comparatively speaking, CORE has a 90% failure rate. However, in terms of the establishment of infrastructure, in terms of development, OOPS' structure is not very stable.

Take me, for example. Luc and I communicate and he has no way of holding me accountable. Let's say that one day I don't want to do it anymore and leave--what is Luc going to do?

Grace: Can CORE hold you accountable?

Arnold: No, but that is exactly why they take the university route. To me, that is a rigorous infrastructure. Let me use an analogy. The U.S. and Taiwan both have army reserves. If the U.S. ever goes to war, through this well-established channel structure, they could immediately obtain their soldiers. If a procedure is wrong, then its results will be wrong. For an organization to be able to sustain long term, first the developmental procedure must be correct; if that procedure is correct, then the structure must be correct. This is exactly OOPS' problem. It depends on human passion. OOPS has its structure – the Fantasy Foundation. Yet, from the perspective of completeness and sustenance of the structure, OOPS could not stand up to even a single blow.

Grace: What would be this “single blow” that would destroy OOPS?

Arnold: Theoretically speaking, like a building with only one center pole to hold it. Once this pole falls, so does the entire building. What will cause that fall for OOPS I cannot tell, but this is what I think. OOPS does not have a very rigorous organization structure.

Grace: How can a volunteer-based organization be rigorous?

Arnold: I don't think it can happen unless there is a corporate entity behind it to glue all volunteers together. In China, it will be very hard to have a volunteer-based project because there is no way to hold each volunteer accountable.

Grace: OOPS has 800 to 1000 volunteers. In your view, how have we glued together?

Arnold: I think this is a major difference between China and the world outside China. People from outside China have the willingness to volunteer. For example, after I finished 15.810, I contacted

Luc. He told me that the translators have changed several times. At the time, I contacted the team of volunteers, but I never heard anything from them. To me, this case exemplifies OOPS as being not a very stable, not a very solid structure. If OOPS is a stable structure, things like this wouldn't happen. There are times volunteers just drop out. On one hand, how could OOPS guarantee progress if volunteers keep dropping out? On the other hand, once a volunteer accepts the job, they should be held accountable. If a person is so unreliable, how can we trust this person to have academic rigor? This is not a good feeling.

Grace: How do you hold volunteers accountable?

Arnold: Let me use law and morals as an example. Morals stand as the highest point for a person's obligation, ability, etc. OOPS banks on each person's moral standards. OOPS assumes everyone functions at his or her highest moral standard. This is what the world is supposed to be; we ought to be held at our highest standards in terms of morality. But law provides a more complete structure by prohibiting certain activities. If you do it, I will punish you, put you in jail. This is like setting a lowest standard for the mankind. Ideally speaking, holding everyone to his or her highest moral standards is great; but not everyone can achieve those standards. If we set the lowest standard, theoretically speaking we should not drop below the lowest standard; therefore, we have a better guarantee of discipline and academic rigor.

Grace: Someone said OOPS is a utopia, a perfect and wonderful world without a bad person...

Arnold: The world could be seen as very beautiful, but that is an ideal. Like doing business, we sign a contract first.

A contract is like the guarantee by law – what would happen under the worst case scenario? I heard Hong Kong Lee makes business deals over the phone. We all like the best case scenario. This is based on both sides' moral standards and on the protection of the law. But once he doesn't trust the other parties, he will then have them sign a contract too. OOPS doesn't have a way to hold volunteers accountable. This is why OOPS cannot have a better progress control. This is the very issue.

Grace: But CORE couldn't hold you accountable either.



- Arnold: Not me but others because they work with universities – top down model. In theory, this top-down model is great, but not necessarily in practice.
- Grace: What kind of problem arises with this top-down model?
- Arnold: It is very slow. It is a great idea to have three reviewers for each course. In my case, if I could finish the entire translation in two months, I should be able to review it within 2 months.
- Grace: So CORE still cannot ask you to finish it within a time frame.
- Arnold: But this is not a structure problem; it is an individual difference problem. Also this is a “face” problem. If I am in authority, I can ask you to give me a hand. I can say if you don’t accomplish it, I will use the law to punish you. But CORE basically doesn’t have this authority. They hope to work with universities to go from top to down. This resembles the obligation that teachers have to go to work everyday. It is a rule that everyone follows.
- Grace: Go from top to down?
- Arnold: Even like me going to school. That is a rule that was implemented from top down. You are within an organization; therefore you have to follow the organizational rules. So I go to teach because of the rule. I also go because of my good intentions--I think that is my duty as a teacher.
- Grace: So you think this kind of top-down organization is better?
- Arnold: Like I said earlier, it is like the guarantee by law ...
- Grace: That you can only go as low as the lowest standard?
- Arnold: In theory, but in practice, it doesn’t always work. Even when there are laws, people still go kill others. But they will be punished. But without the law, the situation will be even worse.

I sensed that Arnold believed in a more institutional approach to collaboration. He seemed to favor the top-down authoritative approach, and he mentioned the three-reviewer process as superior in quality. Arnold, however, acknowledged that such a top-down approach also suffers slowness in making progress. CORE’s three reviewer-approach is very similar to the three blind reviewers that most of the academic journals

employ to ensure publication quality. Similarly, most academic publishing requires a prolonged process. Can we give up on quality for speed? Or can speed be improved without sacrificing quality? Can we learn something from the failing of Nupedia.com and the emerging phenomenon of Wikipedia? Arnold also brought up the difference in volunteerism in China and Taiwan. I puzzled over what Arnold had shared with me: what is better? Top-down or bottom-up? Even though I did not expect to get into the conversation about China-Taiwan or CORE-OOPS with Arnold, these topics came up during our interaction. However, I was very pleased they did. I was eager to learn from Arnold because his view of OOPS reflected what might come from someone living in China. I was particularly drawn to Arnold's metaphor of law and morals. I continued to ponder about the notion of accountability Arnold had brought up. Arnold mentioned additional dimensions of the organizational issues between a top-down and bottom-up organization. I did not really get a satisfactory sense of having an answer from the conversation with Arnold. I was left still wondering how either approach (top-down or bottom-up) could hold its membership accountable within the framework of law and morals. Without a contract, without a guaranteed way of holding volunteers accountable, Arnold perceived OOPS as not stable. If so, then what makes open source a successful model when it also relies on volunteers?

A month after the conversation, Luc was visiting Shanghai. Arnold was pretty upset that he could not make it to the gathering. I asked him about his view of the purpose of this gathering. In his email, Arnold wrote,

For me, I guess the meeting/gathering is a promotion... Via promotion, OOPS can gather a lot of volunteers and make the ties more solid. Solid ties and relations are what an organization features. I remember my telling you OOPS does not have a solid tie with those translators while CORE

does. And, on the other hand, via this gathering, the participants will introduce OOPS to their acquaintances and friends. This is WORD OF MOUTH, more effective and efficient than those media ads. Also, the team from Taiwan does have some different ideas and thinking than people from the mainland, and I believe this gathering is a chance to narrow the differences/misunderstandings if any. After all, we live in different cultures, and we have to be in agreement before and during this great project.

Arnold, again, mentioned the potential cultural differences between China and Taiwan. I wanted to know more about those differences from his perspective.

After Luc's Shanghai visit, volunteers from China skyrocketed. This created another wave of debate about CORE-OOPS. Just when I thought I had read and heard enough of everything, a volunteer initiated a thread titled "will there be room for OOPS to survive?" on June 17<sup>th</sup>, 2005. This zealous volunteer, who had notably just joined recently, posted an urgent message. In it, he shared publicly how he had just come to realize that CORE had just began its operation in China. Comparing OOPS with CORE's resources, he was concerned if there would be room for OOPS to continue. Secondly, he questioned if the co-existence of CORE and OOPS was a waste of human resources. As a long-time forum reader, I had seen too many similar arguments brought up before. However, I wondered if there would be different perspectives or new insights in each online posting. I could tell from the long posting that this volunteer had thought about his concern long and hard before he posted his message. He asked about the future of OOPS under the shadow of CORE. However, since he was new to the project, it was obvious that he had some misunderstanding about CORE. CORE was established several months prior to OOPS. This volunteer for some reason thought CORE had just started. He

worried that OOPS had taken the first step but what would be our future be now that CORE had come out.

*Will OOPS Survive?*

I knew what was brought up was not something new. CORE has existed since September 2003. With its so-called abundant human resources, that included top universities and the support from the ministry of education, their potential should not be ignored. However, I did wonder about their progress. It did not seem to me that they had made any significant contribution to the translation. I was pleased to see Luc's reply, a rare long message. Luc explained that he had met with CORE twice and offered to share all the translation and resources OOPS had. He was even willing to let CORE be the only Chinese representative, stepping "down" in this sense. In Luc's own words, however, "CORE refused any possibilities of collaboration, and was not willing to take anything we were willing to offer." Luc went on to address his belief in regard to why OOPS should exist.

OOPS exists for openness and sharing, never for victory, success, fame or recognition. If at this moment we can share that knowledge, more people can benefit from it... OOPS is also undergoing negotiations with MIT about collaboration...But honestly, with or without MIT, recognition is not that important. If you Google or Yahoo OCW, OOPS ranks higher [than CORE]. We can accomplish this. Is it because of government sponsorship or is it because of the collective good will? ...

OOPS cannot guarantee success but we will do our best to put volunteers' efforts into good use. As a matter of fact, I have received many emails from CORE translators who asked for our help. I always tell them to consult our web site directly and they are welcome to use anything we have, no strings attached.

I sincerely hope CORE would have an open community like we do ... I also sincerely hope that CORE would use OOPS' materials....

In the whole world, only the Chinese have two separate organizations of this kind that coexist. The whole world is watching. One organization has money and university support, the other has only a group of good-willed volunteers. Which one will continue? You can choose to stand by and wait, or you can choose to join us.

Several volunteers from China offered their opinion. It was their opinions that interested me the most. After all, how do they feel about “working for” a Taiwan-based organization, especially when a China-based entity did exist? Here are some of the postings posted within the next couple of hours following Luc’s explanations. These postings also offered a rare occasion where Filestorm, Doris and Arnold all participated, Luc was involved, and my name was mentioned. Even though the discussion topic was about CORE-OOPS, readers could also get yet another glimpse of the different motivations of volunteerism.

Filestorm: CORE is a bureaucratic organization, relying on lofty “exterior flag” for money. OOPS is a volunteer-based organization, relying on volunteers’ idealistic fervor. This decisively predicts CORE’s failure and OOPS’ success.... my university is one of CORE’s member universities, but I have never seen any activities concerning introducing CORE materials....CORE takes the approach from the top, making alliances with the top officials in the schools, with the hope of promoting new ways of teaching...Promoting these new teaching methods means to messing up the current status quo, something the top management wants least to see....

Anonymous1: 1. CORE’s target audience is the students and faculty in the member universities. Obviously, this excludes anyone who does not belong to the membership. 2. According to the attitude of China’ students toward government-related activities, I suspect the effectiveness of CORE’s promotion.

Doris: As OOPS volunteers, we should all feel proud of sharing/showing our ambition, boldness, confidence, devotion, efforts, faith, guts, high-spirit, involvement, knowledge, leadership (at present), merits, network (of professionals and expertise), optimism, passion, quality work, responsibilities, support, thoughts, unity, views, wishes, yearning, and zeal with/to the world. There's no j on the list because no judgment should be made on OOPS yet. There's no x on the list because no one's efforts on this project will ever be crossed out.

Anonymous2: Many of my classmates are used to going to different sessions of the same class, listening to the lectures offered by different teachers. I think it is not necessarily a waste of human resources that the different versions of translation could co-exist.

Arnold: 1. The divergence between CORE and OOPS can be attributed mainly to a different organizational philosophy. In addition, both sides share some political and cultural differences...

2. Those of us who are in China might know how much work it is to create a public BBS site. This is not out of line with the civil service's general philosophy that "one task less is better than one task more." This is very different from Taiwan where everyone can just create a BBS site. It is not that CORE does not want a BBS forum; there are regulations.

...

6. CORE follows more rigorously how an organization should function (or maybe everyone prefers the word bureaucracy). That is why they have more meetings, discussions, resulting in a feeling of doing nothing tangible. In my personal opinion, OOPS is far behind CORE regarding having a solid organizational structure... OOPS is now learning from CORE, trying to be more systematic, organized. To me, whether OOPS has room to survive lies in the systematized organizational structure....

Luc, I talked with Grace about this before. I strongly believe that OOPS should try to strengthen its organizational structure. In addition, some content of the media reports were a little messed up.

Anonymous3: OOPS does not seem to have a volunteer shortage. OOPS' problem seems to be that they are unable to effectively organize existing volunteers. There are many

bottlenecks in the current workflow. Luc is too busy. Many volunteers are idle for a long time....

The next morning when I woke up to this mass of information exchange, I was once again impressed by the voluntary involvement of people wanting the best for OOPS. Many people started talking about OOPS' organization issue. Arnold, as he expressed in the posting, had shared with me his opinion about how OOPS's loose structure would not be able to withstand a fatal blow. In a way, Arnold seemed to assert his narrative authority on the basis of our prior conversation. In our knowledge community, maybe our conversation had strengthened his belief and contributed to his value. Taken from a different view, I saw Arnold's mentioning of my name a "check" of his consistency in his belief, whether shared with me privately or expressed publicly online. I don't know if I completely agreed with Arnold's view. I think OOPS' flexibility and spirituality certainly have their advantage. However, the desire for a more organized operation and efficiency seemed in order. I puzzled: how do we capitalize on the flexibility and spirituality of a bottom-up organization and maximize its efficiency? I agreed with Luc that whether OOPS signs an official agreement with MIT or not was not the essential issue. In my opinion, however, the fact that MIT delayed signing the agreement did mean something. Any action, or inaction in this case, meant something. I suspect MIT had its reservations about OOPS, whether it was the issue of quality or something else. There was always room for improvement. Maybe the issue with CORE played a role in this too. I have always tried to avoid talking about CORE since I cannot seem to figure out an "answer" to the situation. However, I pondered that in a healthy democratic society, the government always is composed of at least an opposition party and a ruling party. Both

parties could regulate, stimulate and reinforce each other. If OOPS had no weaknesses and CORE had no merits, there would be no discussion! Tensions lead to growth. If we draw people's knowledge and experience from both sides, maybe we could creatively invent something even better than either CORE or OOPS? Maybe it was time to face the CORE-OOPS dilemma. While this discussion was going on, Jessie and I discussed it in our email exchanges. Jessie, however, offered a refreshing view about the CORE-OOPS relationship.

I believe that Luc has tried to get some cooperation with our colleagues in China. However, they appear to be unwilling to see that Taiwan has a role or anything to offer. They seem to feel that they can manage the whole process without assistance. In order for the discussion to be productive both sides have to want it to be so.

The OOPS project will be a success even if it is only by prodding the people in China to get on with their work. Without the pressure of competition they would probably let the work slip. Either directly or indirectly OOPS will produce a result.

As an example, look at the sequencing of the human genome. It started out as a government project and looked like it would take decades. Then a private competitor emerged. As a result the whole thing was done in a matter of years, not decades, and both sides took a part of the credit.

What did Jessie mean "direct and indirect results?" Jessie replied via email:

OOPS will either do the work in its own right, thereby producing a direct result, or it will force CORE to do the work faster and better in order to prove that they are superior to OOPS, and produce an indirect result

Maybe at the current stage, we should let CORE be CORE and OOPS be OOPS, I thought to myself. My conversation with Arnold about CORE and OOPS picked up three



months later when Arnold saw a China newspaper report about Luc and the project. He emailed me and said:

This is a pretty good newspaper in China. Even though it is a short report, that is pretty good. On the other hand, CORE-maybe because they have encountered internal problems-has not yet reached their goal. I feel pity for them. My course has been reviewed by CORE and is now online...

Shortly after this email, Luc and I went to Utah for a conference. At the conference, I met two people from CORE. Both CORE and OOPS had separate presentations at the conference. In conjunction with the conference, MIT and the Hewlett Foundation, a major sponsor for many OCW projects, initiated an OCW consortium meeting where many of the OCW players were invited. Both CORE and OOPS were among the attendees in the consortium meeting. While I was not invited to the consortium meeting, in this relatively small and cozy conference, I ran into Luc in between sessions or during arranged lunches and dinners. Luc brought with him many OOPS pins and brochures to give out to the conference attendees. Every time I turned around, I would see Luc talking to a different person. By the second day, I was truly impressed by Luc's people skills. Almost every person I spoke to had spoken with him. Most of them were wearing the OOPS pin! People would even spot me and say, "Oh, you are one of the OOPSers!" I felt honored by people's warm reception.

One of the most fascinating phenomena at the conference was that people seemed extremely curious about the relationship between CORE and OOPS. At both CORE and OOPS' individual presentations, the audience members brought up the issue of collaboration. People could not understand why there were two separate entities doing Chinese translation of OCW. At one dinner, I was sitting next to one of the CORE

members, and someone came and sat down right across from us. He waited no time to bring up the CORE-OOPS question. Maybe half jokingly, half seriously, he asked if it created any trouble that two of us, one from OOPS and one representing CORE sat next to each other. I tried to stay out of this kind of conversation since I sensed that there would not be an acceptable or understandable answer for the general public. People who are not familiar with the cultural and political situations in that region cannot understand the potential difficulties and even conflicts between organizations from both sides. Even for people who think they know about that region, I still do not think they can have a full grasp of the differences between two seemingly similar entities. I again turned to the notion of insider-outsider divide and saw yet another dimension of it. The term *experience asymmetry* came to my mind. When there was a divide, whether caused by our task, our belief, or our past experience, at times it was not easy to bridge that gap.

When I returned from the conference, I immediately shared my experience with both Arnold and Doris. Arnold quickly replied,

It's really good news that you all met in the US. Don't know when I will get such an opportunity:( ...China, as one of my cyber friends said, is a magic land, and the media of mainland calls TW a renegade province. Under this situation, some political elements are bound to be considered when mentioning the so called cooperation or something concerning cooperation. For our ordinary people, to see Li Ao coming to the mainland and to see him being allowed to deliver his speech is really a gift that we may not even dare to expect in some time ago.

Personally, I don't think OOPS with its current resources can achieve as much as it is expected to by many people, because it has innate limitations while CORE enjoys a great deal upon its establishment. I don't mean cash or government support by saying this. But I also cannot expect so much as I did before submitting my courses that CORE will complete what it should have done. A solid proof is that the online course schedule is not as they planned. They are also late. I understand the reason, and I thus keep

myself optimistic for the organization's future. They lack the correct HR although they don't lack nice HR.

At the Utah conference, a MIT professor told me that he was interested in the comparison of OOPS and CORE. I was not sure I wanted to do this even though I was personally interested in the development of both. In addition, I did not have access to CORE, which might give OOPS an unfair "advantage" in this comparison. On the other hand, I think the "comparison" was quite obvious for everyone to see. Nevertheless, I did not want to get into this tricky business. In my personal opinion, both had its advantages and challenges and both were trying to maximize advantages and solve challenges. Interestingly, by talking to CORE members at this conference, I realized that both CORE and OOPS faced one similar challenge - the shortage of editors. CORE required that each editor be a professor who would be paid for his services. OOPS did not require someone with the "Dr." in front of their names, but we still cannot find people to perform the task. The problem seemed to be that the editor would rather translate. The thinking is that if the translation quality was not good, editing was more work.

Luc never seemed to really provide an answer as to why there was an editor shortage. Doris, however, did provide her perspective. In one of Doris' emails to Luc, an email later forwarded to me by Doris, she expressed,

The issue of recruiting qualified editors has been brought up and discussed in the Skype conversation between Grace and me last week. Like you said, she also wonders why OOPS has difficulties recruiting editors. In my personal opinion and experience as an editor for OOPS so far, editors are doing both the translation and editing jobs. Courses assigned to an editor may not be in the academic fields that he/she is familiar with even though you have asked for an editor's preferences in advance. When editing

courses in political science or literature, I usually do some research on the internet for background information while working on editing for accuracy and fluency of translation. Since I'm not so familiar with the subject, I have to be cautious not to misunderstand and/or misinterpret certain field specific terms or ideas. Fortunately, most of our translators that I have worked with so far have pretty good quality in accuracy. Most of the time, I just help a bit with the fluency in their translation without making too many revisions, in case translators may feel upset or discouraged. This is the way I work as an editor.

A translator usually adopts a course he/she is familiar with or has an interest in. The main focus is to translate the content into Chinese, period. He/She may have not even have to spend time researching on the internet if such a subject belongs to his/her academic/professional field. Compared with the process of editing, translation is very straightforward.

The CORE-OOPS debate intensified and forced the community to think beyond our immediate duty of translation. What were some of the direct and indirect impacts OOPS would have, on whom, and in what way? The issue of cultural and political differences continued to be in the focus throughout the discussions. For the first time, I gained some better understanding about the challenges CORE faced, which to a large extent, were similar to those with which OOPS had to wrestle. For the first time, I also gained some international perspectives on how others saw the CORE-OOPS development. For me, the OOPS landscape had expanded beyond our task at hand to include many external influences. I wondered how these external forces would help shape the OOPS community? Furthermore, when Arnold made his belief public in the online forum, his belief that he had previously shared with me in our private conversations, I was delighted. Not only was Arnold consistent in his remarks, I had an additional piece of information to learn from Arnold. Both Arnold and Doris, on various occasions, had mentioned my

name. It seemed that they felt that mentioning my name, it gave them the extra authority to say what they wanted to say. I wondered why.

*Arnold: It's Just Like a Marriage...*

Regardless of the reasons behind the editor shortage, however, an idea rose in my mind. What if OOPS focused on translation and CORE concentrated on reviewing? After all, OOPS had many volunteers and CORE was better positioned to recruit faculty members. I asked Arnold about this idea in my next email. In addition, I also followed up on Arnold's notion of "the lack of the correct HR although they don't lack nice HR" from his previous email. Moreover, I inquired as to what Li Ao's China visit symbolized. I asked if Arnold could help me understand all these questions. In a series of emails, Arnold and I exchanged our thoughts.

Grace: What I would like to see is for OOPS volunteers (since we have so many) to translate, and for CORE to find professors to edit (since CORE has access to them). This sounds ideal in my opinion. But I think I understand the "renegade province" issue (even though OOPS is really a grassroots effort, from people like you and I, not related to the government). What do you think?

What do you mean "They lack the correct HR although they don't lack nice HR."? Do you mean they are nice people who don't know how to do PR?

Excuse my ignorance, what did Li Ao's visit symbolize?

Arnold: Yes, CORE seems not to have inspired enough of its members, by which I mean they have HR, but not the right HR. Also, I mean they may not be as good at promotion as Luc is.

I have thought of this cooperation, but I did not mention the detailed plan with CORE because the cooperation of translators and editors, or let's call it "a share plan" seems not feasible at present. To some extent, it is still a plan or idea on blueprint.

Li's visit and his speech may mean our government is turning to the democratic way, and it is open to different or even bold opinions.

I do not know if one person's one-time visit would have any visible impact.

However, I was more interested in why this "share plan" would not work? I asked Arnold to elaborate. In my view, it sounded ideal.

Arnold: The share plan between OOPS and CORE should have been in progress if it is feasible from the beginning. I cannot foresee the future, but at present and from my experience, it is not workable now. The biggest problem is who has the final say-for the un-translated works and for the already-translated ones?

Grace: My naive thought was that the "politics" got in the way of a very innocent possible collaboration. You know, the China-Taiwan politics. But what do you mean by "final say"? I thought the spirit of the project (both projects) is open and sharing. Isn't it the "people" who have the final say about how, where, when, and what? Oh, maybe you are talking about "power" - who is the boss? hmm ... that could be a tricky issue. I see. Both OOPS and CORE want to be the "boss." hmm... Interesting...

Arnold: To share, a group of people need a director who may collect everybody's ideas and everyone is equal. But to cooperate while only one party is focused strictly on 'sharing' while the other is focused on the opposite function may go nowhere actually.

I cannot say that both of them will not cooperate or there is no possibility of such things, but there must be some triggering event or something like that. I cannot see anything that would render both parties unable to manage without the opposite function or approach. It's just like a marriage: marriage is necessary more because I cannot be without you and only you than because I love you. Is there anything that will make them feel or MIT feel they must be together? No, at least from my viewpoint. MIT does not care about the localization of courses in China or Chinese-speaking areas. What it cares about is the spreading of the material and the MIT-way.

Also, I guess OOPSers and COREers are not sure about the future of MIT materials. They know, and everybody seems to know, that there is a giant, big, huge and very fantastic future, but the problem is when and how and with what cost can WE, the common people, get to that future? They cannot foresee this. They cannot tell us about this, either. If both parties have a clear

plan, then with a nicer environment emerges, WE may go somewhere instead of almost nowhere as we are now.

Arnold's email provided me a very different view on the issue regarding collaboration with CORE. I had to agree with him that there was no need to collaborate. Using Arnold's marriage analogy, both sides can live happily and independently, at least for now. However, I sensed that the OCW consortium felt differently. For example, people at the conference could not understand why we were "doing the same thing" and expressed the concern that "it is a waste of human resources." These kinds of questions were brought up at CORE's presentation, at OOPS' presentation, at dinner tables, and in conference hallways. It was obvious to me that CORE was down playing its "translation" efforts while emphasizing its other China-wide "quality education" initiatives. These were things I don't think OOPS was in position to promote in Taiwan or China. But how about this notion of "a waste of human resources"? I asked Arnold about his take on this question. In addition, I invited Arnold to elaborate on his last point in his email - that we are "nowhere." I wondered if Arnold saw the "future" as a fixed end goal. How about the process of getting to that future? Does this process count for something? How has Arnold accounted for his involvement with both CORE and OOPS? What has that meant to him? Arnold replied quickly.

There is only one answer to all these questions: people from two sides of the strait share different ideologies. What we can do, how we do things, and the end results will not be the same. Luc and I are the same age. I also had similar ideas years back. However, he can make certain things happen while I am still standing still. I started experimenting with online education seven years ago, but there were certain obstacles. If Luc were in China, if Luc were also a member of the ...he would not be able to do anything either.

As to the issue of waste of human resources, it is a must. This has to do with different ideologies. China's bigger climate influences how CORE is doing what it is doing. Taken from a different perspective, however, CORE is making its compromise, aiming for the future....When facing pressure, some people, such as myself, can do nothing but give up. Some people chose to compromise or surrender due to the lack of real substance, but others choose to compromise or surrender in order to make substantial progress in the future.

From the international perspective, people do not understand the ideology differences. On the other hand, CORE and OOPS are at a different level, meaning, therefore, that there is not a waste of human resources. For example, the U.S. has its army and China has its army. This is not a waste of human resource because each serves its respective country. Soldiers strive for peace, but not for the same country. If there were no ideology differences, maybe CORE would have worked with OOPS before OOPS conceived its name... A side issue, I think Luc used some trick in his promotion of OOPS.

The ideological, political and culture differences between China and Taiwan was in sharp view in the above-mentioned messages. Arnold claimed his narrative authority as the "China expert" in our knowledge community. He educated me that things may not be as straightforward as someone who is from Taiwan could understand. He even compared himself with Luc and asserted how those differences might have enabled Luc and at the same time hindered him. My conceptualization of experience asymmetry was again evident between Arnold and me in the China issue. In the end, however, it was Arnold's view about Luc's "tricks" in promoting OOPS that had gained my attention.

*Arnold: Luc has His Ways of Doing Publicity*

I was not surprised at what Arnold said. I, like Arnold, was fully aware of the many differences between the two sides. I, however, was pleased that Arnold was willing



to share with me his thoughts regarding this very sensitive issue. At the end of the email, Arnold dropped another bombshell about his disagreement with some of the ways Luc promoted OOPS. Arnold had hinted at this issue several times but I had never followed up with him. I sensed this time, however, that this issue about promotion had something to do with the CORE-OOPS relationship. I decided to probe, and Arnold replied via email.

I think Luc should not do certain things while promoting OOPS. Remember the analysis report I shared with you? I did not write in that report some of the approaches Luc used. I am the same age as Luc; I am also interested in OCW; my field is in marketing. Luc's promotional approaches were not strange to me, but I felt they violated certain business ethical standards. I did not write this in the report [that I had shared with you] and did not share these "promotion-war" techniques with CORE because what Luc is doing (OOPS) is a noble cause, only he over-emphasized publicity.

By over-emphasizing publicity, did Arnold think Luc also jeopardized speed and quality? I wondered about what was not said here. Arnold continued in his email:

Currently CORE must have run into difficulties due to their lack of pre-planning, lack of understanding of China's bigger environment. In addition, they do not have someone as thoughtful as Luc who can devote himself entirely to this project. (I once thought about going to work for CORE. But the big system in China immobilizes me, so I had to give up the thought.) I think OOPS' future is not optimistic either... Luc has over extended OOPS without enough resources to support it. I am afraid OOPS will end without success. What a pity due to the division of the strait. Otherwise both could collaborate... I estimate some triggering event has to happen to break the current standoff.

I think Luc was both thoughtful and strategic. I could see Arnold's point. He had not necessarily criticized doing promotion but instead what was said during promotional

activities. In a follow up email, Arnold went into a little more detail about what he meant by “unethical approach.” Arnold indicated that some of the Taiwan newspaper reports, in which Luc was interviewed, said things such as that CORE refused to allow volunteers to be involved, that CORE received a large amount of money from the government, that CORE wasted much of the taxpayers’ money. In Arnold’s view, media would not know about these details or write such one-sided stories, if this information were not supplied by Luc. More importantly, Arnold argued that these statements were simply not true. He could understand that OOPS was trying to gain public recognition. However, such a desire should not be achieved by inappropriately attacking the other side. I remember that a while back, Arnold had mentioned to me that he once saw Luc on a television show. In that show, Luc shared with the audience how he went about promoting his books, *The Lord of the Rings*. Luc’s approach was described by Arnold as a little “cunning.” I did not probe further at the time. In this email, however, Arnold gave me a deeper sense of that incident and revealed more openly his views on Luc’s marketing approach.

I have to admit that Luc has his way of doing publicity. However, just because I am also in the field of marketing, I don’t appreciate some of his approaches. In the television show, he mentioned his method of promoting the books. They were very result-driven approaches but with the flavor of being cunning. OCW is an academic and social service. His publicity stunts somehow altered the flavor of the project...I feel right now that the whole OOPS operation seems to emphasize publicity more than education. Maybe this is due to the ideology differences between two sides of the strait. Maybe this is how it should be handled in Taiwan. Therefore, I did not share my feelings in my analysis [report submitted to CORE], nor in my online postings. I did not even share my thoughts with CORE. From the beginning, deep inside, I still hope both sides could collaborate one day. I even suggested this to CORE.

I was very pleased to read Arnold's email and truly appreciated his openness in sharing his view about Luc and Luc's marketing approaches. I especially valued Arnold's view that OOPS might have been over-commercialized. What Arnold said in this email reflected what I had been personally wrestling with. I think Luc put too much energy into marketing. I wonder if it was because marketing was what Luc was good at? Maybe he received a sense of accomplishment by doing this. He liked the spotlight; he liked to meet people. He liked doing certain things. This was reasonable, though. Arnold also raised a concern that had been in my mind for a while: OOPS should focus more on education. Much needed to be done. I often wondered about Luc's blind spots. He was a human being after all. Who was going to help him to see things he cannot see himself? My personal frustration grew when many of my suggestions (and those of others) went nowhere. It was unclear whether Luc did not like the suggestions, or whether he did not have the resources to take care of those suggestions. It was unclear to me what Luc's priority was and how he made those decisions. Here, I also saw how Arnold told different versions of the story to different knowledge communities. I believe one of the major reasons behind Arnold's choice resided largely in his hope that two sides might still work together one day.

Doris also shared the concern about how Luc balanced his time and energy.

However, Doris's concern took a different turn than Arnold's.

Doris: I don't think that he has a think-tank with whom he can consult...Since we are all volunteers, based on my understanding, I think Luc is the only core personnel. I believe Luc does all the overall organization and planning.

Grace: Are you not worried about this situation?

Doris: I am not worried about his ambition. Like you said, he is a character. I think he is a character. If he uses his persona, I think

he can attract many people. But after they are in, as we discussed before, the question is if and how we can keep them. I think Luc does a wonderful job of recruiting volunteers, using his charisma, his talking. But after that, there is not a person or a group to provide backup support. Once they are in, how can we keep in touch with them, through email, gatherings, dinners, etc.? We need an organized way to keep volunteers together...All the energies are utilized in recruiting work to get these people. People are OOPS' property. Proper utilization of our property will help OOPS progress. But my feeling is, that once we draw them in, like you said happened with the three volunteers you met in Montreal, without more available courses to translate, they are not active now. That would be a pity since, after all, they are still professionals in that specific field. If someone could keep track and keep in touch with them, when we have new courses available that are in their field, they could be informed and invited to come and take a look. Luc does the pre-sell PR job. But no one is doing the after-sell PR job. But I think this is rather important. We need a mechanism to sustain these people. If a volunteer said she or he only likes vegetables, and if OOPS has new vegetable, we should let them know. If they like Tofu, we let them know when we have new Tofu. No one is doing this work. These volunteers are already here; we need to keep them.

...

Human beings are emotional. If they have the sense of belonging, they might not leave so easily. We work pretty much independently; we adopt, translate, confirm edited versions. There is no interaction among volunteers. Maybe interaction is not most critical. But if we do have such an opportunity, maybe such an interaction could gradually turn into friendship and personal social life. For those who don't want such an interaction, that is okay, but if such an organization exists, then they can come and visit. That would be great.

Grace: Is it possible that Luc has his own blind spot?

Doris: Yes, of course, he will have his blind spots.

Grace: So what do we do? If there are certain things he cannot see or if he won't take suggestions ...

Doris: He will know when the problem surfaces. Until then he will realize certain things are not right. Like I said earlier, most of his energy seems to be devoted into marketing and pre-PR,

which seems to consume too much of his time. As to the post-PR ... I think this is why many volunteers come and go. It has been like this for a long time. He is aware of it, but I wonder why he hasn't done anything, why he hasn't tried to find out the problem? This is puzzling to me.

Grace: As a human being, he has his own blind spots.

Doris: Maybe he thinks his current priority is to recruit as many people as possible. But from a volunteer's perspective, we think you got me in, but you haven't paid very much attention to me. When I have problems or when I have suggestions, nobody seems to want to know. Translation and editing are mostly one-man shows; we do these tasks by ourselves independently. Before I got to know you, it has always been a one-man show. I translated the course, sent it to Luc and that was it.

Grace: But you still persist.

Doris: But how many are like us?

Once the volunteers are "in", these people are our human database.... Maybe Luc does not have extra mind and energy to focus on this area. But I think the total number of people involved in the project is not the most important concern. Instead, I think we should emphasize more the quality of the volunteers. Quantity is secondary; it makes us look good. At a deeper level, volunteers' ability, background, willingness should be of primary importance. If you recruit 3000 people, all of them translate a course and disappear. What good does this do to us? You are constantly looking for new volunteers, and you never know why people quit. Now we have 1500, next year we have 3000, the year after next we have 5000 volunteers. You still don't know why people quit. Will the quality produced by 5000 volunteers be better than that produced by 1500? Not necessarily. Maybe among 1500, there are 50 who are very devoted and active. But maybe among 5000, only 5 that are devoted and active. Which is more important? Quantity or quality?

It was hard to say if OOPS had over extended itself and if Luc had spent too much time on promoting OOPS. What was clear to me, however, was that something more needed to be done in insuring OOPS' success, in addition to recruiting more volunteers. I

would like to see more volunteer interactions and the formation of a more solid online community. Doris worried about the coordination of volunteers once they were “on the bus.” Arnold looked even further down the road, contemplating on the relationship between CORE and OOPS. All of these issues seemed complicated, each with its unique long-term implications. Here, I also learned from Doris that our knowledge community might be one of her sources of persistence in her involvement with OOPS. As OOPS grew and more users joined the community, different possibilities and new challenges rose to the fore, demanding the attention of OOPS’ diverse membership and its over-stretched sole leader. Will OOPS’ over-stretched leader cause a chain-reaction of change like those witnessed in Linux, I wondered?

#### Why bother?

When I first became a volunteer, I spent a lot of time reading through the archived online postings, in an attempt to catch up on what I had missed. Many postings drew my attention, and several have stayed, not only in my memory, but have continued to evolve over the months. The one titled “This is a great idea, but ....” was one of many long-standing threads on the forum. Initiated in early June of 2004, the thread started with a Ph.D student from a well-known university in New York. This person immediately pointed out the main argument: quality is important, but a more pertinent question is why bother translating to Chinese. Claiming to be in biology-related field, this visitor commented that most of the information in this field is in English. If OOPS only translated what was made available online but not the textbooks, then the most we were doing was “translating the book cover and the table of contents. But the content remains in English.” This person went on to suggest that those who really wanted to learn in this

field should “first learn English,” since “I had not read anything biology-related in Chinese after my freshman year in College.”

*The Need for Translation*

Luc was the next one to reply. In his long message, he insisted that “what OCW provides is knowledge, not education. Textbooks cannot replace lectures. These materials will help many people since not everyone can be accepted into MIT or other well-known universities. Even if they were, not everyone can afford the tuition.” Luc went on to explain his view about the value of translation:

English is not our mother tongue. We will have better reading efficiency in Chinese. One volunteer’s arduous translation could help thousands of learners to save much reading time... OOPS is volunteers’ good-will to open a window leading to more knowledge, paving a smoother path to that knowledge.

I was reading these and many other responses with great interest. I did not know where I stood on the issue of practicality and usefulness. Early on, I sensed this would be a muddy issue to discuss. On June 10<sup>th</sup>, 2004, Jessie joined this debate and offered her view about the need to translate. Below, I intentionally include her lengthy posting mainly because it is well written in English. Due to our relatively limited interaction during our research relationship, readers have not heard too much of Jessie’s voice thus far. For this reason, I also felt this posting could provide an example of Jessie’s voice as it was typically shared online.

Often those with the most profound knowledge of a subject are those least able to communicate it. Translating a document is not merely a process of transposing words from one language to another. Were it so anyone equipped with a suitable dictionary could read any document in any language. A good translation ensures that the ideas expressed by the original author are relayed in a style which is natural and easy for the

reader in a second language. Often this will involve subtle changes in the document to overcome cultural differences.

It needs to be accepted that any work is a collaboration. The translator collaborates with the original author. Readers and critics collaborate with the translator to improve the translation. Through a continuous process of collaboration and feedback, the document and the skills of the translator are improved, but never ever perfected.

The need for collaboration and feedback is clearly recognized by this project. It is intended to establish a WIKI to provide a method for readers and critics to submit their valuable contributions.

Be critical by all means. But, don't be negative. Don't attempt to denigrate and belittle the work of others. Rather contribute constructive criticism. Be a part of the solution, not part of the problem. Join in and attempt to influence the process in the directions you feel appropriate. Don't just attempt to stop others from doing what they feel is useful and constructive.

.....

Language should never be allowed to act as a barrier to disenfranchise any group. People should not be required to learn another language as a right of entry. Access to knowledge should be theirs by right of their humanity. Translating documents into as many languages as possible is a democratic act which empowers every individual to contribute to human progress whatever language they speak, whatever their income or social status and wherever they may live.

Some people have the luxury to choose which language they use to acquire knowledge. Others don't. Prejudice against those who don't is an arrogant act designed to entrench a position of perceived superiority by denying others access to knowledge.

Any act, which attempts to limit the spread of knowledge, is both selfish and self defeating. It promotes a few by suppressing the majority, restricts the development of society and results in the impoverishment of all. By reinforcing social divisions it ensures that the elite are held back by the mass. The only way forward is together, mass and elite as one group.

I admitted that when I first joined the project, I really did not put too much thought into what I would be doing. Reading online discussions made me reflect on my



own belief about these issues. Jessie came across as someone with a strong belief in the value of translation and the importance of knowledge sharing. I remember being very impressed by Jessie's posting. In the message, she addressed many dimensions of the project that, at the time, did not even cross my mind. More than 14 months later when I conversed with Doris, we ran across the same topic, the practicality of translating to Chinese. "If we have to wait until our English is good enough to learn, that will be too late," Doris shared. She continued to offer her opinion on the value of translation.

There are many newly published books. I look at those book publishers' web sites. They do lots of translation. Almost at the same time the English version is out, the translation version is out too. Only to people like us—people who have studied in the U. S.-- language might not be as big a barrier as it is to many. Like my sister, she has good English...She has no problem with reading English novels, but for more academic-oriented content, she still feels very inadequate. When she was in college, they used English textbooks too. But they might read the texts without really understanding the material, and the process was very slow.

If you insist on reading English, then there will be a long time-gap before you can gain access to that information. Then this creates a problem in information accessing. You are behind! Maybe in the meantime, everyone else is making improvement and you will be forever behind. Think about why these publishers are doing all they can to obtain the copyright and translate the texts? The purpose is obvious!

I never questioned the practicality of translation until I read the discussions online. When reading those debates, I was searching for my own answers. Like Doris said, being among the privileged ones sometimes blinded my view about those who need language help. Just because I like to read from the originals (English) doesn't mean everyone else could and should. Arnold also agreed that translation is important. However, he cautioned:

... at the beginning, translations are necessary. But later, we cannot take everything in as is. In the process of learning and mastering another language, your thinking must change. Maybe this is the issue of cultural

invasion in that the west, in the process of transferring their knowledge to us, is also giving us their way of thinking. We Chinese cannot lose our own culture, nor become lost at the juncture of “in-betweenness” of two cultures. To eradicate a race is to let it lose its culture.

I fundamentally believed that the work of translation/localization is not only desirable, it is a necessity to help narrow the knowledge gap. There is no doubt that learning is easier in our mother tongue. Culture and language are so closely embedded within each other that the issue of translation/location is not only the issue of language but the issue of culture.

Like many other threads, this thread, started out about the practicality of translation, quickly digressed into the issue of ownership. Someone cautioned the idea, written on the home page at the time, that the project will be donated to our country upon its completion. This person was strongly against “doing business” with the government. Arnold responded next, “Instead of thinking in terms of a country, maybe we are better off thinking of the project in terms of the betterment of the people.” Luc also replied right after Arnold. In his humorous tone, Luc replied, “We don’t take one cent from the government; therefore, we are not afraid of being eaten alive by it...:> In addition, this site already belongs to mankind. Even if I hate you, I must share our ‘fruit’ with you. Isn’t this very interesting?”

In the process of debating the need for translation, the community inevitably touched on the issue of language and culture. It was again Arnold who pinpointed the danger of cultural imperialism in accepting western knowledge as the superior. The questions of the hegemony of English language, the perceived dominance of the western world and the western ways of knowing apparently were not concerns within the OOPS community, but they remained questions to ponder in my head. Along this line of

thinking, I also began to see yet another dimension of the insider-outsider divide: the divide of “producer” versus “consumer.” Suddenly I came to the obvious realization that in OOPS, the producers were the volunteers who were proficient in English. The “consumers” were the users who needed the translation in order to gain access to that knowledge. If this cruel division of producer-consumer stands, then how can we expect the “consumers” to participate in bettering the quality of translation? In other words, how can they question the quality of translation when they need the translation to understand the quality? In this regard, all the meaning-making, self-learning, social constructed knowledge like Doris and I had experienced benefited only those who took part in the interactions. People who were not part of the action, who had never experienced OOPS, who needed the translation to gain that knowledge, were not part of the meaning-making, knowledge construction process. As a result, they were outsiders who might see the end-result as either useful or useless. How can we bridge that divide and allow both sides to share the unique and significant experience that we had envisioned?

#### *Usefulness of the Materials*

I read online postings as if they were the OOPS memories, documenting the interactions before I arrived. I sensed Luc’s wit and the volunteers’ enthusiasm. Many issues were brought up and many opinions expressed that were beyond what I had thought about. A more pertinent issue, besides why we should bother to translate, involved the question of how useful the translation was to learning.

Grace: Most of the PowerPoint files are outline-based. Didn’t you have to guess what the professor intended?

Arnold: Yes, I had to do so. But what was even more problematic was ... I was searching on the Internet and by coincidence I found out that “Combat” has nothing to do with war. It is a brand name for a cockroach drug. But if it were written as an article with

complete sentences, it would be much easier to figure out. I doubt if students can really get anything out of PowerPoint. It will be very difficult.

I thought 15.810 was an undergraduate-level course. When I first started, I thought it was a little difficult. But soon the task became easy. Like jumping, the pole is a little higher, but you just try a little harder and you will be able to jump over it. Then the number of times I had to overcome difficulty became less and less. Then I realized it was a graduate-level course.

Grace: So for a self learner who has no prior knowledge about a particular subject ...

Arnold: It will be very difficult to learn from the materials .....

I often thought about the issue of usability of OCW materials. From my own translation experiences, I was very suspicious of their usefulness. Similar to what Arnold said, I too was wondering about how and if a self learner can take a course outline or a bullet-pointed PowerPoint and study the material. Did I not learn anything from my translation? Of course I did. However, I attributed much of my learning to my prior knowledge. I felt that because I already had a solid understanding of the content, while translating, my prior understanding helped my comprehension, especially at places where I had to make an educated guess as to what the professor was trying to convey. I too wondered whether the material would be suitable for someone who does not have appropriate background. Both Arnold and I had dealt with translating PowerPoint files, which inherently were meant to supplement live lectures. It made sense that both of us felt there was still a gap between the material presented and the learning that would occur. I asked Doris if she had translated or edited any PowerPoint files. To my surprise, her answer was no. Doris told me that most of her courses had homework assignments, short lecture notes, maybe summaries of the readings of the day with discussion questions, a

list of the term paper topics, a list of available resources. Doris also informed me that “not all lecture notes are in complete sentences. Many of them are presented in bullet points, some are in short sentences. Many just list important terms, not in complete sentences.” When asked, “do you think people can learn from the content provided?” Doris paused, “this is such a big question,” and continued,

Doris: I think with only level-one information, nothing can be learned. If a learner is really interested in the course, they can go buy the books or download some of the freely available content (such as those available from Gutenberg). Level-one content is very shallow. Maybe level-two content such as lecture notes and study questions can help learners more. Imagine that a teacher is by my side. The teacher tells me that these are the questions I should keep in mind when I read the article. Then this could be meaningful. For those assignments, oral presentation requirements, etc., if I am not taking the course, that information wouldn't matter to me. Some study guides list the important terms, people, or events. That tells the learners where they should start. Self learners might be able to learn from resources such as these.

Grace: So most of the courses you have edited/translated have these components?

Doris: Most of them do. Like the course of Asian American Study, for example. In the lecture notes with requirements of the term paper, the professor asked many questions for students to ponder and raised issues for students to debate, that is, whether A is right or B is right. Things like this would be very useful for self learners. When courses are presented without these components, the most that self learners can know will likely be the themes of the course, as used in the textbook. That would not be too meaningful.

I also asked the same question to Jessie who had likewise done both translation and editing. In our email exchange, Jessie told me:

It is hard for me to say how useful this material is, as it is often in areas outside of my area of expertise. It is really an act of faith on my part that someone, with the right knowledge and experience, will find the material useful in extending their understanding. Because the material consists of study guides and resources the audience would have to be people with some background in an area who are wishing to undertake further study. I would not see it as suitable for a novice.

In my next email, I asked Jessie why she said those materials may not be for a beginner. Jessie wrote in her responding email:

All disciplines develop their own language, sets of words and phrases that have come, by custom and usage, to have very specific and definite meanings. These are often not obvious to naive readers seeing them as simple text. It often took me quite some time and, on occasion, reference to the authors, to discover the meaning of words and phrases in the context of a specific area of learning. The first part of learning any subject is to learn its argot. The MIT material assumes this knowledge.

Jessie's email pointed out the obvious. Can we reasonably believe that everyone can learn from the same materials MIT students use? Luc, who had to repeatedly answer those how-to-use-material questions online, had his take on this issue. One time we had a discussion about submitting a conference proposal. Luc sent me a PowerPoint file he made, outlining his vision of OOPS' next steps. In one of the slides, Luc put "make OCW useful." In our Skype conversation that followed, Luc told me,

This is a wide spread problem: everyone, including CORE and MIT, is facing this problem. OOPS continued to be questioned – how to use these materials. These materials, as they stand, need to be further digested and interpreted. The materials are hard to make useful for the kind of self learning process we envision for the Chinese population. Chinese people think it is hard to learn anything without a teacher. Personally I think as long as I have class PowerPoint files and handouts, the new information is great enough. But not everyone could think like this. What sets OOPS aside from other OCW organizations is that we are a pure user organization; we do not produce any OCW materials. Therefore it is even more important for us to address the usability issue.

In Luc's view, compared to institutions such as MIT, OOPS did not have to deal with getting buy-ins from faculty members, creating materials, going through copyright clearance and many other steps to put content online. OOPS took what was already

available and made them useful in the local setting by translating them. In this sense, the usefulness of materials became even more important. Luc continued:

This is a world-wide problem for all OCW initiatives. Materials are not adaptable. OOPS could start addressing this issue since we are all about self learners. We don't have to deal with material acquisition. Starting from the last newsletter, I began to write this bi-weekly column for this newspaper. Each time I will give a brief introduction to a course in Sloan School of Management. I will tell the readers how and what we could expect to learn from each course. I hope we could start making materials more useful.

Luc was trying to make those materials more meaningful to the Chinese population. He started a column for a Taiwan newspaper where he introduced one course in each issue. In OOPS' monthly newsletter, Luc also tried to invite volunteers to share our interpretation or learning of certain courses. However, I continued to ponder if there existed any other way to cater to the learning style of the Chinese population? I asked Arnold how he sees Chinese learners could benefit from this open knowledge.

Arnold: I think the best way to learn is from video lecture. It is more close to having a class lecture. But how effective it is? I think not much. In real class, I can ask questions. What happens when I have a question? The most I can do is to re-listen to the video. But if my question persists, I have to ask teachers here [in China/university]. For a teacher without too much experience, they may not be able to explain a concept using different approaches.

Grace: Then the whole OCW movement is useless?

Arnold: There are two useful meanings. For one, someone like me who knows something about this subject and wants to know the new developments overseas can look up each word in the dictionary. I can go to find related Chinese books to get some fundamental understanding. Then I can study those materials.

The second useful way is for pioneering purposes. For instance, IBM built the deep blue to challenge world chess masters. The

computer was not successful but it created a new step. That had significant meaning.

Grace: It has become increasingly obvious at the OOPS forum that many people ask how to use the materials ...

Arnold: Yes, and there are several long threads talking about that, too. Now we have more users, so there is more questioning.

Grace: Is there a solution?

Arnold: I am pessimistic. For example, in one of the lectures I translated, it said SSN. I translated word by word, but I had to have a note explaining that the acronym refers to something similar to our identification card. But what happens if Taiwan doesn't have identification cards but driver license cards instead? There are cultural differences. This is very difficult.

I was disappointed that Arnold was pessimistic as I looked to Arnold for creative solutions to this long-standing issue that became increasingly apparent through the online postings. This issue evidently had troubled the OOPS community as the members continued to wrestle with inventive solutions. To check that Arnold and I were seeing the same issue, I shared with him that I had seen too many postings complaining that they cannot “find” the materials. I asked Arnold what it was that those users cannot find. From my own observation, I believed this “cannot-find” phenomenon was just a reflection of the fact that many OCW courses contained only the skeleton – the syllabus, the list of readings and the list of homework assignments. I wanted to see if Arnold and I were on the same ground.

Grace: I have been curious: when they say they cannot find the materials, what is it that they cannot find?

Arnold: I think they found the materials, but they don't know how to go about using them. You click around and finally locate class notes but once opened, they are only outlines, not really professors' lectures. So users get confused. Where is it? Maybe they are expecting, like our TV degree program, a teacher giving lectures. Some might wonder: if class A has a video



lecture, why doesn't this class? So they feel they cannot find the materials. Actually they have found what exists but just the way of learning is different.

Grace: If a self learner in China was given a material similar to that found in MIT OCW, what do you think would be their ability to self learn?

Arnold: For my generation, it would be difficult but we could make it. For my own students, entirely impossible.

Grace: Why?

Arnold: They seem to lose the passion for seeking new knowledge. Secondly, what can new knowledge bring to them? They tend to be lazy and lack incentive.

Grace: So maybe students still prefer teacher-centered lectures?

Arnold: Yes, we call it duck-feeding teaching.

Grace: Students don't necessarily like this kind of teaching, do they?

Arnold: They may not, but it is convenient. I feed them, so all they need to do is open their mouths. This may not be too motivational but it is comfortable. There is a chance that maybe I am biased, judging by the students around me. Even though I told them what is available, where to find it, and that they should take a look, so far as I know, no one has done any investigation.

It was obvious to me from the beginning that learning from Powerpoint would be difficult. I later became aware that the skeleton courses also posed as a challenge for the Chinese learners committed to self study. If many of the OCW materials assume MIT-caliber knowledge, as Jessie had rightfully pointed out, then for the rest of the world, how can we benefit from it? Is it possible, however, that we just do not know how to make use of what was made available?

### *East-West Difference*

Three months later, my conversation with Doris also came to the topic of this "cannot find" phenomenon. We both agreed that there had been too many postings asking

about where to find the materials. This issue needed serious attention. Like Arnold, Doris also attributed this phenomenon to the east-west difference.

... This is the way American professors teach. Use problems to provoke student thinking instead of spoon-fed answers. Maybe many of us are used to be given detailed instructions. All we need to do is to follow, step by step. This approach will only limit students' critical thinking skills. Many postings ask how they can self study without access to the textbooks. Well, when I studied at the US, even though we had a textbook, it was students' responsibility to read the material outside of class. The professor will not go through the textbook page by page and explain each passage. My professor talked about the content that was partially based on the textbook. If you did not read it prior to discussion, you might be lost. Our study habit is different: "Now turn to page x, and this word means Y" This is a very spoon-fed education. Someone else also posted that the eastern and western education has many fundamental differences. Western education doesn't just give you all the lecture notes and require students to do nothing but read them. That is not the case.

I remember Doris and I also talked about the thin-course phenomenon, meaning that many OCW courses had only the skeletons. I asked how learners could learn, and earlier Doris suggested that it would be difficult to self learn. At the time, Doris even went as far as saying that translating these courses might be a waste of our precious human resources. Did Doris still think so?

... many courses just have a class schedule with readings. Those courses give you a big idea of which chapters from which book could be incorporated into this course in what sequence. If you already have some basic understanding of the subject and therefore can learn independently, maybe courses like this would be useful. From the thinking of a traditional [Chinese] learner, however, they might think there is no use for this information.

Is it really a vast learning style difference between the east and the west that has caused this "cannot find" phenomenon? As a practicing teacher, Arnold shared with me early on many of the different classroom practice he saw.

Arnold: There were intangible rewards for me. I teach marketing, and one thing we teach is pricing, how to decide it. The way it is taught here might be more serious and at times boring. However, in the course I translated, the professor used the example of picking a date and rating each person based on his or her looks, personality and whether the English accent exemplified the concept of conjoint analysis in pricing. In China, in the old times, even now, teachers generally won't use this kind of example in a classroom. However, I think the students might be able to comprehend the concept quicker this way. Another example I remember is that the professor during class, asked students to play mock auction with him by placing bets. In my school, during class, talking about betting money and gambling is certainly prohibited. But the western way of teaching is both more creative and practical – making connections to real life.

Grace: So have you applied these examples in your own teaching?

Arnold: I have tried but not so extreme. For the example of the dates, I might use the same concept but employ a different example. For example, buying a dog, you might like a dog with long hair dog, etc. I would not use the example of dating.

Grace: Why not?

Arnold: I think we are a little stricter as to what could be allowed to go on in a classroom. For example, there is a well-known marketing concept called “political power” that addressed the political strategies used to enter into a particular market. In China, we used to not even talk about it because “political power” was been regarded as a backdoor, unethical strategy that did not fit the mainstream practice. Students usually have a hard time understanding its concept. But in the west, this concept has been researched as a scientific theory. The bigger the corporation, the more they utilized it. In this “political power” example, the west has accepted it as a scientific strategy. But in China, maybe due to the cultural difference, maybe due to the ideological difference, it is not discussed. To me, this is where we could improve.

### Summary

In this chapter, I recounted the OOPS' development stories as the community grew and expanded. I navigated the three-dimensional narrative space among my

participants, through different time spans, and went back and forth between China-Taiwan, CORE-OOPS, and insider-outsider. These major themes formed the basis of the chapter structure. In the telling and re-telling of those stories, several additional themes emerged. Through the tensions that surfaced during OOPS' development, I began to see the forming of individual knowledge communities with and among my participants. I began to realize that my participants also claimed their narrative authority in individual ways. For the first time, I started to ponder the notion of "experience asymmetry" as a natural divide between an insider and an outsider. I attempted to link experience asymmetry to narrative authority as the potential cause of arriving at a different "knowing". During this time, I also started to realize the many external forces that influenced and shaped OOPS. Many of the frictions demanded members' attention. Even though nobody seemed to be able to offer a conclusive "answer" to any of the on-going tensions, OOPS went on as a community and prevailed.

## CHAPTER SEVEN: LUC'S PERSPECTIVES

As the founder and leader of OOPS, what was Luc's position on all the issues raised thus far? Early in our interaction, I realized that Luc was too busy to spend a significant amount of personal time with me. In our first Skype session, he sent me a PowerPoint file and went over the presentation with me. I thought that occurred because we did not know each other, and using PowerPoint as a guide for conversation was not a bad idea. The second time we Skyped, he again sent me a PowerPoint file. Luc again went over the file with me, as a way to frame our conversation. By then, I had started to think that Luc's business-like manner was exactly how he wanted the research process to proceed. After the IM message where he told me explicitly that I was just one of many volunteers that he had to take care of, I decided that the best way to get in contact with Luc was through "business." I tried to leave him alone as a research participant but would request his help and attention when it was time for, say, a conference proposal. He had always been very cooperative when I approached him this way. I have woven many of his perspectives throughout the narratives introduced thus far. However, here I would like to recount two series of conversations we had to highlight some of his views in particular. Luc held and expressed much personal knowledge about OOPS that only the leader would know, and in this chapter, I chose to present some of Luc's perspectives separate from other participants' stories to highlight his unique view.

In December 2004, I contacted Luc about a conference that would be held in Taiwan and asked if he would be interested in submitting a proposal. He agreed. I contacted him again in January 2005 to solicit his comments in preparing for writing the proposal. We decided to focus on introducing our workflow in that proposal. I caught Luc

online and I instant messaged him. I knew that a number of the technology volunteers were working on a new system plan to mitigate some of the workflow challenges, and several of these bore a resemblance to certain issues presented in my narratives. I opened our chat by inquiring about any existing system document.

1/24/2005	9:53:20 AM	Grace	Do you have any existing document from the technology task force that i can use?
1/24/2005	9:54:18 AM	Luc	Yea
1/24/2005	9:54:34 AM	Luc	I have a new PowerPoint file
1/24/2005	9:54:37 AM	Luc	Very complicated
1/24/2005	9:54:49 AM	Grace	Can it be easily understood?
1/24/2005	9:55:00 AM		Luc sends 000-03-001-01-翻譯流程.ppt
1/24/2005	9:55:17 AM	Grace	Who is the intended audience?
1/24/2005	9:55:20 AM		You have successfully received C:\Documents and Settings\glin\My Documents\My Received Files\000-03-001-01-翻譯流程.ppt from Luc.
1/24/2005	9:55:40 AM	Luc	Technical volunteers, for internal use
1/24/2005	9:56:23 AM	Grace	hmm...is it correct? i assume it is a work in progress?
1/24/2005	9:57:38 AM	Luc	Basically correct
1/24/2005	9:59:01 AM	Luc	This is the ideal future
1/24/2005	9:59:40 AM	Grace	Future? how soon is the future? :)
1/24/2005	9:59:59 AM	Luc	The end of this year the soonest.
1/24/2005	10:00:06 AM	Grace	You mean 2005?
1/24/2005	10:01:10 AM	Grace	Do you have like a timetable of intermediate steps in between? what are you guys working on next and the one after that... etc?
1/24/2005	10:05:36 AM	Luc	Cannot require volunteers to meet deadlines
1/24/2005	10:05:49 AM	Grace	True.
1/24/2005	10:18:00 AM	Luc	Time for bed
1/24/2005	10:18:08 AM	Grace	Good night.

The file Luc sent me was quite complicated. It was the first organized document I had ever seen that tried to plan for a more automated workflow from adoption, submission, and volunteer management. In this short chat, I could see that Luc was struggling with the management issues associated with a volunteer-based project. How can you hold volunteers accountable? This was exactly the point Arnold expressed

repeatedly. In Arnold's view, accountability stood as one of the weaknesses of OOPS. I wanted to probe that issue further with Luc. After all, Luc was the only person who had been obliged to deal with the management side of the project. Due to the time difference between Taipei and Houston, however, Luc quickly indicated that he needed to get offline. I was somehow disappointed that we could not continue our conversation. I never knew about Luc's schedule: when he goes to bed or when he has a scheduled meeting. Nevertheless, I understood. We picked up the conversation several hours later after Luc had a good night's sleep and when I again caught him online. I started out by asking him about this "ideal" technical system. As much as I preferred to solicit his viewpoint by giving him the floor, I learned early on that IM was meant to be short and to the point. With this limitation in mind, I usually asked pointed questions. Luc, in turn, had always given me very short, direct answers.

1/24/2005	9:16:52 PM	Grace	In your opinion, how is this ideal process different from any other similar publishing process?
1/24/2005	9:18:15 PM	Luc	We rely more on the volunteers
1/24/2005	9:19:04 PM	Grace	What are the disadvantages of a volunteer-based project like this?
1/24/2005	9:19:40 PM	Luc	Like current OOPS?
1/24/2005	9:20:01 PM	Grace	Yes, what are the challenges you are facing by using only volunteers?
1/24/2005	9:20:21 PM	Luc	Non predictable environment.....
1/24/2005	9:21:04 PM	Grace	Yet the advantages are....
1/24/2005	9:21:36 PM	Luc	Highly flexible...:D
1/24/2005	9:21:52 PM	Grace	ha ha, very funny. What do you mean by that? flexible?
1/24/2005	9:23:28 PM	Luc	We can do anything when we have everything, we can also do nothing when we have nothing...:Q

Had I been talking with Luc face to face, at this point, I would have asked him to elaborate. I knew Luc had publicly expressed in the online forum that he preferred OOPS' loose structure. It was clear that Luc saw the limitations, the unpredictability, the

chaos and the unknown. It was also clear that Luc liked the possibilities or potential and the expandability. I could probe further here. However, I decided not to. I was walking a thin line between getting “something” by carrying out a focused IM chat, or running the risk of getting nowhere by engaging in a prolonged tell-me-what-you-mean conversation. Since the purpose of the IM chat was to get some materials for proposal writing, I quickly zoomed in for what I wanted.

1/24/2005	9:24:51 PM	Grace	Oh, help me out here. I am trying to write that paper for the conference. What are the three most important things you want people to know about OOPS?
1/24/2005	9:25:21 PM	Luc	Whole opensource model
1/24/2005	9:25:30 PM	Luc	Donate expertise, not money
1/24/2005	9:25:49 PM	Luc	Grassroots social movement.
1/24/2005	9:26:14 PM	Grace	What is a grassroots social movement."?
1/24/2005	9:28:15 PM	Luc	The project is not owned by any single institute
1/24/2005	9:28:20 PM	Luc	But by the whole society
1/24/2005	9:28:36 PM	Grace	Isn't that the first one - "Whole opensource model" ?
1/24/2005	9:30:08 PM	Luc	Oh, the first one is about program....:Q I did not think about the "spirit"....:Q
1/24/2005	9:30:46 PM	Grace	Then give me another one - what do you want people to know about OOPS?
1/24/2005	9:31:41 PM	Luc	Hmmmmmm....
1/24/2005	9:31:45 PM	Luc	What do you think?
1/24/2005	9:32:15 PM	Grace	I asked you the question
1/24/2005	9:32:41 PM	Luc	What is your perspective
1/24/2005	9:34:07 PM	Grace	From my perspective, OOPS also challenges the notion of "knowledge" - who "owns" it, who the producers are and who are the consumers, etc
1/24/2005	9:34:20 PM	Luc	That is kind of difficult to convey!
1/24/2005	9:35:34 PM	Grace	Leave that to me then. :)
1/24/2005	9:35:44 PM	Grace	(I have to think about it)

As mentioned, Luc saw OOPS as a grassroots social movement, something not owned by him or any individual but rather by society. I recalled that earlier Luc had said on the forum that he would have to share OOPS with the people whom he hated because



OOPS was not only about being open and sharing but because OOPS was already a shared property that belonged to all of mankind. What Luc said here reflected his consistent belief about the project. Even though I continued to ponder about the notion of a social movement, I needed to move on.

1/24/2005	9:36:21 PM	Grace	Now, another question. According to your experience, what are the top three things that most interested and surprised people about OOPS?
1/24/2005	9:36:38 PM	Luc	There are so many volunteers
1/24/2005	9:36:41 PM	Luc	They do not want money
1/24/2005	9:36:46 PM	Luc	Volunteers have high educational levels
1/24/2005	9:39:08 PM	Grace	The # of volunteers, this one surprises me the most. Why do you think there are so many volunteers?
1/24/2005	9:39:18 PM	Luc	How am I supposed to know?
1/24/2005	9:39:21 PM	Luc	Because we do not screen for qualifications?
1/24/2005	9:42:18 PM	Grace	Interesting answer. Another question. In regard to the technical aspect of OOPS. In addition to unpredictable schedules, what are the top three challenges you are facing?
1/24/2005	9:42:58 PM	Luc	Three more?
1/24/2005	9:43:05 PM	Grace	:D
1/24/2005	9:43:09 PM	Luc	Need great coordination among various resources
1/24/2005	9:43:13 PM	Grace	ok, that is one.
1/24/2005	9:43:58 PM	Grace	Resource means people?
1/24/2005	9:44:41 PM	Luc	Mainly people
1/24/2005	9:44:52 PM	Luc	In addition, how to communicate with potential partners
1/24/2005	9:46:07 PM	Grace	So, internally, how to coordinate the collaboration among volunteers. and externally how to seek partners.
1/24/2005	9:47:07 PM	Luc	Yes
1/24/2005	9:47:18 PM	Luc	The next is to how to open up new OCW materials
1/24/2005	9:48:21 PM	Grace	Why is that a problem?
1/24/2005	9:48:36 PM	Luc	MIT is not everything
1/24/2005	9:48:58 PM	Luc	There's still more to come, and we have to present our own open content...:D
1/24/2005	10:05:40 PM	Grace	Have you talked to professors? anyone willing or interested?
1/24/2005	10:07:51 PM	Luc	Ah-?
1/24/2005	10:08:02 PM	Luc	I will never waste my time on the professors
1/24/2005	10:08:06 PM	Luc	Taiwan's professors like to make money
1/24/2005	10:08:10 PM	Luc	And are hard to deal with
1/24/2005	10:09:49 PM	Grace	Ok, that was not my original question. When I said "technical" I

			meant computer stuff - the top three technical challenges you are facing...?
1/24/2005	10:10:05 PM	Luc	A complete management system
1/24/2005	10:10:17 PM	Luc	Efficient and beautiful user interface
1/24/2005	10:10:29 PM	Luc	Sustained long-term system administrator
1/24/2005	10:14:21 PM	Luc	I need to run ... a meeting..:D
1/24/2005	10:14:28 PM	Grace	Ok, catch you later,

This hour-long IM chat produced some interesting points for me to ponder. I was not completely happy with the way we carried out our conversation. I wish I could have asked more follow-up questions. I was also not completely happy that our conversation had to be interrupted again before I could ask all the questions I had in mind. I felt the chat was just about to come to some interesting turns. But I was happy with what I could accomplish. Luc once told me in our Skype session that he was also surprised by volunteers' overwhelming enthusiasm. When he first started the project, he did not know if anyone would volunteer. This time, Luc suspected that volunteers perhaps flocked in due to OOPS' open-door policy. When I asked the same question several months later, Luc answered in a more confirmative tone, "because OOPS is inspirational." Maybe it was both, I wondered. In this IM chat, I came to know that Luc was very ambitious in thinking about expanding OOPS by seeking other OCW materials. He later told me that he had had many conversations with people and one of the feedbacks he received was about the lack of K-12 materials. The current OCW materials were aimed for college-level learners while the even more basic education started earlier than college. Earlier I presented Arnold's narratives in which he shared concern about OOPS' over expansion. Doris shared the same concern. Luc seemed to think otherwise when he said, "MIT is not everything." Has OOPS over-extended itself? I wondered. The next day, I caught Luc online again, so I IMed him once more to continue our conversation.

1/25/2005	9:13:53 AM	Grace	Continue our conversation.... OOPS is supposed to be a prototype, hopefully for others wanting to start similar projects, right? So what are the top three things you want people to learn from your OOPS experience so far?
1/25/2005	9:14:25 AM	Luc	If there's anything that money cannot do, do it with what money cannot buy
1/25/2005	9:15:10 AM	Grace	Good, that is one.....
1/25/2005	9:16:30 AM	Luc	Do things from bottom up
1/25/2005	9:17:03 AM	Luc	Not top down
1/25/2005	9:17:26 AM	Grace	Understand, and the third one?
1/25/2005	9:26:25 AM	Luc	Do the most with the least amount of resources
1/25/2005	9:27:34 AM	Grace	Good! let me ask from a different angle. If someone wanted to start, say, OOPS in Korea, what three pieces of advice would you give to that person?
1/25/2005	9:27:57 AM	Luc	1. Just do it
1/25/2005	9:28:03 AM	Luc	The ideal environment will never come
1/25/2005	9:28:16 AM	Luc	2. Do it today
1/25/2005	9:28:28 AM	Luc	3. Knowledge is the best reward
1/25/2005	9:28:45 AM	Grace	Please elaborate on "Do it today"
1/25/2005	9:29:36 AM	Luc	ASAP...:D
1/25/2005	9:29:45 AM	Luc	The key is mobility
1/25/2005	9:29:47 AM	Luc	Have to make it happen fast
1/25/2005	9:30:15 AM	Grace	If not quick enough, what will happen?
1/25/2005	9:35:24 AM	Luc	Nothing
1/25/2005	9:35:36 AM	Luc	"Nothing" will happen...:D
1/25/2005	9:36:23 AM	Grace	Are you saying if he has the idea, he should go ahead and do it (#1) today (#2) instead of waiting for ideal conditions to happen (#1) before taking actions?
1/25/2005	9:36:42 AM	Luc	Yup
1/25/2005	9:36:53 AM	Luc	Because he'll wait forever....
1/25/2005	9:37:11 AM	Grace	Got it!. "Knowledge is the best reward" - is this your advice on marketing strategy (how to recruit volunteers) or strategy to convince a person to do something this crazy?
1/25/2005	9:38:16 AM	Luc	It's for the volunteer and the GUY....
1/25/2005	9:39:38 AM	Grace	Got it! What are the worst and best decisions you have made during this project?
1/25/2005	9:39:49 AM	Luc	No, bed time
1/25/2005	9:39:54 AM	Luc	Continue tomorrow.
1/25/2005	9:39:58 AM	Grace	Ok, bye.

During the wintertime, Taiwan was 14 hours ahead of Houston. Nine-thirty in the morning in Houston would be eleven-thirty at night in Taiwan. It certainly was bedtime for anyone. As much as I wanted to continue our already-interrupted conversation, I had to wait for a couple more hours. Going back and re-reading our IM chat, I was not surprised at what Luc had told me: don't wait for the perfect conditions; just do it. Like Doris said, Luc had ambition. What was Luc's reward? Here he offered yet another piece to the puzzle when he said "it's for the volunteer and the GUY." I suspect he referred to "the GUY" as someone like him, the leader who initiated the project. Just like many volunteers had expressed, Luc had also learned much of what he now knew about this innovative way of facilitating learning in the process of organizing and conducting the volunteer program. One time in our Skype session, Luc even went further. "I have several hundred pairs of eyes looking at the world for me, how much fun is this? Life is supposed to be like this!" Luc, in a rare sentimental voice, told me that he was referring to the eyes of volunteers from all over the world. I suppose that would be an enjoyable experience, "hearing" and "seeing" the world through the eyes of the volunteers! I caught up with Luc online again a day later.

1/26/2005	8:07:17 AM	Grace	So ur going to London? Very cool.
1/26/2005	8:08:06 AM	Luc	Yup
1/26/2005	8:08:09 AM	Luc	For first time
1/26/2005	8:09:36 AM	Grace	Ok, that was the warm up. Now, my question continuing from last time... Can you recall a situation where you had to make a decision but were uncertain about what to do?
1/26/2005	8:10:10 AM	Luc	Please be more specific....
1/26/2005	8:11:09 AM	Grace	Have you run into situations when you have to make a decision (of course we are talking about OOPS here) but were unsure if the decision is good or how it will turn out.
1/26/2005	8:12:52 AM	Luc	Remember I went to Beijing and visited CORE?
1/26/2005	8:12:57 AM	Grace	Yes.

1/26/2005	8:13:55 AM	Luc	Initially I was totally willing to cooperate, even if they see us as a regional project or a project under them. I was all willing.
1/26/2005	8:14:01 AM	Luc	All I hoped was to be able to help with knowledge sharing
1/26/2005	8:14:08 AM	Luc	I was not sure if I should do it
1/26/2005	8:14:17 AM	Luc	Later it proved that they were unwilling...:D

Luc unexpectedly brought up the very tricky CORE-OOPS issue. Not surprisingly, though, he was consistent with what he had said online: they were not cooperative. Luc continued to maintain the same position both online and with me. In an even stronger tone, Luc, on two other occasions, had expressed to me that CORE had “an attitude.” I had to admit that I was largely influenced by Arnold regarding this issue. My conversation with Arnold made me more cautious and more neutral when discussing CORE-OOPS issues. However, I can somehow imagine Luc’s frustration. If he did try to initiate a collaboration and if he indeed was rejected one way or another, considering Luc’s personality, it was not hard to understand why he did not seem to let his guard down every time people inquired about this issue. I cannot help but wonder if and how Luc’s personality and personal view might have influenced the past and future relationship between CORE and OOPS. Luc continued with our IM session.

1/26/2005	8:17:51 AM	Luc	Also at the beginning, I thought about one or two minutes
1/26/2005	8:17:56 AM	Luc	Should we set up volunteer qualifications
1/26/2005	8:18:00 AM	Luc	But later I decided not to
1/26/2005	8:18:09 AM	Grace	How did you make that decision?
1/26/2005	8:20:49 AM	Luc	I felt we are talking about knowledge sharing and if we set limitations
1/26/2005	8:20:52 AM	Luc	That would be ridiculous
1/26/2005	8:21:03 AM	Luc	In addition, we do not have the qualifications to decide who qualifies
1/26/2005	8:21:39 AM	Grace	Very good and an important point. So now looking back, do you wish you had done it differently or are you happy about that decision?
1/26/2005	8:22:25 AM	Luc	I don’t think I had great foresight

1/26/2005	8:22:33 AM	Luc	It was just that from the beginning, I was aware of our weakness
1/26/2005	8:22:36 AM	Luc	If I were the President of National Taiwan University
1/26/2005	8:22:46 AM	Luc	We could certainly decide who qualifies because we would have the resources to do so
1/26/2005	8:22:48 AM	Luc	But I am not [the President of National Taiwan University]
1/26/2005	8:22:52 AM	Luc	So we cannot do it
1/26/2005	8:23:54 AM	Grace	Interesting. you emphasized “have the resources”--are you saying that National Taiwan University’s President will have access to *people in authority and credibility* who can make that kind of decision?
1/26/2005	8:24:54 AM	Luc	Yup
1/26/2005	8:25:02 AM	Luc	but I did not say he “has the qualifications”...:D
1/26/2005	8:25:10 AM	Luc	because I think even he has no qualifications [to make this kind of decision]...:D
1/26/2005	8:26:17 AM	Grace	All right, now we are getting into some interesting stuff. You don't think they qualify. Are you hinting that, on the other hand, *others* might perceive them as having the qualifications to do so?
1/26/2005	8:26:51 AM	Luc	Yup °

Once again, Luc revealed one of his consistent beliefs about OOPS’ open-door policy. It was clear to me that Luc was fully aware from the beginning that people might criticize OOPS’ quality, but he chose to do what OOPS did. However, I came to realize here that Luc did not claim to have some powerful sixth sense in seeing the future. On the contrary, he did what he could based on what was available to him at any particular time. Interestingly, Luc also challenged the established authority as he believed that they too did not qualify as “experts.” We could peek into many of Luc’s attitudes, values and beliefs through these relatively short yet telling messages. Clearly, Luc’s narrative authority was not constrained by the established authority. When the IM session continued, Luc revealed more of his true nature.

1/26/2005	8:27:05 AM	Luc	Our concept is we “will never give up on any volunteers” unless you first give yourself up
1/26/2005	8:27:19 AM	Luc	Remember you are helping a volunteer with some editing work?
1/26/2005	8:27:32 AM	Grace	Yes, I am still doing that.

1/26/2005	8:27:53 AM	Luc	I have many translation experiences
1/26/2005	8:27:58 AM	Luc	I can positively tell you
1/26/2005	8:28:07 AM	Luc	That if that volunteer is taking a course about translation
1/26/2005	8:28:10 AM	Luc	She will fail
1/26/2005	8:28:18 AM	Luc	But I will still accept her as a volunteer
			.....
1/26/2005	8:31:00 AM	Luc	If I were working for a for-profit organization and if she were a paid translator
1/26/2005	8:31:08 AM	Luc	I definitely would kick her with my foot and I would reject her work
1/26/2005	8:31:20 AM	Luc	But we are a volunteer-based organization
1/26/2005	8:31:29 AM	Luc	My most fundamental goal is to let every single volunteer gain the rewards that the project offers.

Luc was sharp when it came to expressing his point of view. Luc educated me about his respect for every single volunteer and his emphasis on rewarding them. I continued the IM chat but probed further. Luc had not yet offered me any examples of undesirable consequences OOPS suffered as a result of his bad decision making, a starting question in this IM chat.

1/26/2005	8:33:43 AM	Grace	Now, honestly, have you ever felt you have made a bad (or not so desirable) decision? what was it and what were the consequences?
1/26/2005	8:34:30 AM	Luc	Yea, we have never had a full-time system engineer
1/26/2005	8:34:36 AM	Luc	Now I think this decision was not quite right
1/26/2005	8:34:44 AM	Luc	Evidently our progress has been delayed
1/26/2005	8:35:24 AM	Luc	There are too many tedious tasks, causing us to stand still in our Long-term system planning (for example, we are receiving new files every day, making changes to files)
1/26/2005	8:35:35 AM	Luc	I think I will allocate some money and hire a full-time system engineer
1/26/2005	8:37:18 AM	Grace	Yes, right to the point. This is what I thought too. That appears to be a huge bottleneck for OOPS. Good thinking. I hope you hire someone soon. This is a good one. Do you have another example? Situations where you changed your mind/view/position about something?
1/26/2005	8:40:49 AM	Luc	Rarely
1/26/2005	8:41:03 AM	Grace	That is fine.

I was pleased that Luc was honest enough to admit this obvious pitfall. Recall in an earlier IM chat, Luc shared with me a file that contained a blueprint for a future automatic system. Luc was aware of what was lacking in the overall computer infrastructure and was making an effort to improve it. In my opinion, without a stable full-time person behind such a project, it could be disastrous. Readers could recall Arnold's comment about the lack of a solid foundation as being one of the weakest links. Here, I also sensed Luc's unwavering personality in that he did not think he had changed his perspective in the process of creating and maintaining OOPS. The chat continued.

1/26/2005	8:41:37 AM	Grace	Tell me your opinion on how you could characterize OOPS' relationship with MIT OCW.
1/26/2005	8:43:43 AM	Luc	The only WEIRD hobbit in a group of giant.
1/26/2005	8:44:53 AM	Grace	Uh? Who is the hobbit? MIT? who is the giant?
1/26/2005	8:45:28 AM	Luc	OOPS is the hobbit, all the affiliator and MIT is the giant.
1/26/2005	8:45:54 AM	Grace	Oh, we are weird b/c...?
1/26/2005	8:47:36 AM	Luc	Yup Hobbit...:D
1/26/2005	8:48:25 AM	Grace	We are Hobbit b/c we are "small" and MIT and its partners are the giant b/c they are "big"?
1/26/2005	8:49:20 AM	Luc	Yup, and the second meaning is that, In the LORD OF THE RING, it is the hobbit [who] destroyed the ONE RING...;>
1/26/2005	8:49:55 AM	Grace	ic, it is the "small" ones who accomplish the "big" thing?
1/26/2005	8:51:54 AM	Luc	Big guys have big thing to do, there are some things only small ones can do...:D
1/26/2005	8:52:29 AM	Grace	Interesting. But why do you say we are "small" and they are "big"?
1/26/2005	8:52:56 AM	Grace	At least in the movies, there is the physical size difference....
1/26/2005	8:53:53 AM	Luc	We are a small organization!
1/26/2005	8:54:00 AM	Luc	We have less budget
1/26/2005	8:54:17 AM	Luc	We do not belong to the consortium
1/26/2005	8:54:23 AM	Luc	We have only 2 to 3 full-time employees...:D
1/26/2005	8:56:41 AM	Grace	Budget=money; consortium=credibility/authority/resources; full-time employee=resources. Interesting. Am I right?
1/26/2005	8:56:59 AM	Luc	I guess so



In the message presented above, Luc borrowed the metaphor from *The Lord of the Rings* to position OOPS' relationship to MIT. In the novel, the Hobbits were "little people" who went through hardships, made the "impossible" journey, and accomplished what many other more powerful people cannot achieve: destroy the evil and bring peace to the middle earth. Compared to many OCW organizations such as MIT, OOPS was "small" with less of everything: less money, less credibility, less authority, and less resources. Nevertheless, Luc had his eyes set on the possibilities: what OOPS could accomplish. OOPS had already found its niche as a translation project. Clearly, one volunteer at a time, one course at a time, step by step, OOPS will achieve what many OCW organizations cannot achieve.

1/26/2005	9:04:34 AM	Grace	Hey, how come it does not drive you crazy (it is driving me crazy) to see that almost every other day, someone is asking "cannot find Chinese courses" question????
1/26/2005	9:06:11 AM	Luc	I think this is the problem of communicating through mass media, many details cannot be explained
1/26/2005	9:06:23 AM	Luc	Everyone thinks, okay you have announced the project, everything must be finished !
1/26/2005	9:06:26 AM	Luc	Let's come and use it
1/26/2005	9:07:54 AM	Grace	So it does not drive you crazy b/c you think this is a limitation? Limitation of what? the medium (internet)?
1/26/2005	9:08:10 AM	Luc	Communication and human nature!
1/26/2005	9:08:57 AM	Grace	Communication - limited to?? Why is this a limitation of communication?
1/26/2005	9:12:45 AM	Luc	Because the media will not give you [the space] of several thousand words to explain all the details!
1/26/2005	9:14:48 AM	Grace	oh! You are talking about that kind of communication. Of course that is a limitation. However, wouldn't you agree that if there are *so many* similar questions, it is a clear indication that there is also a design issue (interface design, etc) in question?
1/26/2005	9:17:33 AM	Luc	The faqs have very clear explanations
1/26/2005	9:17:37 AM	Luc	But people continue to ask
1/26/2005	9:17:43 AM	Luc	Evidently this is unavoidable human nature
1/26/2005	9:17:51 AM	Luc	When users are lazy

1/26/2005	9:18:00 AM	Luc	Even if we hang a pancake by their mouth, they will be too lazy to exert themselves enough to eat the cake and therefore starve to death
1/26/2005	9:20:47 AM	Grace	Very interesting. For volunteers, you don't want to give up on any one of them. But for those lazy readers, screw them!?
1/26/2005	9:22:29 AM	Luc	Yup, I can save as many as possible. But I can't save everyone.
1/26/2005	9:23:05 AM	Grace	Good enough. Your bed time is approaching. Good night.
1/26/2005	9:23:39 AM	Luc	Yup...:D

This IM chat lasted for about an hour and half, long enough to make me feel tired afterwards. However, in this chat, Luc offered many insights only a leader could experience. For example, Luc did consider setting volunteer criteria but decided not to. As Luc said, that decision was not necessarily a choice but really a must considering the available resources. I remember Luc also had shared with me that the reason he decided to use volunteers was also out of necessity and not out of his great foresight: where could he find this many translators across such diverse disciplines? Luc, however, did admit the mistake of not having a full-time system engineer. I knew Luc was fully aware of this situation but I was glad he would admit it to me. This goes back to what Arnold had said about a robust system infrastructure. The only thing that was automatic was the course adoption program, which took effect around June 2004, several months after OOPS' inception. Since then, many more static HTML pages have been added. Yet, I have not seen any programs done in regard to improving system efficiency. All these decisions, whether the products of choice or of force, certainly had their impact on the project. The information that I found the most interesting was Luc's interaction with MIT. How Luc interacted with these entities was not completely known to the public. Maybe MIT was "big" and maybe OOPS was "small." However, Luc did not show any sign of fear. The usual upbeat "tone" in his voice never failed. Two months after this chat, our proposal was accepted and we chatted again online to go over some small details about conference

registration. As with any other chat, the conversation digressed into many small, disconnected segments that at one point centered on MIT.

3/24/2005	9:15:47 AM	Luc	These couple of weeks, MTI has been asking me for this and that, left and right
3/24/2005	9:15:50 AM	Luc	Very troubling
3/24/2005	9:15:59 AM	grace	What do they want?
3/24/2005	9:16:05 AM	Luc	We become second-class citizens when we are waiting to sign any sort of memo with them
3/24/2005	9:16:15 AM	Luc	All of a sudden we cannot do many things that presumably others could...Orz....
3/24/2005	9:16:19 AM	grace	Really?
3/24/2005	9:16:23 AM	grace	Like what?
3/24/2005	9:16:37 AM	Luc	For example, some courses have to be reviewed by the course professor before publishing online...
3/24/2005	9:16:41 AM	Luc	(Because he knows Chinese)

I remember Doris told me that the very first class she translated was still not online after several of her later translations had been published. Doris told me the class's professor was of Chinese origin and the professor would like to review it herself. I don't know if Doris' course was what Luc was referring to. However, I do know that this course was still held up at this MIT professor's end. Later I had the chance to ask Luc again about this course. "MIT is giving us a lot of trouble, just as we are no doubt giving them considerable trouble as well," Luc replied with a grin in his face.

In summer 2005, Luc and I again were working on a conference proposal. The theme of the conference was the effectiveness and sustainability of various Open Educational Resource projects, so we decided to focus our presentation on lessons learned from OOPS in terms of effectiveness and sustainability. We decided to present our challenges and methods we had implemented to counter or meet those challenges. After our Skype session, I drafted up the proposal and sent it to Luc for member check.

The three effective challenges were 1) effective utilization of volunteers, 2) effective lateral interactions among volunteers, and 3) effective dissemination of project ideas. The possible solutions were 1) empower leaders and redistribute duties, 2) foster local/regional subgroups, and 3) disseminate through click-of-mouse. The three sustainability challenges were 1) sustaining experienced volunteers, 2) sustaining a robust workflow, and 3) sustaining adequate funding. We also proposed three possible solutions: 1) create a mentoring system, 2) build a relay-based workflow, and 3) foster a knowledge community.

While many of the ideas came from Luc, I contributed my own concepts. For example, according to Luc, OOPS had an overall drop-out rate of approximately 33%. Online postings revealed that many newcomers asked only a few similar questions repeatedly, such as “where do I find those reading materials,” “how do I go about becoming a volunteer,” and “why have I not received adoption confirmation.” The continued influx of newcomers necessitated a robust system that can sustain itself. Luc called the current workflow a relay system because:

... volunteers have two months to finish all HTML-page translations after their initial course adoption. After two months, if a volunteer fails to finish the work, the course is then reopened for a new adoption. This mechanism eliminates laggards, encourages a flow of new volunteers, and facilitates project progression

I never saw OOPS as a relay-based system until Luc pointed this out. Luc went further, indicating that “we are evaluating the possibility of further breaking down the ‘unit of adoption’ into smaller subsections to facilitate even more fluid progression.” Luc wanted an even more modularized approach because “it is just too much for one person to translate the entire course.” “But how about terminology consistency?” I asked.

“Maybe the modularity occurs at level-two, where the PDF files are. All volunteers could base their terminologies on level-one translation,” Luc replied. He seemed always to have a ready answer. I think he probably thought about OOPS day in and day out. I, on the other hand, continued to ponder about the notion of modularity. Does each module codify knowledge? What do volunteers bring to each module and who is responsible for connecting all individual modules into a holistic knowledge piece?

### Summary

In this chapter, I presented two stories, revealing through narration how Luc and I used IM and Skype to collaborate on proposal writings. My interactions with him informed me of many different aspects of the project that were not necessarily seen and shared by the public. In many instances, Luc directly or indirectly expressed his view about many of the issues brought up in the previous chapters. Many times he shared his own unique perspectives. Luc saw and experienced things that many volunteers did not see or experience due to his unique positioning on the OOPS landscape. From my own experience and observation, it seemed likely that asymmetry conceptualization might explain such a division between Luc and the rest of us. Because of such an asymmetrical experience, at times Luc’s narrative authority constrained volunteers’ narrative authority. In addition, the narratives about OOPS would not be complete without unpacking his view as it became increasingly shared with, and known by me.

## CHAPTER EIGHT: SUSTAINABILITY

I cannot predict the future. Neither can Luc or Arnold or Filestorm or Doris or Jessie. Therefore OOPS as an evolving project held its own mystery about what was to come. Being involved in the project since June 2004, I considered myself an old-timer OOPSer. Through my own experience as well as those of my participants, including Luc, OOPS possessive founder, I witnessed the forming of this - for some - impossible undertaking. As the project matured, my participants and I found ourselves adjusting to our changing roles and perspectives as devoted OOPSers. We were constantly challenged by those with different, at times even opposing views. As OOPS continued to develop to face ongoing and new challenges, one last question remained: how did we keep at it? In the narratives that follow, I capture three separate stories lived and told, re-lived and re-told from Filestorm, Arnold and Doris to help illuminate this last puzzle.

### Filestorm: I Cannot be a Lone Hero

Filestorm regrettably did not have much voice in the narrative until near the end of my research. As a student in college, his course load was so heavy that he used the word “crucified” to describe his situation before final exams. I could not bear the thought of adding to his burden for the sake of my own research. About two months prior to his returning to school from summer vacation, our communication began to fade. After he returned to school, our communication came to a complete stop. He continued to pop up on my MSN screen from time to time. As was his usual practice, Filestorm set his online status to “busy.” When a person sets his status to “busy,” a stop sign icon will display next to the person’s name. I never tried to initiate contact. However, I continued to hear information about him through other channels such as OOPS’ gathering reports

and newsletters. Back in September 2004 I voluntarily started a sub-project to transcribe all available OCW video lectures to subtitles. Filestorm was one of the first volunteers to join this sub-project. About a year later, I received an unexpected email from one of Filestorm's classmates. In the email, he introduced himself and informed me of a project that was going on at their school – Shanghai Jiao Tong University. It turned out that when Luc visited Shanghai in August 2005, many of Filestorm's classmates attended. From there, they decided to form a special task force named OOPS-SJTU. This task force would recruit students from Shanghai Jiao Tong University and work in teams to transcribe the video lectures. Filestorm was the mastermind behind this project, and several of his best friends were the “lieutenants” putting their efforts to make this happen.

I was certainly pleasantly surprised by the email and eagerly awaited for the event to unfold. Unfortunately all the email communications between Filestorm's classmates and me can not be included in this narrative due to IRB regulations. Luckily, there were several OOPS newsletter articles that introduced this project. These reports provided me some information though not as much as I might have wished. According to the newsletter, Filestorm was working on transcribing a four-hour video and overworked himself. The overwork, in fact, hospitalized him. That became the turning point. While lying in his hospital bed, Filestorm realized the brutal fact that one person could only accomplish so much: the idea of OOPS-SJTU was born. This article was part of November 2005's newsletter. I read this article then realized I knew about that incident when Filestorm was just released from the hospital. It was July 1, 2005 when Filestorm initiated an IM chat that lasted only about 15 minutes.

7/1/2005	9:18:52 PM	Filestorm	Hi
7/1/2005	9:18:54 PM	Filestorm	I am sick

7/1/2005	9:19:08 PM	grace	What happened?
7/1/2005	9:19:27 PM	Filestorm	Fever
7/1/2005	9:19:32 PM	Filestorm	Tonsil inflammation
			.....
7/1/2005	9:21:21 PM	grace	You better take care of yourself, such as - no computer for two days. :)
7/1/2005	9:21:21 PM	Filestorm	Will rest after taking care of some accumulated tasks
			.....
7/1/2005	9:24:03 PM	Filestorm	Several days ago I was helping Luc transcribing that dam four-hour video
7/1/2005	9:24:06 PM	Filestorm	so much work
7/1/2005	9:24:11 PM	Filestorm	I think that was the cause of my being sick :S
			.....
7/1/2005	9:24:33 PM	grace	I can see why Luc likes you. :)
7/1/2005	9:24:55 PM	Filestorm	Ya, more diligent than the ants
7/1/2005	9:24:57 PM	Filestorm	Don't want money
7/1/2005	9:25:01 PM	Filestorm	Of course he likes me .....
7/1/2005	9:25:05 PM	Filestorm	I'd like myself too [if I were him]
7/1/2005	9:25:06 PM	grace	I don't understand why there had to be such a rush about the video
			.....
7/1/2005	9:25:39 PM	Filestorm	Luc wanted to show off OOPS to [the person in the video]
7/1/2005	9:25:42 PM	Filestorm	I think that was what Luc meant
			.....
7/1/2005	9:26:17 PM	Filestorm	So I felt obligated to help

Filestorm was Filestorm, always working himself to the extreme. At least that was the impression he gave me. I remember thinking, “Why?” Why did Filestorm work so hard for this voluntary effort? Even though he had told me repeatedly that what OOPS stood for matched what he believed in, I cannot help wondering if there was anything more. At the time of the IM, of course, I had no idea that Filestorm was contemplating a much bigger plan: getting others involved. As it turned out, there was something “more.” Some of the answers could be found in this newsletter, which also included a brief



interview with Filestorm. One of the questions asked was how Filestorm was able to identify with OOPS.

Spiritually speaking, OOPS' goal is to illuminate what is dark, raise what is low. This is also an enterprise I have been pursuing. Practically speaking, I believe education should be something every responsible person should be concerned about. Of course that includes me. Since I can identify with OOPS [at least at two levels,] therefore I joined.

The newsletter also asked Filestorm why he decided to join the transcription project. Filestorm revealed that he initially worked on translation. In the process, he realized the difficulty of locating matching Chinese translations, especially for those key terms. This situation bothered him so much that he decided to transcribe video lectures instead. He confessed:

In part, I felt my English listening ability was quit adequate. In part, I just love Linear Algebra. In part, I worship the old man [the professor.] Therefore I started on the transcription of Linear Algebra. At the beginning I was very crazy. Everyday, I was like going to work. For eight hours, I sat and listened. Ten lectures were finished.

I remember his craziness very well. In lecture four, he ran into some problems and posted a call for help online with the thread title "Help! Been struggling for over a week. Hope enthusiastic friends would help." In the message, Filestorm wrote:

I am participating in the transcription sub-project and am currently listening to video #4 of Linear Algebra. This class' recording was not very good; in the majority of other videos that I have transcribed, I have had at the most 3 to 5 places where I cannot understand [what the professor was saying.] In this video, I have countless places where I cannot understand; many of which are key terms. I was compelled to listen to one garbled passage over 100 times and to discuss it with four other friends before I eventually figured out the content. Another mysterious phrase appears three times but I just cannot catch it. I looked through all the Linear Algebra books this afternoon but failed to find any phrases with similar pronunciations. Actually this class' content was not difficult and did not

have too many special terminologies. The problem is that too much noise ruins the sound quality. I have been trying very hard to continue listening to it. I have finished about the first 40 minutes and have put what I have done here <http://oops.editme.com/algebra-4>. I hope someone can help me. I am thinking that I need to collaborate with someone else in transcribing this lecture. . My ability is still green.....

Luc kindly replied quickly and offered encouragement, “according to my past experience, at times you could listen to a lecture for over 100 times but you just cannot get it. Someone else listens to it and gets it right away.....:Q” When I saw the posting, I of course felt obligated to help--not only because I initiated this sub-project, but because I was just impressed by Filestorm’s relentless effort. If he would listen to one phrase over 100 times just to get it, I certainly should see what I could do to help. Another reason I wanted to listen to this video was to take a look at this “old man,” as Filestorm sometimes called the professor. If Filestorm worshiped him, at least I could take a look at what this class was about. I spent about an hour listening to the first 40 minutes of this lecture and helped proofread the transcriptions. Filestorm did a wonderful job of capturing what the professor said, except for a few places. I listened to it and helped correct as much as I could. I felt the transcription was very good. Filestorm must be a perfectionist to not be happy with what he had done. This incident, which happened in early February 2005, provided a glimpse of Filestorm’s strong work ethic. In the November newsletter, Filestorm was asked how he transformed from typing up transcriptions to initiating the OOPS-SJTU project. Filestorm answered,

There is only so much a person can do. I cannot be a lone hero. Even if I finished 10 videos, or even 20 videos, what I have done is just a drop in an empty bucket, compared to the goal of “illuminating what is dark, raising what is low.” As I became more involved, this thought grew stronger. I

felt I could not continue by myself.

Filestorm attributed his “turning point” to his hospitalization in July. While in the hospital bed, he thought to himself,

Even if I work myself to death, I am not going to go too far in the enterprise of “educating the people.” There must be a change. I should not use my power to accomplish this enterprise. Instead, I believe I should use my power to discipline a bigger power to accomplish the goal.... This is what I am trying to do.

The “bigger power” was the OOPS-SJTU team, the most “well-organized” team in OOPS. According to the newsletter, in Shanghai Jiao Tong University alone, there were over 70 student volunteers who dedicated their effort to nothing but creating transcriptions. As the project coordinator, I had seen the impressive performance of this team. I learned from this story that Filestorm had transformed from a “lone hero” to “discipline a larger power.” “OOPS gives me a sense of power: illuminate what is dark, raise what is low,” Filestorm concluded in the interview. I did not know that was “dark” and “low” in Filestorm’s mind. However, I sensed what Filestorm moved beyond his “call of duty.” I sensed that Filestorm was seeing a much bigger picture. I cannot say I know what that picture was. I can say, however, I was humbled by Filestorm’s “power.”

#### Arnold: This is What Confused Me

An online thread, posted in the end of August 2005, started out by suggesting that OOPS needed an automated system for translation progress check up and reporting. I commented that I believed a bigger problem was the editor shortage, which slowed down the overall progress. Even Doris joined the conversation, “I’m very curious about how OOPS recruits editors and why some of them quit.” In a rather vague response, Luc

indicated that he did not know why people with editor quality do not volunteer. Arnold responded next, “Because [editors carry] bigger responsibility.” Then Arnold continued to ask, “Luc, Have you heard from Mr. Wei? It has been more than a year and yet 15.812 is still partially edited. Some of the [already edited] PDF files are still not yet online.” In the next response, Luc wrote, “I have been trying to contact Mr. Wei in the past several months ... but all attempts have failed. All the PDF files he has turned in are incomplete, causing a cascading delay... We will have to find another editor for this course.”

Throughout our interviews, I knew Arnold had been unhappy with the process of his translation. Always ready to recite the exact date of each event, Arnold told me that he adopted this course on the night of May 7, 2004 and finished the translation and submitted it to Luc on July 3, 2004. When we began our interview in late April 2005, Arnold told me that his course was “near its publication/online.” When we Skyped, we discussed more about his course and my course. Like Arnold, I was not very pleased with the process of my translation either. I adopted the course in mid June 2004 and submitted the translation in early September. It was not until December that Jessie volunteered to edit my course, and the final edited content was submitted at the end of 2004. I always puzzled over the slowness of this process. To make matters worse, after the editing was done, the PDF files showed up online in a crawling speed. At one point, I was too anxious about the stalled process to keep my mouth shut. I caught Luc online and IMed him about my course. I asked why it had taken this long to create those PDF files. It did not even take this long to translate, I thought. “You can do it [file conversation] yourself if you want to see your course online sooner,” Luc typed in IM. Later when I saw him in Utah at the conference, he assured me, “I checked with the volunteers. They said you

have three very large PDF files over 80 to 90 pages long. Putting the files online is going to take a while but they are down to the three last files, and it will be completed by the end of this month.” That was September 2005, more than a year after I turned in my translation, nine months after the editing. As of the writing of this dissertation, those “very large” PDF files were still not online.

I did not know if my case was an isolated example or not until I heard Arnold’s story. In his case, the bottleneck seemed to occur at the editor. Two months after Arnold’s open inquiry about Mr. Wei, in November 2005, Arnold again posted his big question online. He asked, “Who is editing 15.812? It has been almost a year and half. I tried to contact the original editor Mr. Wei with no success.” Luc simply replied, “Nobody, no one is available to take over.” Seeing these messages, I was curious as to Arnold’s reaction. I immediately emailed Arnold and asked him what his thoughts and feelings were in connection with the stalled process.

This is what confused me... I submitted the completed translation on July 3, 2004. After a year and a half, there is still no course. This is abnormal. OOPS is eventually going to become stagnant and non-productive if everyone continues to focus on recruiting volunteers but not on publishing what has already been translated. I am sure most people would not want to see OOPS end like that. If one editor disappears, they can go ahead and find another one (the disappearance happened more than a half year ago). Those involved should not let the course just “hang”...From the beginning (before OOPS even had its name) I have been in touch with the translation administration. My feeling is, this project seems to go in the wrong direction; the focus seems too much on media promotion and not really on the project itself. This is not a good thing...Luc is making a wrong move...OOPS’ advantage is flexibility and speedy integration. I don’t know if Luc has thought about the way it is now. Unless due to unforeseen external forces, I think we should always finish what we have started.

I sensed that there were some real problems with the many stages before publication. While Arnold and I were exchanging these emails, another online posting drew my attention. “I have repeatedly emailed level-one translation at the end of September and the end of October, in addition to several email inquiries. However, I have never received any response. Then I received this upsetting email today.” The upsetting email that this volunteer received was an email sent by the administrator to inform the volunteer that since OOPS had not received this member’s work within two months, OOPS would have to re-open this course for adoption. I was very surprised to read this posting and imagined how disappointed or even hurt I would feel if the same incident happened to me. I was touched by the persistence of this volunteer but wondered how many people would act like this person under a similar situation? I asked Arnold of his reaction to this incident. Arnold replied,

I have never met Luc... I once thought about taking a trip to Taiwan and meeting with Luc.... But many things, as I mentioned to you before, are different in China. It is not always that easy to make things happen... I tip my cap to Luc’s noble spirit but then from the way he promotes OOPS, I see the unethical side of him... From what I can tell, he did not see the whole picture from [what is perceived to be] the standpoint of online education. It appears he is going in the wrong direction...As a result, he did not establish a successful infrastructure for handling translation and editing. Situations like this [as mentioned in the thread] should not happen...

This was the first time Arnold mentioned to me his intention of meeting with Luc.

I asked Arnold to elaborate on what he would say to Luc if he could meet with him.

I wanted to discuss with him how we can establish a learning platform. This is really the key to how we can utilize these materials and the process where learners can see and feel the practical [aspect of this project]. This is eventually the final destination of OCW. Based on these materials, integrated with iCampus and such sites to simulate learning and teaching,

ordinary students can then enjoy top university material in this virtual environment. This is like the movie Matrix which simulates a “real” learning environment. In addition, I also wanted Luc to really understand about the teaching and learning environment in China and see what China needs. Of course, if he is willing, maybe we can still collaborate with CORE.

Yes, a learning platform, a learner community, something beyond volunteer recruiting! Why was this important? Arnold probably had already shared with me his view about education in our second Skype session.

There are three kinds of people – the ones who are changed by others, the ones who change themselves, and the ones who change others. . I think the best people are the ones who can change others or the world. Only humans can improve their own society. Even in marketing, the human being is a very essential component. How can you change people? You educate them.

In Marxism, from the perspective of capitalism, capitalists care about Surplus value, about the capitalistic exploitation of the working class. For capitalists to get more from the workers and to increase the surplus value produced by the workers, they can make the workers either work longer hours, or increase their production through education. Capitalists in power positions send the workers to college and other institutions so they can learn more and thus increase their productivity—their goal being that they can get more out of their workers. Teachers are the ones giving education.

... So education is the way to insure social and economic progress. Therefore, teachers play a very important role. “Teachers” include textbooks. From this perspective, education can change society and the world. Education is the one thing that can without question propel the world to make progress.

#### Doris: It's Impossible for Me to Just Sit There

I was wrapping up my research and engaged in final dissertation writing. One day I received an email from Doris with the subject line “Field-specific mistakes found on 9.57J / 24.904J 2001 Language Acquisition, Fall 2001.” In this forwarded email with

conversations between Doris and Luc, it appeared that Doris was browsing through the OOPS course update list, a habit of hers as she once told me, and found some “serious field-specific mistakes on linguistic terms and theories.” Doris once told me in our Skype conversation that “I pay special attention to the course update page. This is my first stop every time I visit the OOPS web site. I like to see what courses have gone online recently.” In this visit, Doris saw something not acceptable. Doris immediately volunteered to revise it and asked Luc to take down the course in the meantime. According to Luc, taking down a course was not that easy. Doris replied, “We can only hope that no one else with an academic background in linguistics will read it for the time being.” In a separate email, Doris asked me,

Any thought or comment after reading the email between me and Luc that I forwarded to you? To me, field or academic specific mistakes are very serious because those wrongly translated/interpreted terms won't make any sense at all and they look really ridiculous for people who know. Let me give you 2 examples.

In linguistics, there's a very famous theory called "The Government and Binding Theory" proposed by a world-renowned linguist, Noam Chomsky, a senior professor at MIT. In the course translation, the theory is translated as 政府約束論, which is completely irrelevant. It should be translated as 管轄約束論. I'm afraid that OOPS may have an embarrassing situation. Of course, I'm not blaming the translator or Luc as the editor. However, I assume that the translator, a junior majoring in applied English, should have done some research on the internet. I tried to Google several of these terms and I found appropriate Chinese translations, meaning that this information is available.

Another example is about "case and agreement" which is translated as 案例與對應關係. Cases (格/位格) refer to subjects/objects; agreement (一致性) refers to the consistence of cases.

Doris amazed me once again. She did share with me once before that she had the habit of checking newly online courses. During our interview process, Doris had, more



than once, voluntarily forwarded me the emails she sent to Luc regarding her spotting of inappropriate translations. Each time, she would point out inappropriateness and offer suggestions. The examples Doris pointed out this time appeared serious to me. If it was a well-known theory in the field, it had to be translated correctly. The "case and agreement" example just told me how important it was to really know the subject area well enough to translate. "Case and agreement" could mean many things but only one thing in linguistics. This example also demonstrated the danger of translating slightly "out of the context." This was my personal experience as well. When there was little information other than a stand-alone sentence, at times the translator might have to guess the meaning. Out-of-context certainly was not the excuse in this case, however. I remember I had asked Doris before why she would read other volunteers' translations and offer correction voluntarily. The reason she offered was she liked to study other members' translations. Was that all? Why did she like to check those courses? Why, in this case, had she even volunteered to revise it? I asked. Below is her reply via email.

It's impossible for me to just sit there after catching some mistakes, very serious and terrible ones in this case, but do nothing about it. This "error correction" tendency is again one of teachers' habits that I seem not to be able to get rid of. HaHa!

I usually read translations of courses that interest me. If the translator and editor both happen to be professionals in that specific field, I'll read more carefully to see if I can learn something from them. For this linguistics course, I simply can't ignore those serious mistakes. I know Luc may have problems finding an editor with a linguistics background, so I volunteer. Sounds crazy, huh?

Over the next few hours, I received two more emails from Doris. In one email, Doris asked me to go over the revision she had attached. "As someone without a

linguistics background, do I need more explaining of the terms?” Doris asked. In the second email, Doris solicited my opinion about a translation for a specific word within a sentence. I emailed her my feedback and asked her to take her time. In her next email, she contested, “Time is the luxury that I don't have since this course has been posted online. I don't want to see OOPS' credibility in doubt and criticism because of this particular course. It's very possible that anyone with linguistics background spots these serious errors before my revision is done.” Doris' dedication to OOPS once again impressed me.

One time I asked Doris about her volunteering experience. Doris said:

From the perspective of giving, we are giving the little advantage we have in our English ability. Translate these courses to Chinese. We also have taking, this is something I have always emphasized. During the process, we learn too - no matter whether it is about translation, or it is about the content area. Oh, so that is the case? Personally, I feel I take more than I give.

Since Doris and I shared the same religion, the conversation quickly turned into her volunteer work at a San Francisco temple. Doris shared with me how her involvement with this Buddhist Master started when she was going to school in Fresno. Years later this master now had a temple in San Francisco and “the moment you open your door, you need to cater to the American audience.” I was intrigued by her volunteer work with the temple and asked her about her translation work there. Doris answered,

... sometimes you have to translate its meaning instead of literally. Since your audience is composed of Americans, they may not be too familiar with many Buddhist concepts. If you use too many terminologies, they may not be able to get it. The purpose is for others to understand the Buddhist works, so there is no need to be literal. We pay attention to our target audience. We try to avoid scaring people off. But for Buddhist teaching, that needs to be closer to the original.

We talked more about her work with the temple and how the work was coordinated now that she lived in Malaysia. She felt privileged to listen to her Master's sermon, recorded in digital format and then transferred to her via the Internet. Since this was a voluntary task, there was no time pressure. As a practicing Buddhist myself, I know the difficulty of translating Buddhist terminologies between Chinese and English. "I think ability is secondary, willingness is the most important," Doris commented. "Why do you have this willingness?" I probed.

(pause) This is a very big question. With my limited time, this is what I can contribute. I benefit too, from listening to the master's sermons, since I am not there and cannot hear them. But now that I have volunteered, now I can hear all of it! These recorded tapes are not open for circulation. If you want to hear them, you have to be present! Because of my volunteer work, I have the advantage to [listen to the tapes]. I think I am the one who gains more benefits.

(pause)

Do you think I have too much internal motivation?

Suddenly, Doris leaped over my sense of ambiguity about motivation and carried me where I had hoped earlier to get. Why is internal motivation necessarily a bad thing? Why does being self-serving become so undesirable? She said it; she said it herself! I cannot imagine any other way to keep a volunteer at work if those of us who volunteer did not get something out of our efforts for our own satisfaction. I remember a very early conversation I had with Arnold. We based our conversation on the analysis report he had created for CORE. One of the questions I asked was: "In your report, you said 'as a volunteer translation, the best award I have received is the learning opportunities gained through translation' What do you mean?"

Arnold: I live in a very small town where outside resources are limited – not like someone at Tsinghua University or Beijing University. Being involved with OOPS gave me an opportunity to see the outside world, from one of the top universities, see how they learn. My approach to those materials is from a learner’s perspective, not from a teacher’s. This is a way of learning.

Grace: What have you learned?

Arnold: The experience has changed some of my perspectives about marketing. I learned marketing from the book by Philip Kotler-- didn’t read it page by page but I read most of it. But after I finished translating these two courses, I obtained some different perspectives about marketing....Maybe these courses cannot represent the entire western perspective, but at least the course content could represent the current trend and emphasis in that area. Even if a person is the authority in the field, he or she can only be the authority for a period of time, not his or her entire life. So maybe we can see that the academic wave of American. 4P represents the older paradigm. It is a classic. Now Americans are talking about 4C, but in China, I have not seen any book talking about 4C. Like in 15.810, the graphic still showed 4P but what was emphasized had changed.

I remember one time in an email, Doris told me something unexpected, “My husband feels very confused about why two volunteers (you and I) take their voluntary work in such a serious way. He overheard our Skype conversation the other day. He doesn’t really support me very much in my involvement in OOPS (he thought it was to kill time), but he doesn’t have any negative attitude either.” I can see why people were confused about our dedication since I was often puzzled at the phenomenon myself, a set of circumstances in which I was an insider, not an outsider.

## CHAPTER NINE: MICRO STORIES OF OOPS

As I approached the end of this leg of my inquiry, I realized OOPS stories involved two distinct, yet interwoven, layers: micro stories and macro stories. OOPS' micro stories addressed the question of why people volunteer. In answering that question, we also saw an intimate view of how online relationships were developed in a knowledge community where narrative authority legitimized people's voice and action. Zooming out from this close-up, I then saw the macro stories that involved the organizational issues of leadership, collaboration, decision making, conflict resolution and more. Micro stories nested inside the macro stories to form the OOPS stories.

### Witness to Idealism

If "human motivation and behavior is always and everywhere an elaborate mix of factors," (Weber, 2004, p.13) then what the narrative provides is a starting point leading into a much more complex blend of more questions to come. I moved from skepticism to being convinced through the narratives as I realized the question of motivation might be the easier puzzle to solve in the OOPS phenomenon. In part, I felt somehow defeated to have come this far only to uncover something seemingly obvious. However, I also realized that what seemed clear at the end was not as crystal clear at the beginning. This journey helped me make this discovery. So, why do people volunteer?

### *Why People Volunteer?*

In 2005, OOPS conducted an online survey in which one of the questions required that we discuss the reasons we volunteered. Table 6 shows the final results from 788 respondents, of which 180 were OOPS volunteers. Interestingly, the most frequently selected response was self-learning (50). Forty-four volunteers believed knowledge

sharing was important, and thirty-three people joined OOPS because they wanted to help others. It appeared that many OOPS volunteers, especially translators, wanted to translate a particular course because they were interested in learning about that subject. In addition, as illustrated by Jessie's growth in four months through her online posting, learning came as the by-product of participation, whether one anticipated this benefit or not. "Learning through participation" seemed to be important during OOPS' early formation stage and continued to have larger implications as OOPS tried to communicate to the world what it was doing. The survey also seemed to indicate that being involved in something rewarding by means of self-learning could be a vehicle to sustain this community. We will see more clearly the relationship between self-learning and sustainability when we explore the concept of knowledge community. At the early stage of OOPS, altruism seemed to create the first wave of force that embodied OOPS as OOPS.

Table 6. OOPS 2005 online survey: motivations to join.

1. Knowledge sharing	44
2. Helping others	33
3. Convinced by other volunteers	6
4. Self learning	50
5. Leave something for the future gen.	12
6. Nothing bad about this project	17
7. Have some free time	6

I asked Luc on several occasions why he thought OOPS had drawn so many volunteers. Most of the time, he said he did not know, but once he replied, "because OOPS is inspiring." OOPS did appear to be inspiring, motivational not only to volunteers but to people who had heard about it. For example, I learned from Arnold's narrative that

OOPS' goal matched his personal vision, which he had conceived as early as five years earlier. In Filestorm's case, he saw his role in OOPS as his way of making China a better country. Jessie, on the other hand, liked translation, and OOPS gave her an opportunity to give it a try. Beneath the personal-relevance of the group's activities came the personal goals of individual participants. One way or another, by participating in OOPS, my participants fulfilled their various personal goals one small step at a time. Like my participants, what was relevant to me was to "scratch my itch" of wanting to give translation a try and wanting to see what MIT students were learning.

In addition, as a member of a democratic community, a volunteer self-selected his or her tasks. Even though my research focused mainly on the translation portion of OOPS, there were many volunteers who were involved in administrative or technical aspects of the project. Illustrated earlier in the volunteer-wanted statement, OOPS maintained its open-door policy, opening its arms to everyone willing to volunteer. OOPS took a modular approach, breaking each task into smaller portions. This way, volunteers had many "success" opportunities throughout their involvement. Self-selection promoted not only self-confidence but also encouraged personal relevancy.

Furthermore, OOPS projected the opportunity for positive consequences. Luc wanted a society with hope; Arnold envisioned an education more reachable by millions; Jessie saw the chance for the Chinese community to acquire world-class materials; Filestorm believed OOPS helped the advancement of China. More importantly, all volunteers' work, regardless of what it was, once posted online, will be accompanied by each volunteer's name and a brief biography, something that positively reinforced

individual responsibility, as expressed by Doris. Seeing their work online could be one of the most satisfying feelings a volunteer can experience.

What has been illustrated so far expands what the literature has to say about why people volunteer. For example, Bonk (2001) conducted research with people who shared their instructional materials either on MERLOT.org (“Multimedia Educational Resource for Learning and Online Teaching”) or the World Lecture Hall (WLH) web site. The survey asked participants why they were willing to share. “Course sharing is important” was the most frequently selected response (53 percent), which seemed to be similar to the response that they wanted to “share theories or strategies” with their colleagues (38 percent). Similar sentiments about the importance of knowledge sharing were expressed by OOPSers. In addition, forty-five percent of survey takers in Bonk’s study indicated that they were engaged in knowledge sharing simply for personal growth as professionals. We see that Jessie seemed to have enjoyed her growth as a translator through her interactions with others online. Furthermore, roughly sixteen percent of the survey respondents regarded sharing as a means of making their names known to others, as a way to experiment with their teaching materials, or simply because their involvement had been fun. We can trace the similarity from OOPSers as well.

Literature in volunteerism also indicated similar motivations for volunteer work. For example, in a study conducted by Multiculturalism and Citizenship Canada (1992), among the reasons why people volunteer were achievement, recognition and feedback, personal growth, giving something back, bringing about social change, and friendship, bonding, and a feeling of belonging. From my own experience, I knew I enjoyed the tremendous personal growth I achieved by learning how to translate. I know I also



wanted to help. Judging from our narratives, we seemed to be able to relate OOPSers' inspiration with this list. We can see the emphasis on personal growth in Jessie's narratives, Luc and Arnold's convictions they were bringing about social change, and the feeling of belonging that perhaps came to Luc, Arnold and Jessie as they expressed the togetherness as a Chinese community. Literature seems to confirm the apparent reasons why people share and volunteer.

### *Satisfaction and Hazard*

To this day, I return to my conversation with Doris on that August day when she admitted her "internal motive" as part of her satisfaction of volunteer work. In Robert Coles' three-decade-long work on volunteers, he interviewed many volunteers, young and old (Coles, 1993). In his writing, Coles artfully teased out the volunteers' satisfaction while involved in serving others. One of his participants called himself a "hypocrite" if he did not admit that he liked doing what he did and feeling good about what he did. Another one of Coles' participants finally admitted that, after a long discussion with Coles, it was "self serving" motives that kept him at the service. "Under the rubric of satisfactions," Coles asserted, "the unquestionable pleasure many young men and women have taken, not only in the value to others of their community service work but in the value it can have for themselves as well" (Cole & Engestrom, 1997). Coles categorizes satisfactions into "something done, someone reached," "moral purpose," "personal affirmation," "stoic endurance," and "a boast to success." Many of the categorizations could apply to OOPS' volunteers as well.

For example, in an unselfconscious way, Luc regarded himself and OOPS volunteers as heroes: each one of us a witness to social change and a participant in it. Luc

believed OOPS was and is the “hope” for this hopeless society; Arnold held that “the world could be a beautiful place,” with the contributions of OOPS, and Doris excitedly expressed her view of OOPS as “the world still has hope.” The more clearly we became aware of that moral strength, the more solid our sense of our own purpose in OOPS, or even in life became. I also witnessed many indications of “stoic endurance,” of which Filestorm could be an example. As I interacted with my participants, I became their “student,” learning about them and their endurance. Overwhelmed by what I learned from my participants, I was most aware of their efforts to balance their idealistic motivation with the partialities required. The word “volunteer,” *voluntas* – a choice – comes from *velle*, to wish. At times, the wish comes with unexpected consequences. Doris mentioned that her husband was not supportive of her volunteer work and wondered why the two of us would spend time discussing it. At times, we even “have to take insults,” said Doris, referring to the anonymous guest’s groupthink comments. Arnold often compared himself with Luc. Seeing what Luc was able to begin, in his bitter-sweet tone, Arnold called himself a “little person,” someone who cannot realize his own idea given the circumstances. I experienced the fatigue when at times I felt that the coordination work with the transcription project took too much time. Sometimes, like Jessie said, we celebrated “many hands make work light.” Sometimes, like Filestorm shared, we questioned “there is only so much a person can do.”

*Myth #1: OOPS Comprised of Like-Minded Individuals*

Within the constellation of individual motivations lie the profound differences in each volunteers’ vision for OOPS. OOPSers did share a common goal – knowledge sharing. However, not everyone agreed on how to go about sharing that knowledge. The

heated and never-ending online debates about quality and the CORE-OOPS relationship provided two examples. It is important to keep in mind those arguments about both technical (translation) and organizational issues. As I described earlier, these debates were often intense and emotional. If OOPS were simply the collective creation of like-minded individuals who cooperated easily because they were bound together by a shared belief, there should be little disagreement in the process.

### *Constellation of Motivations*

Labeling is imperfect. However, if I have to describe a “typical” OOPS volunteer, this person would appear to be someone who felt part of a Chinese community, who was proficient in both Chinese and English, who was committed to the shared belief of knowledge sharing, who had learned tremendously in the process, and had fun along the way. This person would be optimistic about the future and care less about money than about time. The individual learning acquired was among the main reasons why this person would choose to contribute more time and effort in the future.

For Doris, translation was a thing of beauty, and to be an OOPSer was a high-stake endeavor in a personal sense. From her interviews, we saw that free choice made her efforts self-consciously more than either a hobby or a job. In other words, the real-time, peer-review “social pressure” encouraged her to go beyond her call of duty. For Jessie, having one’s translation, or one’s suggestion for translation out there for all to see can be a humbling experience. For Arnold and Filestorm, OOPS scratched their “itch” for a future online education platform. For Luc, I can only imagine his emotional experience of creativity, the ardent satisfaction of making something new and making it work across cultural, Chinese communities and time.

Roughly, there appeared to be four groups of OOPSers, not distinctly separated but rather interwoven.

- Learners: They were inspired by the learning experienced from the community, and they brought intellectual stimulation to the community.
- Believers: They had the conviction that knowledge should be free.
- Fun-seekers: They were the ones who made this community “crowded” by showing their affection and humor.
- Futurists: They were the ones that believed, in various forms, that education can change human life for the better.

The constellation of motivations offers a glimpse, yet at the same time, a rich understanding of the ways in which individuals think about the benefits and consequences attached to their as well as OOPS’ different course of action. A person’s commitment to service, as well as the nature of its resultant satisfaction and unexpected hazards, all become part of a person’s life. “The call of service is a call to a new chapter of a life – its earlier story comes to bear on what happens in the future - though each person’s idealism can have its own surprising victories, some of them achieved against the great odds of a particular past” (Coles, 1993, p. 143). We see how many of the OOPSers brought with them their past: Luc’s wealth and fame, Arnold’s long-term idea of online education, Filestorm’s suffering in a punitive educational system, Jessie’s strong statements and enduring personality, Doris’ “teacher habits,” and my passion about helping others. As OOPS evolved, each one of us realized we were involved in something larger than the sum of the parts. In this inquiry, however, self-learning bubbled

to the surface as a paramount factor for volunteering. This aspect deserves a deeper level of unpacking, which I now turn to knowledge community and narrative authority.

### Knowledge Community and Narrative Authority

Doris and I seemed to have formed the most obvious knowledge community through our inquiry journey. Our relationship started out as a contrived one in the sense that I asked her to be my research participant. However, the relationship was created through our shared experience as OOPS volunteers. From the beginning, I learned tremendously from Doris about her OOPS experience. As our relationship strengthened, I began to see how our dialogue had helped create new knowledge that would have been impossible without each other's company. As Doris and I went back and forth in time, places and events, we explored the hidden challenge of editor shortage and the never-ending debate about quality. Doris helped me understand that editors perform two jobs of translating and editing. She empowered me to think critically about the insider-outsider divide. In return, our conversations seemed to empower Doris to be more vocal with her opinions online. Our conversations also allowed Doris to think more critically about translation quality as she expanded her knowledge community to include her former colleague. As Doris and I shared our stories and responded to each other's stories, I saw that Doris, from time to time, shifted her knowledge community boundary to include other people such as Luc and her former colleague. Our personal experiences placed us at different places on the OOPS landscape where Doris helped me see the work of an editor and I shared with Doris my several encounters with Luc, whom Doris had yet to meet. When Doris shared with me her criticism of Luc, I was confirmed that we indeed had a knowledge community where Doris felt safe enough to share with me her true feelings.

In our knowledge community, Doris and I often reinforced each other's narrative authority through our common experience. We were both very self critical of our translation work and spent a tremendous amount of time researching and proofreading. We both felt that most volunteers were responsible and trying their best to produce quality products. Doris often mentioned our prior conversations as evidence that we were vigilant in regard to many OOPS challenges. On several occasions, Doris referred to those discussions, which she co-authored, as her source of narrative authority. In the case involving groupthink, Doris asserted that she and I did talk about those issues, a conversation that took place in our private knowledge community and therefore not available to an outsider.

The most obvious statement about Doris' appreciation of our knowledge community came when she addressed the issue of sustaining volunteers. In that conversation, Doris revealed that my presence might help bring the sense of community togetherness to her, something that seemed important to Doris in asserting that volunteer quality outweighs quantity. I also believe my presence helped Doris become more assertive about her narrative authority. Through our extended dialogue via emails and Skype conversations, Doris became increasingly confident about looking into her own experience as the source of knowledge. When joining the online debates, Doris repeatedly emphasized that her comments came from an "active volunteer," from "my personal view point as a volunteer." In many cases, Doris confirmed her narrative authority with me in our knowledge community and then further expressed it publicly online. In addition, I also saw how Doris went back and forth in the online social milieu to revise her narrative authority by asserting that what she said "does not represent OOPS

or other OOPS volunteers.” In a way, Doris’ narrative authority was constrained through the social interaction. In Doris’ view, Luc represented OOPS while she represented herself. Such a constraint, however, could be characterized by Doris’ intention to protect and defend the community from further attacks because of what she said. Furthermore, in an unexpected way, Doris used her narrative authority enhanced by me in our knowledge community to express her knowledge authority to Luc. In the case where she believed her translation was ruined by an editor, Doris cited my name in her email to Luc. Obviously, our knowledge community dialogue further confirmed her narrative authority, which she then expressed in the confirmed version to Luc. In the same case, we can see why Doris might need my confirmation of her narrative authority, which was constrained by the editor’s less-than-desirable editing work. When Doris’ narrative authority was constrained (“I believe my judgment cannot be so terribly wrong”), she sought confirmation with me in our knowledge community.

My knowledge community with Arnold was less obvious, even though I believed it did exist. Our relationship also stemmed from our common experience as OOPSers. On several occasions, Arnold criticized Luc for the inappropriateness of his marketing strategies. Again, I felt Arnold must have felt safe to share with me his critical opinion of our leader. Like Doris, Arnold seemed to have shifted his knowledge community boundary to sometimes include his CORE connections. Arnold and I came from two different regions and therefore held different perspectives about things in general. As a result, I learned from him the view point of a China citizen while I shared with him my perspective as a native Taiwanese. Because of these differences, in our safe knowledge communities, much new knowledge was created. Similar to Doris, Arnold gained his

knowledge authority as an active and long-time participant of OOPS. Always ready to recite the exact time and date he joined OOPS, Arnold's seniority enhanced his narrative authority, especially when he publicly offered his opinion. In other words, Arnold drew part of his narrative authority from longevity in the community and his involvement in both OOPS and CORE. In addition, Arnold also emphasized his marketing background, his past and present experience in this field, as his source of authority when pointing out Luc's promotion strategies. I enhanced Arnold's narrative authority in our knowledge community, and also in an unexpected way but similar to Doris, Arnold referred to me when writing to Luc. In the story of an online discussion about CORE and OOPS, Arnold expressed his opinion online. In his posting, he mentioned his conversation with me as his way of showing the legitimacy of his comments. I saw that Arnold revised his narrative authority as his involvement with both CORE and OOPS continued. Arnold went back and forth between saying there was nothing to compel both sides to "feel they must be together," and "I still hope both sides could collaborate one day."

Unexpectedly, in my knowledge community with Arnold, I felt my narrative authority was constrained by Arnold's narrative authority, something I did not experience with Doris. I felt Arnold owned the authority about China-related issues. As a result, his view about why a volunteer-based project would not work in China constrained my enthusiasm for an opposite view. Arnold's view about the CORE-OOPS issue became the dominant topic in our dialogues. This was also where, I believed, Arnold's most outwardly expressed narrative authority lived.

The above analysis confirmed much of what was said in the literature about knowledge communities and narrative authority. However, the literature only addresses



knowledge communities and narrative authority in a face-to-face environment where narrative is expressed through live conversations. The narrative in an online environment that was expressed mostly in text and usually mediated by computer, offers a different set of characters that calls for an expansion to the current literature.

### *Expansions of the Literature*

I have argued that knowledge communities were formed between each of my participants and me. It is important to note that, except for Luc, whom I met only three times face to face, I had never met any of my other participants. Was it possible to “know” others online and create a trusting and lasting relationship? Did I really “know” who they were? Were they really who they said they were? Based on my inquiry, the physical distance did not seem to be a factor in our relationship building. In addition, there were plenty of ways to triangulate their identity. For example, Arnold, Doris, Jessie, Luc and I all had translated courses that were put online. Our names and brief biographies were published with the courses. The online information about them and the information they provided to me had always been consistent. In addition, in my inquiry, my participants coincidentally would mention each other. If any one of them created a fake identity, then I was not the only one fooled by it. Furthermore, my inquiry was about the OOPS phenomenon as I observed it. The “fake,” if it was fake, became the “real” as it was what I observed and vicariously experienced.

Along the line of online identity, many online postings were written anonymously. What does anonymity mean in relation to the notion of a “safe” environment, as one of the important constructs of a knowledge community? I could argue that anonymity helped create a “safer” environment where people could say what

they really wanted to say, even though we, the readers, would not know who wrote the postings. I could also argue that even if we sign our online name, we still did not really know the real person behind that signed name. On the other hand, I could also argue that if the person really felt “safe” about this environment, why would this person need to express his or her opinion anonymously? Take the example where Doris was publicly “attacked” online. Was that a “safe” environment? I know when I was publicly “attacked” online, I certainly did not feel “safe.” The real question, then, becomes, what is “safe” in an online environment sufficient to constitute a knowledge community? Can we conceptualize the greater OOPS landscape as a knowledge community, as expressed through the online discussion forum?

Another characteristic of a knowledge community is that its participants are engaged over an extended period of time. During this time, new knowledge was created and stories were shared. In an online community, not only do we have issues with individual identity and the perception of safeness, we also run into the issue about time. Take Jessie for example. She gained her reputation through her long-time engagement online answering translation-related questions. For Jessie, those discussions inspired and sustained her as she called them a “humbling experience.” If we consider the online forum one of Jessie’s knowledge communities, then most of the people participating in discussion came and went. They usually stayed for a short period of time, usually until they received what they came for. It was also possible that a person just happened to stop by and contribute to an on-going discussion. These people obviously did not engage with each other over a long period of time. Do we trust what they say online? Do we need to engage with others for an extended period of time in order to trust what they have to offer

in an online environment? I could argue that since online discussions were archived, it served as the communal memory, something I argue can be even more robust than human memory. In a face-to-face setting, trust could be built based on our memory of prior conversations. Is it possible that in an online environment where all conversations were saved and open for public access, the “time for engagement” could be expressed in two forms: the person and the message? If a person engages with an online community for a long period of time, this person could gain his or her reputation due to seniority. If an online message is active for a long period of time, this message could help newcomers understand the history, dynamic and norms of this community, therefore fostering trust in its members. In this sense, then, I could also argue that in an online knowledge community, the membership is highly fluid and the boundary is constantly shifting. Asynchronous communications bridge the issue of time and create an environment that, at times, it is not who the poster is but what he or she said that matters.

In addition, in a computer-mediated environment where access to discussion is open and particularly in OOPS where even anonymous guests could put in their thoughts, many members choose the read-only option by lurking the postings and consuming the exchanges. Such behavior is positively reinforced in online forums. Do those anonymous users consider the forum their knowledge community? How do we account for their own individual knowledge construction, or the new insights brought forth by them to the community? It is possible that a one-time visitor’s constructive feedback encouraged someone else’s critical thinking about a certain issue. Because all postings are archived, they could be revisited, reexamined, and responded to without the limitation of time. By the same token, how do we figure in the tensions a bystander might cause the community

by their passing remarks? Can we count these postings part of the knowledge community conversation? Is it possible that “time” became more transparent when compared to a face-to-face community?

If we agree to conceive of OOPS’ online forum as a place to foster a knowledge community, then it seems more likely that members “join” the conversation through an engaging event that emerged as a product of heated debate than through a common experience, a phenomenon worth examining. Obviously, the apparent insider-outsider divide was caused mainly through something I called *experience asymmetry* when members were placed at different places on the OOPS landscape due to their different past experiences. Experience asymmetry simultaneously fosters new knowledge creation but also creates tensions. Both new knowledge and tensions could become the driving force for members’ further engagement in the discussion, which in turn will create more fresh insights and frictions. New knowledge might be created when the gap between the asymmetrical experiences is narrowed. Through the on-going debate about quality, both Doris and I became acutely aware of our responsibilities as translators. In other words, the online social milieu, combined with our private knowledge community conversations, helped us see multiple dimensions of the same issue from a broader perspective. Similarly, more frictions could also be produced when members fail to bridge their asymmetrical experience. China’s and Taiwan’s cultural and political differences caused Arnold to question Luc’s direction in developing OOPS. Luc never made his decision-making process transparent to me and to the community, which caused me to question his direction in developing OOPS as well. I cannot get into Luc’s mind just as Arnold cannot. Luc, on the other hand, could not relate to us when we questioned his authority.

The phenomenon of experience asymmetry as played out in the OOPS online forum caused me to re-examine the notion of a “safe” online place. Can we say that the online place is a knowledge community because it fosters new knowledge creation? Or can we say that the OOPS’ online place is not a knowledge community because it creates frictions?

The questions raised so far about an online knowledge community set the stage for the examination of how online narrative authority could be developed. For example, I saw that Arnold exercised his narrative authority online and with me regarding his opinion about the structural issue in OOPS. His view, however, was constrained by many counter opinions, including my views and Luc’s. Jessie often offered her strong opinion, including her view about translation as a technical process, a view not shared by many, as she herself admitted. I could see that narrative authority could also be developed and expressed online, just as it could be developed and expressed face-to-face. The question remains: does narrative authority have to be developed in a knowledge community?

Thus far, I have shown how narrative authority could be expressed in an online environment similar to a face-to-face environment. However, in certain instances, asynchronous communication further enables those expressions. For example, we can easily forward a prior email conversation with one person to a third person to help establish our narrative authority or to constrain the third person’s narrative authority. In a way, forwarded emails, in this example, create a form of “evidence” that might be more convincing than what we might be able to establish in a live conversation by citing another conversation of which the third person was not a part. Up to now, I have also illustrated how an online environment expands existing literature on the nature of the

knowledge community. The major issue centers on the notion of online safeness. Frictions promote tensions and, if fostered positively, could transform into synergy. Even if an online environment were threatening or intimidating, such as OOPS became at times, we have to remember that participation was always voluntary and departure was always an option. Therefore, I argue that if people choose to stay and join the debates, then the environment must be “safe enough” for them to continue such an engagement. As a result, I believe that we can conceptualize the OOPS online forum as a knowledge community, given that we have to also re-conceptualize the notion of time, identity, fluidity of boundary, in addition to paying attention to something I call experience asymmetry, which I now explain further.

#### *Experience Asymmetry*

First, let me describe what experience asymmetry is. As I explained earlier in this narrative, each one of us has access to different experiences, which were constructed, as Dewey said, in a manner that can be described as individually continuous (time) and socially interactive (people). However, our unique experiences remain individual property. In other words, these experiences might be shaped by the social milieu through interaction with others, but they still belong to the individual. When my participants and I navigate in the three dimensional narrative inquiry space of time, people and place, these different experiences, competing at times, might be located at different places (place). This distance between the two places then creates the phenomenon of experience asymmetry. As shown in the narratives from Chapter Five, Six, Seven and Eight, when we have access to different experiences, we might arrive at different understandings, therefore creating a distance between the two people.

Next, let me recount how I discovered experience asymmetry. In Chapter Six, I detailed the stories about quality debate. Because I had seen too many similar debates about quality throughout my involvement with the project, I was at a point of fatigue, feeling “we” might never get our points across to “them.” I felt I was never able to invite “them” into “our” shoes, to experience what “we” were experiencing and maybe to arrive at some common understandings. My feeling about this apparent insider-outsider divide was crystallized through my conversation with Doris. In the Skype session that Doris initiated, she started discussing her conviction that the “guest in the dark” needed to be “a volunteer first in order to understand the process first hand.” Doris complained that the guest talked strictly “from a bystander’s view,” and therefore questioned “how do you [the guest in the dark] know how this team operates” when the person “does not have inside information and experience.” In Doris’ view, “if he has experienced OOPS, then he knows.” At this point, I probed further. I asked Doris why she believed that if a person did not have OOPS experience, he or she could not understand how we operate. Doris insisted that “once he is a volunteer, his suggestion could better reflect areas needing improvement,” “unless he has experienced it, he cannot appreciate it,” and “if they are not in our shoes, how could they know how we feel exactly?”

To contrast the insider-outsider divide, Doris maintained that her arguments against the guest were “from the perspective of a volunteer: this is the OOPS I know.” Certainly Doris and I had numerous conversations about many of the challenges the project faced. Doris and I were very aware of those challenges. As Doris said, however, the guest did not know we had conversations about those issues because “we didn’t tell outsiders that we are also concerned about these issues.” As a result, the outsiders “are

talking as if we are not even aware of such problems at all.” Doris argued: “how do you know I have no doubts [about this project]? Many things happen behind the stage that he did not see. Like you and I often talked about how to improve quality, how to recruit more people...but he did not know.”

It was through this series of conversations that I began my conceptualization of experience asymmetry. Doris’ knowing about this insider-outsider divide matched my personal speculation. Therefore our conversation strengthened our knowledge authority in regard to this issue, and in turn supported my conceptualization. Our symmetrical experience, our shared understanding, rooted in our first-hand, long-term involvement with the project, provided a sharp contrast to the asymmetrical experience the guest had shared with us.

Experience asymmetry, in the debate about quality, created frictions and misunderstandings among community members. Once the term “experience asymmetry” entered my mind, I began to see many examples in this inquiry. For example, the CORE-OOPS saga provided another instance. In this case, however, the experience asymmetry existed first between the CORE and the OOPS at the organizational level. As Luc repeatedly emphasized his willingness to collaborate, we were left wondering why CORE continued to reject this idea. As Arnold indicated, however, the cultural and political differences between the two groups created the asymmetrical experience, which influenced the thinking and the ways both sides do things. Stemming from the CORE-OOPS conversation was the structural issue between a top-down and bottom-up approach. For Arnold, from what he could see and had experienced, a bottom-up approach guaranteed success. For Luc and many other OOPSers, myself included, an



organic grassroots approach inspired more creativity and possibilities. Our asymmetrical experiences landed us at different understandings and preferences in regard to how OOPS should be organized. Furthermore, Luc never tried to make his thinking or his plans transparent to the community, resulting in our questioning his direction in several instances. For example, Doris questioned why Luc did not spend more time in activities that would sustain existing volunteers. Arnold disliked Luc's way of promoting the project. I, on the other hand, complained about Luc's decision-making process. Arnold, Doris, and I had no access or, at best, limited access to Luc's thinking and experience. When our thinking and experience told us that things should go in a different direction, experience asymmetry occurred.

An asymmetrical experience could create constraints to our narrative authority. For example, in the CORE-OOPS story, Luc owned his legitimate narrative authority by having spoken with CORE. On the other hand, Arnold, as a CORE volunteer, also owned his narrative authority in this matter. Nevertheless, Arnold's and Luc's narrative authority constrained each other, partially due to their asymmetrical experiences with the matter. Luc as a native Taiwanese and Arnold as a native Chinese shared different views about how a project should and could be organized.

On the other hand, experience asymmetry also represents multiple perspectives, and therefore could be a synergetic source of learning, knowledge creation, and social interaction. When I first began this inquiry, I carefully selected my participants based on the belief that they knew something I did not. I wanted to learn from their asymmetrical experiences. Through this inquiry, I established knowledge communities with some participants, where we shared and responded to each other's stories. In that process, new

insights were brought up and new knowledge was created. Take Jessie for example. We learned that she enjoyed participating in online discussions about translation. Even at times when the debates became heated, she regarded her involvement as a “humbling experience.” From the logo voting story, we can see how some disagreement could stir up more discussions, creating a commotion of social interaction. I learned much from Doris, especially her perspectives as an editor, an experience that I did not have. I learned much from Arnold as well; his experience as a native Chinese was an experience that I cannot have except vicariously. In these examples, we tried to bridge the gap created by our experience asymmetry. The process of attempting to narrow that gap created new knowledge.

To summarize, experience asymmetry could be a source of friction or a source of learning. If we at least tried to bridge the asymmetrical gap between the parties involved, maybe in a knowledge community we might create more new knowledge and less friction. In other words, experience asymmetry could make a knowledge community less safe, creating intimidation and frustration. On the other hand, experience asymmetry encourages dialogue. It appeared from the narratives that the same tensions that had disrupted the community might also have the potential to strengthen a knowledge community stronger.

I continue to ponder what would constitute a healthy balance between acknowledging and bridging experience asymmetry in a community, and fostering cohesiveness so that the knowledge community remains a safe place for new knowledge construction?

After examining the micro stories of OOPS and unpacking their meanings to the participants and to the OOPS community, I now turn to the macro stories of OOPS.

## CHAPTER TEN: MACRO STORIES OF OOPS

OOPS' micro stories nested inside the macro stories to form the OOPS stories. In this chapter, we turn our attention to the larger organizational issues surfaced during my inquiry. These issues demanded our attention to the coordination of a group of talented volunteers to produce a result at the end.

### Blended Connectedness

Research has shown that online interactions could foster close relationships that are just as stable as those created in person (Bargh & McKenna, 2004). The authors believe that the distance that seems to separate online participants is exactly the reason why people grow even closer. During OOPS' early development, I cannot say if and how any close relationships were being formed among volunteers. However, one thing seemed apparent. Several face-to-face gatherings seemed to provide pivotal, catalytic effects in creating the sense of community. The online threads created in conjunction with those gatherings further bridged the online with the offline. The gatherings offered many attendees the opportunity to meet other volunteers. Those who could not attend, including myself and all of my research participants, read those postings and felt part of the community. Research in blended, or hybrid, distance learning has shown that students can achieve a better sense of community in a blended course than a fully online course (Rovai & Jordan, 2004). During OOPS' early development, Luc created opportunities for OOPSers to meet, both face-to-face and online. Such a blended connectedness proved important to sustaining this community. In the blended connectedness lies the issues of sociability and a sense of community that I categorized into the three board themes of

people, values, and events that are interwoven and, at times, hard to separate one from the other.

The category “People” encompasses membership that involves issues such as community boundary, identity, influence members have on the community and the community has on the person (McMillan, 1996; McMillan & Chavis, 1986), as well as who are the members are and how they can communicate with each other (Preece, 2000; Preece & Maloney-Krichmar, 2002). For example, when Jessie asserted in her online message that people who posted messages should “be a part of the solution, not part of the problem. Join in and attempt to influence the process in the directions you feel appropriate,” she spoke exactly about, how as a member, each one of us inherits the potential to shape the community. When I witnessed Doris’ immediate, almost reflex-like reaction to some translation mistakes she spotted, I cannot help but wonder whether her wish “that no one else with academic background in linguistics will read it for the time being” reflected the community influence on her. Between her personal involvement in online discussion about quality and her personal “attack” by an anonymous guest about quality, I came to the logical conclusion that the community has influenced her thinking and behavior (Bonk, Wisner, & Nigrelli, 2004).

In addition to “people,” one of OOPS values, the open-door policy, heavily influenced how members joined and communicated with one another. In OOPS’ early stage, and throughout its development, the open-door policy played a central role as one of the governance principles of this community. This low-entry-barrier policy certainly had encouraged much participation. The stunning growth of volunteers from approximately three hundred when I joined in mid June 2004 to over seven hundred by

December of that year provided testimony to the importance of this open-door policy. People draw people, both in quality and quantity. In the self-selection process of elimination, we learned from the narratives submitted by people who were the volunteers. Such value about openness also encouraged member communication. The online discussion forum was an open access forum where anyone without registration could read and respond to any postings.

Of course OOPS' value also involved its mission, which influenced people's motivation for joining. From the narratives presented earlier, OOPS volunteers exhibited a constellation of motivations that mostly matched their personal goals. Nevertheless, the success of creating a shared understanding of a common goal evolved through our realization that knowledge sharing was one of the enabling factors facilitating OOPS' early success. As a self-selected group, such a shared understanding did not seem difficult to establish. Those who did not agree with the goal would not have stayed and those who volunteered were the ones who had already bought into OOPS' mission. Therefore, during the formation stage, the key question is not necessarily how the shared understanding was negotiated but how the concept was disseminated. Technology played a large part: the web site (for example, see Figure 1), the discussion forum, the mass media coverage, and the face-to-face gatherings. Attention should be given to how my participants got to know about OOPS: Arnold visited an online forum that posted the information about OOPS, Jessie received a forwarded email from a friend, as did I. Firestorm ran into OOPS while searching on the Internet, and Doris read a magazine article. Technology helped disseminate the vision and concept. Luc's efforts to use mass

media, in addition to the Internet, and the expensive face-to-face gatherings, also proved to be keys to the early success.

Another dimension of value centers at the personal level: Can I do what I want easily and get what I want” (Preece & Maloney-Krichmar, 2002)? OOPS’ micro stories addressed much of the satisfaction gained through self learning and participation. These personally-relevant values in turn helped reinforce the OOPS community’s value of sharing knowledge and building communities.

Aside from “people” and “values,” “events” also played a catalytic role in knowledge sharing and community building. People might appreciate the value of the project and the community, but I argue that it was certain triggering events that maintained the social interactions of the community. Like Doris said, volunteer work largely remained a solitary endeavor, something echoed by Filestorm’s “sole hero” remark. In a strange way, I argue that many of the heated debates, which at first glance were tensions in the community, actually created reasons for people to continue their involvement and even strengthened their vision and renewed their commitment. It was obvious that the face-to-face gatherings helped create the sense of community by putting a real face to the online screen name. However, I argue that it was the on-going discussions about quality, about CORE-OOPS, about where to “find” the learning materials, that created “reasons” for people to continue to debate, share, revise their beliefs, expand their understanding, reinforce their commitment, and critically question the issues. In this sense, I argue that these tensions were actually productive frictions (Hagel III & Brown, 2005). These shared events not only provided a reason for interaction, the shared emotion through participation also challenged the value of the

OOPS community and the value each individual held. In the interactive process, people, values and events shaped and were shaped by each other.

*Myth #2: OOPS is only an Online Community*

Yes and no. The geographical distribution of volunteers made OOPS an online community. However, face-to-face gatherings and mass media dissemination provided two alternative methods of communication, in addition to the traditional view of web-only messages. Television interviews and newspaper reports played an important role in OOPS' early and continued growth. The gatherings, complemented by their online threads, reinforced the formation of OOPS in its early stage. In other words, OOPS did not rely solely on the Internet as a connection medium, even though the Internet played a significant role in the process. The blended approach to building an online community taught us that an online community needs its offline components, an often-overlooked factor in community building.

Productive Frictions

I argued before that the tensions observed in OOPS could actually foster collective problem solving. Like Hagel and Brown said, "when people with diverse backgrounds, experiences, and skill sets engage with each other on real problems, the exchange usually generates friction – that is, misunderstandings and arguments – before resolution and learning occur" (Hagel and Brown, 2005, p.100). The kind of learning created in this sense was socially constructed in that it revolved around organizational issues. We now turn to these issues.



*Incremental Development of Knowledge*

OOPS claimed to follow the open source spirit and embraced itself as an open-source like community. Similarly, OOPS was often compared to Wikipedia as an innovative and evolving phenomenon. I remember on the bus back to our hotel at the Utah conference, I sat next to someone who full-heartedly supported OOPS. Our conversation quickly turned to how many similarities OOPS shared with Wikipedia. I, too, often thought about the comparison. “Do people question Wikipedia’s quality?” I asked. “Of course,” the gentleman replied but continued to stress that Wikipedia is proving themselves gradually. “How about OOPS? How can OOPS prove ourselves?” I asked again. It will take some time, just like Wikipedia, the gentleman commented. In reality, how similar was OOPS to Wikipedia and to the open source model?

Except for the actual wiki platform, OOPS did resemble many of the characteristics of a Wikipedia-like project. OOPS’ open-door policy to its volunteers enabled everyone and anyone to participate; OOPS embraced the notion of a never-finished product; OOPS encouraged public participation in finding errors. However, there also existed many differences between Wikipedia and OOPS. For one, OOPS still followed the traditional path of a pre-publication review. It should be kept in mind that OOPS suffered from editor shortage, which even further delayed the publication of translation. In this regard, OOPS seemed more similar to the shut-down Nupedia.com project than to Wikipedia. Even though OOPS insisted on a pre-publication review while Wikipedia embraced the post-publication review, both suffered tremendous criticism about their content quality. OOPS and Wikipedia believed that the development of knowledge should be a social and incremental process, a process that can only be

obtained through constant revision, collective bug fixing, and one-step at a time. This belief I found to be very similar to the open source model of “release early, release often.” However, why has the open source model often been regarded as successful while OOPS and Wikipedia were considered to be inferior?

I think several interwoven factors set the open source model apart from OOPS and Wikipedia. Open source positions itself to be an on-going experiment in writing better code through incremental improvement. In that process, user-programmers are both the consumers as well as the producers of the programming codes. To say it differently, open source is the collaboration between producers and consumers to incrementally create better software. In this regard, open source is not an “end” product but a work-in-progress. For those who cannot or do not want to contribute to the code, then they have the choice to buy commercial products, without getting involved in the creation of the software.

OOPS, like Wikipedia and open source, also embraced the idea of a “never finished product,” a belief understood as well as criticized by many. Nevertheless, it is legitimate for open source product to be known as a work-in-progress, but it is not acceptable for a reference source to be in a state of less quality. A reference source needs to be credible and accurate. When I reference the dictionary, I do not question the correctness of what I read. Why? Because I trust my dictionary as a credible reference source. In OOPS, we seemed to ask the users to be both the consumers of the content as well as the proofreaders of its accuracy. Two problems have occurred. First, can a “reference source” be a work-in-progress? Second, can OOPS’ readers, many of whom

need the translation to understand the content, help improve translation quality? These two questions forced me to reexamine the notion of the social construction of knowledge.

I used to believe that a wiki is the best computer-mediated example of the social construction of knowledge where everyone can raise their opinion and what was displayed was the collective results of meaning making. The question is, at what point can these “collective results” be considered a credible source? From Doris’ example, we learned that editing could at times make a piece of work even worse, something echoed by McHenry’s study (McHenry, 2004). I continued going back to the notion that quality should be judged “by its worse entries rather than its best” (Orlowski, 2005). If so, why does the notion of social construction of knowledge not seem to work in favor in OOPS or Wikipedia but in open source? I learned from open source that the self selection process to participate is really the process of elimination: only the best codes survive. Open source relies on technical rationality as the gatekeeper for quality. In this regard, I have much faith in OOPS since it is more similar to the open source model than the Wikipedia. Even though “everyone” can participate in all projects, only the “qualified ones” through self selection actually participate.

Because only the ones who “can” will participate, an obvious revelation came to me: social construction of knowledge only applies to those who participate in the construction. An example of this idea would be the many online helpful postings and the debate about translation terms in OOPS. As a reader and occasional participant in those threads, I gained much understanding and perspective about English, Chinese, and OOPS. We also saw from Doris and Jessie how they learned through those interactions. The problem lies when the product of our knowledge construction, in this case, the

translation, becomes the end product which a learner consumes. The learner was not part of the social construction of knowledge for which the product was created. Such experience asymmetry created an apparent divide between the original creator and the consumer.

From this understanding, I realized that there were two distinct groups of people, those who produce (and maybe consume) and those who only consume. Knowledge could be gained through creation as well as consumption, and sometimes creation and consumption are two different groups. Quality, therefore, is the major concern of the consumption group, the learners in OOPS' case. Put differently, Linux' Law - with enough eyeballs, all bugs are shallow - only refers to the eyeballs of those who "can." This is how open source differs from OOPS. In open-source, the producer is also the consumer. In OOPS, the consumers might largely be the ones who cannot read original English, who therefore need the translations. An apparent paradox seemed to exist in OOPS. On one hand, we believed in the importance of translation. In part, language barriers should not be the road blocks to access knowledge. In part, many people did not have the language proficiency to study in English. If this assumption was valid, then how can we expect the same group of people to help spot the translation mistakes? The idea of "with enough eyeballs, all bugs are shallow" works in open source but might be more difficult to realize in OOPS. However, what we could do in OOPS was to engage the learners in terms of their construction of knowledge, demanding the creation of a learning community around each course or content area, as Arnold had pointed out. This, however, was something in which OOPS lagged behind, and the lack of leadership in that area demanded our attention next.

Today, we questioned OOPS and Wikipedia because we can and because OOPS and Wikipedia's transparent process was for there everyone to see. Technology enabled the creation of projects such as OOPS with the mobilization of many international volunteers; technology also brought many critical eyes into the process. However, how did we solve the perceived reputation issue? Will an academic involvement be the solution, as Arnold had suggested?

### *Leadership and Decision-Making*

Luc as the sole leader was charismatic, ambitious, thoughtful, and strategic. He had the right combination of money, fame, and ability to found OOPS. He continued to maintain his strong presence online and throughout all OOPS activities. He could be both playful and critical online and in person. Luc created OOPS' vision, maintained energy throughout, and continued to forge forward with the project. However, as the over-stretched sole leader, Luc also inevitably became part of the problem in certain cases. A point to consider would be the incident where a translator had some major communication breakdown with the administrator. Unfortunately, this incident was just the tip of an iceberg. Luc had always blamed the loss of emails as the primary cause of communication breakdown. However, in our IM chat, he did admit that OOPS needed a full-time system engineer. In Linux's example, technology functioned as the facilitator for a more robust system. OOPS needed a similar system for volunteers and administrators to interact without the worry about losing emails. These breakdowns were one of the reasons why Arnold preferred a more organized approach to this project.

It may not be fair to point a finger at Luc for this matter as I knew he had tried to hire several engineers. For one reason or another, none of them stayed long enough to

help create such a system. Without the help of a communication system in the production process, Luc painfully became the bottleneck. He certainly got my personal sympathy when he said he usually had to reply to several hundred emails a day. However, as OOPS' leader, his over-work did not justify the lack of a better communication system. His over-work also led to his seeming detachment and necessary ducking of issues, which appeared evident in his conversation with me. One such issue brought up by Doris concerned sustaining volunteers.

Based on the steady increase of volunteers, we could consider OOPS as being quite successful. However, success creates dilemmas of all kinds for organizations. First, do more volunteers mean better quality work? Doris made this argument pointedly. She used the metaphor of the pre and post sale to illustrate her claim that "Will the quality produced by 5,000 volunteers be better than 1,500? Not necessarily." In Doris' view, Luc might have spent too much time getting more people "on the bus," but not necessarily the "right" people to contribute to the project or to keep them committed. Indeed, OOPS continued to suffer volunteer drop-out. Doris pondered how OOPS should cater to the needs of already-recruited members and sustain them for the long run. I agreed that OOPS did not do enough, if anything, to maintain the precious human resources it had so costly recruited. I also wondered why Luc did not spend more time creating a stronger volunteer community. Through online postings and conversations with Doris, I realized that many volunteers wanted to interact with others in similar disciplines; some like to know who lived in the same region. OOPS needed to create channels for volunteers to interact both inside and outside of OOPS, to foster the creation of individual knowledge

communities, and to encourage individual narrative authority. This, as I believed, was a long-standing challenge that would have long-term implications on OOPS' sustainability.

In addition to the lack of attention paid to the large pool of existing volunteers, Arnold also rightfully pointed out that OOPS cannot hold our volunteers accountable. As a result, volunteers drop out constantly. Since we cannot hold our volunteers accountable, we continued to recruit more. As the number of volunteers increased, the production system experienced stress. One is reminded of Brook's law: in a complex problem, adding more people only addresses the issue of quantity but not quality. This is like "too many cooks spoil the broth." Human communication about complex tasks and goals is often imperfect. It gets more imperfect at an increasing rate when such a communication must either travel through large numbers of people, or in OOPS' case, travel through Luc. The success of OOPS cannot simply depend on getting more people, or even the "right" people. It also critically depends on how these people are organized and communicated with, an issue that concerned Arnold. However, OOPS did not implement such a system to facilitate better coordination and communication. In this case, when technology could not come to the rescue, Luc became the bottleneck, for which Luc had never apologized. When the number of volunteers increased, OOPS needed a scaleable production system to accommodate such a growth. When OOPS failed to achieve both accountability and scalability, it was possible that OOPS would suffer what Arnold warned would be "a fatal blow."

The third issue related to leadership came when Arnold explicitly questioned if OOPS had over extended itself and lost sight of its original goal. Both Arnold and Doris questioned Luc's leadership, even though they were concerned about two different yet

intertwined issues. Note that Arnold had kept his eyes on a larger goal of an online learning platform and online learning communities. Also noteworthy is the fact that Arnold thought the over-commercialization of OOPS spoiled the “clean” educational goals OOPS should uphold. It was hard to judge if OOPS had over extended itself purely based on the number of volunteers. However, I felt the same when seeing Luc going at so many different directions, all without making it clear to the community where he was taking us. I remember during my early contact with Luc, he did not even believe OOPS was about education. In his view, OOPS was about sharing knowledge. I kept going back to that earlier exchange and pondered if his view about education, learning, and knowledge might have colored his vision of the future OOPS. OCW positioned itself as a publication innovation. In this sense, it was concerned about providing high quality content. As a receiver of that content, OOPS should really try to make this content more useful and meaningful for the Chinese population. Translation was only the first step. I think there was an urgent need to foster learning communities where learners can interact with others in our mother tongue on certain courses or disciplines. I did not see any efforts in that direction, which also worried Arnold.

The last issue about leadership concerned Luc’s decision-making practice. I have tried to ask him how he made decisions, but he never offered me a clear answer. Like the open source model, maybe OOPS will eventually evolve into a more mature organization with a clearer governance, reporting, and decision-making process. Luc never even tried to make his decision-making process transparent to the community, a must in my opinion, in an open community. I once confronted him with this issue and he, in a almost yelling tone, argued that why he did not need to reveal everything to the public just like a



company did not need to open its accounting books for viewing. I sensed Luc's vulnerability in that conversation and realized how much we demanded our leader. To open everything could be threatening, and Luc understandably ducked this issue. As OOPS became more mature, I think the community will demand a more transparent decision-making process, which ideally should involve more people than just Luc. For the time being, like Doris said, Luc will see problems as they arise.

However, what would this decision-making process eventually resemble? I was surprised to learn that open source actually functions within a pyramidal structure, in which each gatekeeper sits at a different level, and a decision on including a new piece of code travels up through each gatekeeper and eventually reaches Trovalds, who sits atop. This pyramidal decision-making and governance structure evolved and was established out of the necessity of maintaining the community growth. In the OOPS project, leadership played a critical early role in getting the project started, setting an initial focal point, and maintaining coordination. Luc translated the initial MIT OCW web site, and he continued to be heavily involved in all aspects of OOPS, including moderating online discussions and editing translation work. As a leader, Luc clearly set an example of a doer-leader: a leader who also did the work. His frequent postings revealed him to be a self-deprecating wit. However, he probably was running the risk of failing his followers if he continued to be non-responsive to those who led in some capacity. I would like to see OOPS develop something similar to a pyramidal structure in its next development phase. Based on the experience of Linux, a governance structure is still required in decision-making and responsibility sharing, something lacking in OOPS. Such a

structure, close to what Arnold would prefer, however, can only be created when the community demands it.

Filestorm provided an excellent example of a step in such a direction. His initiation of a face-to-face transcribing team was born out of his free will but also his sense of an unsatisfying working condition. He did not want to be the “lone hero,” and he saw ways to improve the current practice. He organized a team of students in his university to help him realize what he could not accomplish by himself alone. Filestorm and his team set the example of how an emerged leader and his followers could complement the larger OOPS project. Similarly, when I started the transcribing project, I took the initiative and leadership to take charge in that aspect of the project. I saw value in transcribing the video lectures, and no one else was doing it at the time. Within the open environment, I was empowered to do what I saw fit. So did Filestorm. Leaders did emerge in OOPS as opportunities presented themselves. Luc as the overall leader supported our endeavors.

One important success factor of open source is the voluntary participation and voluntary selection of task. In addition, the labor is distributed, and the barrier to entry is low. In this regard, OOPS resembled an open-source model. Decentralized voluntary cooperation, as witnessed in OOPS, was always an interesting human affair. The situation certainly became more interesting when it involved highly motivated and well educated individuals who obviously had the options to depart any particular cooperation arrangement. In this regard, in a volunteer-based project such as OOPS, the leader is the one with the least power: a leader would not be a leader if he or she has no followers. Paradoxically, we look toward our leader for leadership but at the same time, we, the

people, could really step up and demand changes. One important enabling factor to encourage emerged leadership was OOPS' loosely-coupled organizational structure.

### *Loosely-Coupled Community Structure*

OOPS could not grow from two people to a community of over 1,700 volunteers if administrators micro-managed everything, which would be costly. One must keep in mind OOPS' workflow. Volunteers selected a task that they believed they could accomplish, based on individual interest and skills. Tasks were divided at a per-course level at the current stage that allowed the modular approach. The only "rule" was to translate level-one and then proceed to level-two. How volunteers go about translating and in what sequence they like to translate within each level was entirely up to the individual. In other words, OOPS operated in a loosely-coupled structure in the sense of a modular approach (Hagel and Brown, 2005). Instead of giving specific details in each activity, loose coupling emphasizes "designating relatively independent modules of activity with clear 'owners' that are accountable for the performance of each module" (Hagel III & Brown, 2005, p. 84). I see that loose coupling contrasts with a traditional hierarchical approach which involves detailed and specific sequences and activities with fixed, mostly quantifiable results. However, loose coupling does not mean a lax organization but a rather modular approach.

First, a loosely-coupled community grows more easily. The open-door policy and the online sign-up form encouraged the influx of volunteers. Imagine if OOPS had to screen for qualifications; this screening would have created a bottleneck for recruitment. Imagine again that if a volunteer had to wait to be assigned a suitable task, a step that could also create a bottleneck. Additional resources would have to be allocated to assign

tasks, and any extra waiting time for the volunteer might even cause attrition. When a community can scale relatively easily, the community then can accommodate more specialized participants, which is the second advantage of a loosely-coupled organization. OOPS, therefore, was able to attract volunteers across all educational levels and disciplines. As a result of the large pool of specialized volunteers OOPS was very productive. Luc admitted this early decision about open-door policy was not due to his great foresight. Regardless, we did witness the fast growth of OOPS and its talented volunteers as a result of it.

In addition, loose coupling provided the autonomy and practice each of the volunteers liked to keep. Without micro-managing the detailed steps to finish a translation, volunteers can creatively accomplish the task in ways that worked for them, drawing from multiple resources. We learned from Doris how such autonomy also empowered her to venture out to other tasks with increased responsibilities. From the management perspective, there was less need to coordinate among the translators who mostly work independently. Furthermore, one of the most important aspects of loose coupling is its flexibility. Because of OOPS' modular approach, if one volunteer quit, the project continued, and no other resource was tied up because of it. OOPS opened up the course for adoption and another volunteer adopted it and continued the work. Such a "relay" mechanism, a term coined by Luc, was only possible in a loosely-coupled system and might be one of the key elements for long-term sustainability.

To further maximize the current plug-and-play "relay" system, OOPS could break down each module to even smaller pieces, an idea proposed by Luc. This way, volunteers can adopt an even smaller unit, which might give them a better chance to successfully

complete it. This proposal, however, required a technical infrastructure to facilitate the organization and communication. On the other hand, to be successful in this plug-and-play scenario, it was necessary also to stress the system in multiplied complexity of communication and coordination. At the end, however, I continued to believe that OOPS needed to evolve into its own governance structure that was both hieratical and loosely-coupled, a combination of what Arnold wanted and what Luc preferred. This way, leadership was distributed, decision-making was local and coordination was positively reinforced by technology. By breaking down tasks to smaller chunks, in Luc's view, success might be obtained, and therefore support sustainability of the volunteers and the community.

It was clear, however, that the view about the advantages of a loose coupling entity such as OOPS was not shared by Arnold even though heavily endorsed by Luc. Maybe like Arnold said, people from Taiwan and China shared different historical, cultural and political backgrounds; we saw things differently. More than once, I openly shared my support of a more loosely-coupled system online. Drawing from my past volunteer experience, I confessed my confidence in such an organization.

However, a loosely-coupled organization suffers drawbacks as well. This concept might work well in the business world when competition is fierce. As an entity in the food chain, if you do not perform to the consumer's expectation, whether it is delay of delivery or delivery of a questionable quality product, you will be eliminated from the process. This was what Arnold called the "accountability" problem in that OOPS cannot hold its volunteers accountable. In a loosely-coupled process, how each entity accomplishes its mission is autonomous. However, there needs to be a standard for

outcomes to encourage the good and eliminate the “laggards.” Open source solves this problem by its technical rationality approach: let the code speak for you. Only the best codes, recognized by the community, survive. I, however, continued to ponder about accountability and loosely-coupled structure. Can they co-exist? It appeared that a loose-coupled OOPS enjoyed quantity growth but not necessary quality assurance.

*Myth #3: OOPS Can Self-Heal and Self-Organize*

Not entirely true. When a group of highly specialized people come together, frictions are unavoidable. The notion of a self-healing, self-organized organic community represents the belief that orders will arise out of interactions among individuals. I cannot say if this is a character of the Chinese culture. However, according to my observations, “individuals” rarely interfered with administrative-related business. I can only guess that people regarded those issues as being “Luc’s issues,” and refrained from being involved. Luc’s strong presence in the online forum and his role of the moderator of the forum certainly set him up as the leader of the project. Personally, I was the coordinator of a wiki-based transcription project. Based on my 18-month experiment with this project, there had been vandalism that never self healed. One time I was away for a conference and was out of touch with a computer for a week. Upon returning, I saw that someone left a comment on a page indicating that the site needed some “gate keeping” chores. I could only chuckle and wonder why this person decided to leave a message instead of fixing the problem, a task he or she could rightfully perform. I could only guess that my established authority on the site prevented this person from doing so. Perhaps in addition to the power issue, for a community to transform, it needed to have a certain number of members to make any transformation possible. Luc once said he was playing with the

game of numbers. For an organic community to rise up to the occasion, at times we only needed one strong soul, but at other times, we needed a large number of supporters.

Regardless, leadership was important, as well as emerging leaders.

### *Usefulness and Intellectual Property*

An interesting challenge rose out of OOPS regarding the usefulness of OCW materials. Little was known about how learning took place in the movement of OCW, how these users experienced learning, and what kind of support they needed for a meaningful self learning experience. The readings of the online forum and the discussion with my participants told me that there were two main complaints concerning the usefulness of the materials: the lack of depth in course contents and the lack of access to referenced materials such as textbooks or journal articles. Earlier I conducted a separate study to examine the trends and issues brought up in the online forum (Lin, 2005). That study showed that 10.35 percent of postings on the OOPS online forum were in the category of “I cannot find materials.”

My conversation with Arnold is relevant in regard to this issue. We both questioned how learners can benefit from Powerpoint slides, which were mainly produced to complement a live lecture. I learned much from my own translation experience. However, I had prior knowledge in that content area, and the materials were mainly for review rather than new learning. Can we expect the same from all learners? In addition, what could be made available in the OCW collection was limited to three factors: what the professors were willing to provide, what could be digitized, and what could be shared without the violation of copyright. As a result, the OCW collection in some cases might lack the “actual” course contents, in spite of the wide range of

disciplines covered by the collection. MIT called many of these “skeleton” courses “thin-courses.” What “depth” must course material include in order to be deemed meaningful to others? I know MIT initially developed OCW mainly to inspire and motivate worldwide faculty to develop their own teaching based on MIT curriculum. I had no doubt that MIT’s (and many others’) materials were very helpful for a faculty member. As a matter of fact, I know I will consult this pool of materials when I began my career as a junior faculty member, since I truly appreciate this collection of open materials. However, for OOPS’ self learners, the thin-course seemed to present more of a challenge rather than an inspiration.

Arnold rightfully pointed out that the learning style differences between east and west might be one of the reasons Chinese learners had trouble with self learning. I cannot disagree. When we “import” the learning materials from the west, we inevitably also “import” the ways of teaching and learning peculiar to the west. Localization, therefore, was not only a question of language but also one of culture. According to the most recent OOPS survey, out of 788 survey respondents, only 65 were teachers. Of those 65, only 19 were OOPS volunteers. This survey data told me that OOPS did not have many volunteers who were also the teachers, who would potentially teach the subject. Take myself for example - I certainly did not and will not teach the two courses I translated. When OOPS translators were not necessarily instructors, it was possible that we did not have the pedagogical background necessary to localize new content effectively. Therefore, I asked, how can OOPS help the self learners?

This question brought me back to what Arnold said about establishing an online learning platform, an online learning community. To make learning meaningful, I think



the formation of learner communities would be essential. This, in turn, will make OOPS' localization effort useful. Usefulness, therefore, lies in the users' adoption of the materials, which needs to be facilitated through collective problem solving and knowledge construction. Self learners are actually comprised of two groups: the volunteers and the pure learners. From the narratives presented earlier, we know volunteer translators' learning satisfaction came in various forms. There was no doubt that, through active participation in the translation process, volunteer translators gained much knowledge and learning. The main concern of the thin-course phenomenon centered on the "pure learners" who relied on translation in order to study. It was clear that the second group needed much support than the first group, the kind of support that was different from what a volunteer might need, and the support not quite yet available in OOPS.

The second access issue concerned the accessibility to referenced materials. OCW usually provided a list of reading materials drawing from book chapters and journal articles. When these materials were copyright-free, they were included in OCW in full text. More than often, however, these materials were copyrighted and therefore cannot be distributed as part of the OCW. This seemingly "MIT" problem, inherited by OOPS, as Luc pointed out, pertained to a larger issue about educational openness and sharing of creative ideas and research. In many cases, the Copyright and Intellectual Property restrictions dictate the accessibility of the materials. Copyright worries include the right of the owner to restrict access by others whereas open licensing promotes the right for maximum distribution. For example, the particular version of the Creative Commons license (non-commercial, share-alike, and attribution) was adopted by MIT and

consequently by OOPS. Just like the open source software, the principal goal was to maximize the ongoing use, growth, development, and distribution of OCW. Such a licensing scheme shifted the fundamental focus of intellectual property rights away from protecting the privilege of an author toward protecting the privilege of users. The Creative Commons (Garlick, 2005) movement also advocates the shift of paradigm from “all rights reserved” to “some rights reserved.” This license scheme encourages organizations such as OOPS to re-distribute the content in another language. However, many of the textbook and journal publishers have not yet caught up with this new thinking. Many OOPS users were upset or even angry when they realized that OOPS cannot provide more than what OCW can provide. Access to these materials seemed difficult, if not costly, especially to the learners from China.

OOPS encouraged translators to add footnotes or other local materials that were open access. I know from my own experience that such footnote could be important in bridging the concepts from the west. From my conversation with Arnold, I know he also diligently added his footnotes to help solve the problem of linking the knowledge to the Chinese context. Doris in her own translation and even her editing also tirelessly included her own notes to help connect and convey the ideas. This could be a small yet important step in helping the learners in digesting the materials.

Another possible solution to this problem, in the larger context, is Open Access (OA) (Brody, 2001). Research has shown that articles which are made available online free of charge receive more citations than the copyrighted ones. This means the OA not only benefits the readers but also the authors of the materials by increasing their accessibility. If more referenced materials in the OCW collection are openly accessible,

self-learners can then have access to them online. Nevertheless, I understand that it would be unreasonable to request OCW producers such as MIT professors to use only OA materials in their courses. MIT professors' foremost responsibilities involve serving their students, who can easily gain access to the course materials. Therefore, I believe what OOPS did: encouraging translators to add local-relevant content, became even more important in our localization effort. Furthermore, until OA is widely accepted in academia and in more journals in the Institute for Scientific Information (ISI) index, faculty members seeking tenure promotions may not choose OA as a publication outlet, thus resulting in limited content in OA. I can only hope that when a larger percentage of academia embraces open access as equally rigorous and significantly more valuable to the research and learning community, more educational materials will be accessible via the open web.

Another possible solution to the thin-course phenomenon might be to make more video lectures available, as proposed by Arnold. MIT OCW's 2005 evaluation report stated that 21 percent of the users cited lecture videos as most valuable in achieving their goals for site access (MIT, 2005). I was aware of the many reasons why video and audio cannot be the key elements of OCW. Viewing video lectures demands high bandwidth, which limits the accessibility of the materials. Such limitation can hinder the OCW's aim to make materials as accessible as possible. In addition, video production and storage can be costly. Even with these concerns, however, video lectures seemed to be able to provide an alternative solution to the issue related to accessing materials. As technology further develops, the issue of bandwidth and cost might be gradually reduced. Given the current copyright restriction, producing more video lectures might be a partial solution.

This thinking also confirmed my reason for initiating the video transcribing project. To make the videos more useful, one small step was to create the English subtitles, which will later be translated to other languages. The subtitles will make the high-demand videos even more accessible to OOPS' learners.

The issue about intellectual property played out, in an unexpected way, in OOPS' development in the project's financial survival. When OOPS began to celebrate its second birthday, a looming worry grew. An extension "will OOPS survive" out of the CORE shadow spurred the even more urgent question about OOPS' financial funding sources. Up to this point, Luc had personally financed all operation expenses. Yet, he began to confess publicly that the money will run out by the end of 2006. In the past year, Luc had received two awards for his OOPS volunteer work. Both awards came with money, which Luc donated directly back to OOPS. I had helped with two grant proposals to two major international funding agencies. Money was important. No matter what, somebody will have to pay for OOPS, which badly needed some full-time and part-time editors and system engineers. Somebody will have to pay for the t-shirts and souvenirs. Somebody will have to pay for all the gatherings. Somebody, maybe one day, will have to pay Luc.

Several times, the issue about using web site advertisement as revenue sources came up in online discussion. From the beginning, Luc had been persistent in his response: we cannot make money due to the regulation of the Creative Commons license. It must be kept in mind that the license OOPS adopted inhibited any profit-making in this process. Unlike the open source software, the non-commercial clause made it clear that no one could make any profit out of OCW. From MIT's perspective, they certainly did

not want to see people turn their generosity into some form of degree-granting, money-making, for-profit business. The non-commercial clause existed for some very sound reasons. However, the appropriateness of this non-commercial clause was not necessarily shared by all. For example, Rice University also has an OER project called the Connexions (CNX) as a publishing platform for electronic textbooks. CNX, explicitly adopted a different version of the CC license, allowing commercial adaptation of their materials. In their view, packaging a book out of the CNX materials and selling it for profit is one way to ensure that CNX materials make the broadest possible impact on the world. Of course all contributing authors will receive their attributions.

Such a business model is not new. Red Hat Linux makes its success by selling packaged Linux software and offering customer support. Thousands of Linux programmers know full well that companies like Red Hat are in the business of selling their work for a profit. In such a business model, the programmers receive their name recognition, something that motivates them to continue to contribute their creativity and time. In return, Red Hat funds the salaries of several top-tier Linux developers, as their way to give back to the community and maintain a “synergistic relationship with the open source community.” To me, this seems to be a win-win solution, one that cannot be obtained due to the CC non-commercial constraints.

It is difficult to see how such a successful “business” model could be realized in OCW in general and in OOPS in particular. I remember that Arnold was strongly opposed to the idea of getting money involved as it would not be “clean.” However, OOPS needed a “sustainable” model that would allow us to seek out sponsorship from even for-profit organizations. Going back to the proposal of putting commercial

advertisements on OOPS website: This was not allowed under the non-commercial clause. Personally, I began seriously doubting the real benefits of such a limitation. If the goal of OCW was to maximize its impacts on as many people as possible, then something like OOPS needed to stay active and thrive instead of going out of “business.” In order to “stay in business,” we needed money. We certainly did not need to go as far as commercializing OCW. But how about just the simple sponsors from for-profit organizations? I began to wonder if this clause could impose much more limitations in certain instances than it had originally intended.

## CLOSING REFLECTIONS

As is typical of almost any undertaking of a pioneering nature - a project that explores still-emerging human knowledge, technology, world views, and, hence, complex human interactions - this dissertation could not have been completed without the support and encouragement of many special people whom I recognized in the acknowledgement section. As I come to the end of this leg of my research journey, I remember what worried me the most at the beginning was if and how I could establish an online relationship with my participants. I was concerned about whether I would be able to get anything out of this research due to our communication over the Internet. Moreover, since I employed narrative inquiry as my research methodology, a methodology that centers on human experience as the philosophical underpinning and highlights a trusting and close researcher-participant relationship, I concerned how we would be able to communicate. At the beginning, I tried various strategies to sustain our distant relationships. I tried to organize the messages differently. Sometimes I used a bullet point list; sometimes I used sequenced numbers to suggest conversation continuity. I experimented with different timing of reply messages. Sometimes I replied right away; sometimes I intentionally engaged in “wait time” by replying later. I also played with various lengths for my message to see if a longer message would solicit a longer response. In the end, what surprised me the most was that relationships were built and experiences were shared.

It turned out that the online place is just not as mysterious as I previously imagined. Granted that many community members chose to hide behind the Internet, there were nevertheless many who did reveal their personalities, personal stories, and

joined the online conversations. At least within the context of this research, I felt I did get to know my participants. Of course the researcher-participant relationship was also a self-selection process in that I invited my participants to be part of this research, but they had the option of deciding how much they would like to be involved. As a result, some relationships were stronger than others. In addition, I realized that online identity is not such a mysterious thing as I had previously imagined, either. There were many anonymous members whose true identity we may never know. However, through methods such as self disclosure, self referencing, referencing to each other, I felt I had many means to triangulate my participants' identity. In this online place, there were dramas, personalities, arguments, encouragements, rivals and friendships, just like one would have encountered in the face-to-face world. In the end, what surprised me the most was how much I learned from my participants and many other community members.

The chapter dealing with Micro-stories and Macro-stories detailed my analysis of the narratives of my participants as well as others in the community. Reflecting on those analyses, I came to the understanding of five ways to sustain the OOPS project. First, I realized that "learning in situ" or "learning by doing" provides potential reasons of a prolonged engagement. Secondly, to sustain OOPS means to strengthen the knowledge community relationships and cultivate individuals' commitment to greater responsibilities. In addition, to sustain the project means to support the community members by providing effective ways to organize and communicate, by providing a technical solution to better searching and evaluating the materials, by fostering emerged leaders for greater distributed sharing of responsibility, by encouraging learning communities that focus on



specific content area, by making free learning materials more readily meaningful to the Chinese learners, and by offering our own Chinese free knowledge back to the World.

#### Increased Responsibility and Commitment

The biggest gaps between the current literature on knowledge communities and my work fall within the areas of online safeness, time of engagement, participant identity, and motivation for engagement. From this inquiry, I sensed that the experience asymmetry among many members caused tensions. Tensions, in turn, created the motivation for engagement: to express, debate, clarify, and create new knowledge. As I have argued previously, the period of engagement and participant identity could be conceptualized as less of an issue if we consider the archived conversations as a sign of “time,” and that the online persona represents what members have access to. Furthermore, safety is an individual feeling that cannot be labeled with a fixed criteria or property. Therefore, I believe that the larger OOPS community, mainly represented by the online forum, can be recognized as a knowledge community, if an individual feels he or she has gained much new knowledge through their participation - regardless the fluidity of the members or the safeness of the conversation - and if they know the members involved. By conceptualizing the OOPS forum as a potential place for a knowledge community, I then had access to more sources of information regarding my participants’ knowledge community activities. In this regard, the larger OOPS knowledge community created a landscape where individual knowledge communities could reside.

In addition to the above-mentioned gaps in the current knowledge community literature, when I conceptualize the OOPS forum as a potential place for a knowledge community, I introduce yet another expansion of the knowledge community literature.

We see how individuals moved back and forth between different knowledge communities and how they shifted the boundary to include a wider variety of people. However, the current knowledge community literature overlooks an important phenomenon observed in this inquiry: how my participants ventured out to other tasks characterized by increased complexity and involvement in the project. I will elaborate the last point next.

Recall that Doris asserted that if a person was not an OOPS volunteer, that person could have a full understanding of how OOPS operated. I think being part of the community meant becoming a volunteer in Doris' view. Being a volunteer granted that person the legitimacy of criticizing OOPS. In this notion, legitimacy equals membership, which also indirectly implies identifying with the community. As the narrative demonstrated, all participants started out taking on one single task. As they became more engaged, they undertook other tasks of greater complexity and increased their involvement with the project. The movement from peripheral to more engaged, I believe, answers the question of long-term sustainability of each individual volunteer.

Again, Doris may be taken as an example. We saw how she moved from contributing as a translator to working as an editor. In the process of editing, she became aware of the issue of quality. As Doris and I became friends, she increasingly evolved and "grew" in relation to the online discussion. She wondered if my presence motivated her to transform from the "silent group" to the "outspoken group," as she more frequently joined the online debate and openly offered her point of view. As Doris became more engaged, she undoubtedly developed a stronger sense of community and belonging. The professionalism she demonstrated when her own translation was under scrutiny only confirmed her devotion to the volunteer service. Her willingness to correct mistakes she

had voluntarily spotted online moved her further into the OOPS service work. From Doris' narrative, we saw how she had developed and how her role had changed in the social landscape. We can also recognize that she formed a strong sense of identify as a member of the community, for what she did and worried about directly related to the betterment of OOPS. Our relationship in our knowledge community also helped strengthen Doris' engagement. Similarly, Jessie had also made her own personal extension from a translator to an editor, to an online translation guru by participating in almost each and every one of the translation-related discussions. Jessie even recruited her teenaged daughter to join the transcription project.

Arnold took a different route. He was first an OOPS volunteer and then became a CORE volunteer. He demonstrated his service extension by producing an analysis report about CORE and OOPS. Arnold moved from OOPS to CORE and even had the thought of officially joining CORE. Even so, he never "left" OOPS. He continued to be part of both organizations and maintained his presence in both online discussion forums. It is significant to recall the story about Arnold' delayed course. Through that experience, Arnold continued to ponder about the organizational issues he believed had weakened OOPS. To take a step back, however, Arnold's involvement with OOPS and CORE centered on his long-term dream of a more sophisticated online education. What OOPS and CORE were striving for had personal relevance. Even with his strong support of CORE and his persistent worry about OOPS, Arnold remained clear in his own vision regarding online education. Arnold admitted that within the big environment of China, many things may not happen. Maybe CORE or OOPS could be the conduit through which he realized his dream. Arnold mentioned that he would like to discuss with Luc the

possible creation of an educational learning platform; he would like to work with CORE to help them better understand the Chinese educational system – what might work, what might not work. Arnold carried on his ideas persistently. I saw Arnold moving with increased complexity and commitment back and forth between CORE and OOPS, China and Taiwan, himself and Luc, and the reality and the dreams, all within the landscape of this social world.

Filestorm took yet another route. Starting from himself as the “lone hero” listening and typing up English subtitles for Linear Algebra video lectures, Filestorm then moved to a leadership position, taking up the more difficult and risky task of organizing a student group on his campus. Filestorm’s extension from self to others was not a straight line. He went through his zeal support to Luc, to his questioning of the efficacy of his role, to his new vision of his responsibility. Like Arnold, Filestorm had kept his clear vision with regard to the importance of education. His clear vision helped him see more transparently the larger role he could play.

Luc as the leader certainly took the road less traveled. He experienced many events that only a leader could experience. He was surprised by the warm response to his call for service; he was annoyed by MIT; he exercised his privilege to delete postings for the sake of maintaining community peace; he learned from his mistakes of not having a full-time system person; he realized that volunteers were like the eyes around the world to help him see differently.... All these experience did not happen in isolation. When OOPS faced the world, many tensions arose. Luc learned to deal with challenges and also learned to position himself as a leader, a janitor and a translator.

My own journey through OOPS also demonstrated my increased commitment and responsibility to this community. I went from a translator to a coordinator of a sub-project. More importantly, I took on the task of the “unofficial” researcher for this community, documenting its growth and disseminating my research to the academic field. My colleagues often teased me that my dissertation work was quite costly as I had to travel to conferences to meet Luc and to share my research. I experienced emotional ups and downs in reaction to different community events. Like all my participants, the sheer joy of learning - learning to be a member of this community, learning to interact and work with people whom I will probably never meet, learning to explore different aspects of the project, and just learning to be part of something bigger than myself - intrigued and “hooked” me.

As Arnold, Doris, Filestorm, Luc, Jessie and I “learned” how to “cope” with the “consequences” of our service, we moved back and forth in different locations of this lived-in social world. I saw that when we moved into different locations, it was a result of a set of relations among people, events and the world, all over a period of time. I considered these moving-back-and-forth cultural practices which were situated within the OOPS landscape as the micro-foundation and the social world as the macro-foundation. According to Lave and Wenger (1991), “Participation in the cultural practice in which any knowledge exists is an epistemological principle of learning” (p.98). I see how Doris learned to defend OOPS by participating in correcting mistakes, how Jessie learned to support OOPS by helping others with translation issues online, how Arnold learned to juxtapose CORE and OOPS by centering on his clear vision, how Filestorm learned to find that “bigger power” as his way of supporting OOPS, and how I learned to take on

this research inquiry as my way of giving back to this community. It was clear that all these learning situations occurred in a social setting and “the social structure of this practice, its power relations, and its conditions for legitimacy define possibilities for learning” (p.98). In my view, all these experiences happened within the OOPS landscape where each individual relied on his or her knowledge communities, large and small, to drive them into prolonged commitment and bigger responsibilities.

In addition, the process of moving toward more engaged participation involved not only greater commitment of time, broader responsibilities, more difficult tasks, intensified efforts, but more notably, an increased sense of self as a master practitioner. None of my participants explicitly indicated the change of self, that is, the change of their role in our interviews. However, examining the track of their moving back and forth within the social world revealed such a change. Change is learning. Moving back and forth is learning. Making personal extension of the service is learning, and all learning is situated in the social world and in the cultural practice. Learning, as described above, which takes place socially in a knowledge community is, as I believe, the key element for OOPS’ sustainability.

*Myth #4: Altruism is in Opposition to Self-interest*

Steven Weber who investigated open source communities argued that the discussion about whether or if altruism is in opposition to self-interest yields unproductive discourse (Weber, 2004). In his view, altruism makes a “dicier proposition” (p.131) in explaining open source developers’ behavior on the Internet, especially taking into account that each particular contribution has always been carefully credited. On the contrary, I cannot recall an incident where “getting the fame” was important to any

OOPS volunteer. Quite the opposite, I could recollect many occasions where “getting the fame” created real-time peer-review pressure on volunteers. The story about Doris and what she said comes to mind, “If my name is on it, then I must be responsible for it.” In this case, this sense of responsibility provided her with the pressure to produce better work. Maybe this is yet another cultural difference, but my observation of OOPSers’ altruism differs from Weber’s observation about that of the open source developer. Nevertheless, the similarity goes to the notion of self-interest. I agree with Weber that altruism alone cannot be the sole driving force behind either open source or OOPS. In addition to the selfless, personal gratification that comes from doing something that helps someone else, included in the terms of the welfare of others should be the self-serving interest of the welfare of self. As a matter of fact, I would even argue that this self-serving interest plays an important role in a volunteer’s endurance in service. A mixed desire to do something good for the welfare of others as well as for self creates a solid foundation for a long-lasting sustainable service.

#### Technology as Partial Solution

To sustain itself, OOPS needed to establish a solid technology infrastructure that can help organize modular tasks, facilitate member communication, and enable more effective ways of locating learning content as well as other members. I learned from this inquiry that these problems were identified by the community members and echoed by Arnold and Doris on different occasions. Nevertheless, a feasible solution had yet to be realized. In my view, these problems could be alleviated, in part, by technology.

The only automated function in OOPS during its early development was the volunteer translator sign-up form. This web form allowed people interested in translation

to adopt the course they chose and, consequently, marked those courses as “taken”. This function prohibited multiple adoption of the same course. Upon completion of this form, a confirmation email would be sent, manually. Sometimes the email provided by volunteers during registration was incorrect. Sometimes certain email systems regarded the email sent by the OOPS system as junk emails. We often read about these problems in the online forum. Regardless, for one reason or another, volunteers often did not receive a confirmation, resulting in their delay in starting the work. Email communication was imperfect and an alternative was in order. In addition, the handling the task manually relied on a person to activate the process, which at times could also result in delay.

As proposed earlier, as a loose-coupled organization, OOPS should consider an even further break-down of the current modules into small pieces, an idea first brought up by Luc. This approach will require a system that allows course adoption at a smaller unit level. For example, often a translator might quit after finishing only level-one translation. As a result, this course was reopened for level-two translation only. Even though the volunteer could go through the web form and sign up for this course, this volunteer still needed to obtain those already translated files from the administrator via email, an additional step in the production process. Furthermore, OOPS needed many other types of volunteers such as editors, programmers, file converters, html editors, and video transcribers. None of these tasks had its sign-up interface. People interested in those tasks needed to contact the administrator and then had to wait for their assignment. This, again, delayed the mobility and efficiency of the community, a situation echoed by Luc. Additionally, there was a two-month time limit on level-one translation. Currently, this process was performed by personnel members manually checking each course’s progress



and sending reminder emails, a process rather labor intense and error-prone. Moreover, when each volunteer turned in their work, it went through an administrator, who would then try to coordinate the task of finding an editor. In Arnold's case, I saw that sometimes the file got lost in between and even the editor disappeared. With the manual monitoring, OOPS had a difficult time keeping up with the demand for a quick turnaround. As can be imagined, in such a complex system, a miscommunication in any single step would further delay the production process. An example that comes to mind was when a volunteer repeatedly turned in his or her work but had never received a confirmation. This person's hard work was never received by the administrator, resulting in his or her receiving an unpleasant email reminder that his or her course was about to be reopened for adoption.

I know from talking to Luc and from the design document Luc had shared with me, that he was fully aware of these situations. Based on conversations with Luc and my participants and drawing from my own observation and experience, I suggested a new system that would allow each volunteer to register for an account and to create a personal profile and space in the community server. In this personal space, the person could enter and modify his or her personal information that might include geographical location, school, major, highest degree, hobbies and any other information that this person desired to share. In this space, the person could search for unfinished tasks, be it translation, editing, or file conversion. This person could then select the ones in which he or she was interested. The system would record the date and time of each activity and all tasks would then be placed in a workbench area. This person could always log back to the system and see the status of each task. Any communication regarding each task would be handled via

this system automatically. For example, the confirmation would be sent to both the person's private email account as well as to the mailbox within the system. Periodically, the system would check on the progress and send out reminders based on a pre-set schedule. For example, the system would notify those volunteers who have not yet turned in their translation within the two month period. Once a volunteer is finished with a task, he or she could upload the finished product to the system. Once uploaded, this piece of translation would be available for an editor. If someone were searching for an editing job, he or she should now be able to see this task and directly download the files from the site. Editors and translators would be able to communicate directly to collaboratively produce something with high quality. This way, the system would facilitate the distribution of labor more seemingly. The biggest benefit of this system, however, I believe, would be the transparency available to all members. Involvement in OOOS would then no longer be a black-box phenomenon where we could not track each piece's progress and email and where communication would continue to breakdown. Of course, I am not by any means suggesting a technology system without any human intervention. Like Linux, OOPS could have volunteer gatekeepers at different levels to facilitate the flow of work.

In such a system, technology not only could reduce the cost of coordination and increase the efficiency of division of labor, it could likewise facilitate communication among members. With the member profile information described above, members would be able to search for each other based on geographical location, majors, tasks (e.g. translator or editor) or any other relevant categories. I believe the ability for members to locate each other is pivotal in building a stronger and longer-lasting community. Once members have the means of finding each other, then exciting possibilities would follow.

As Doris speculated, some local groups could possibly be formed to establish a local link in this online community and to strengthen members' relationships and maybe even friendships.

In addition to being able to search for people, OOPS also needed a more effective way for users to search for content. The value of a piece of translation increases as more people use it. To put it differently, the translation would have no value if users could not locate it easily. Tagging each course with proper properties (tags) is not something trivial. Consequently, I suggest that OOPS should create some locally-relevant tags for each course. However, I also understand this could be a tall order, since each school and region categorizes subjects differently. Nevertheless, I see a slightly different approach to search that could help the users, to a degree, evaluate content quality.

I understand that any rubric for measuring quality is imperfect. However, I propose that we start from what we have. Let me go back to the technical system that I just described. This system would keep track of all activities by a member. Some very basic yet useful information could be generated. Take Doris for example. She translated and edited over 10 courses. Jessie also came close to that record. I also noticed certain people because their names appeared quite often in the course published notices. These volunteers' past accomplishments should "speak" for them as a way of building their reputations. In this regard, this system would also function as a reputation management system. When users search for content, they would have the options, in addition to the general keywords or discipline search, to search by content that was translated by someone who had contributed to more than five translations, for example. If we were to add the member profile information into the search, then a user could also search content

by a translator or editor's highest degree or school graduated. This way, a person's reputation would not only be based on how long they have been in the community, but would also be based on what they have contributed. I admit that these are imperfect measures of quality. However, I argue this could be a starting point where at least we could offer the users ways to distinguish what they might consider better quality content.

### Distributed Leadership

I learned from Filestorm's transcribing team that distributed leadership is something feasible in OOPS. As a loosely-coupled structure, OOPS embraced the modular approach as a way of division of labor. In Filestorm's case, he initiated the team, which was then coordinated by various sub-team leaders. What they accomplished then was added back to the OOPS project. My personal transcribing web site can serve for another example. I took the responsibility of maintaining and coordinating that effort, in which Filestorm and his team took part. We took a part of the OOPS project under our wings, and thereby relieved Luc and OOPS of some of the stress. As I proposed above, a technical-grounded system could help coordinate the increased complexity of communication among different entities. From this experience, I learned that a loosely-coupled organization could also have a pyramidal-like structure for reporting and decision-making. I realized that OOPS had not matured enough to form such a pyramidal structure. However, from Filestorm's and my own experience, I can only expect that more volunteers would take on different tasks, and OOPS would eventually develop a structure that would work.

Luc should receive generous credit for allowing and enabling Filestorm's and my endeavors. His compelling combination of personal humility and mature vision was the

key factor in creating legitimacy and influence in regard to both of our projects. Luc had demonstrated himself to be a leader who was always motivated by the greatness of the work, not himself. I saw this in Luc, Arnold, Doris, Filestorm, Jessie and many other volunteers. True leadership happens when people follow although they have the freedom not to. Luc allowed Filestorm and me to build our pocket of greatness that became a productive subsystem of OOPS. Greatness flows from giving the right people the right opportunity. Luc had the capacity to identify greatness in us. I learned that greatness is not a function of chance. Greatness required incredible humility and maturity to make the right choice. Luc and OOPS certainly had the capacity to foster more distributed leadership. He needed to “hang on” to those of us who would just continue to strive for better work since that was simply part of our DNA.

In addition to encouraging distributed leadership, as the respected leader of OOPS, one of Luc’s responsibilities was to set clear goals. Luc needed to make transparent his decision-making process, which would accordingly help the community decide on our course of action in regard to meeting a particular goal. Arnold, Doris and I had expressed our dissatisfaction with some of Luc’s decisions. I understand the vulnerability resulting from making everything open to the public, as I mentioned before. However, I think this is a must. Currently, we operate in a black-box. I am reminded of Arnold’s example; he had turned in his translation over two years before, and it had yet to be published online. My own experience echoed the same. My point was not necessarily to criticize anyone for the slow progression, even though that certainly was part of the concern. My point was mainly to argue that volunteers were left in limbo after we turned in our work. We did not know what had happened or not happened to our work. With the technology

system I have proposed, each volunteer would be able to see clearly the status of their work.

When OOPS makes its operations transparent, I believe the community will spot the problems and help resolve it. For example, the editor shortage issue was never truly revealed in OOPS. Through my conversations with Doris and Luc, I came to that understanding. Why not make that information available to the public? When we do not know about a problem, we cannot help in solving it. OOPS needed to be a more open system in terms of its process flow. Luc was in the leadership role to make it happen, and he needed to learn to rely more on the community to help.

#### Free Riders Encouraged

One of the best rewards for volunteers was to see that our translation had been used. As a matter of fact, the more people using it, the better. Just like the open source community, in OOPS, free-riders were encouraged. This, however, led to the question of usefulness. To make translated materials more useful and meaningful to OOPS' learners, we needed flourishing learning communities centered on different content areas, something Arnold took to his heart. Luc envisioned a learning platform where the translators were also the facilitators in the learning community, a vision also shared by Arnold and me. The collaboration between translator and user can bridge the experience asymmetry situation described earlier. Learners would learn from each other and help each other obtain alternative resources to supplement many copyright-restricted reference sources. OOPS had yet to form a learning community around translated content. In this learning community, peers can help each other overcome language barriers and support each other for a self-directed informal learning based on free content. In my experience,

many OOPSers were task-oriented and interacted for a purpose. If we had a healthy and social learning community, users might be drawn to congregate there. I saw this happened in the volunteer community; I envisioned a similar community for the learners. This was the best way to truly make free content useful and meaningful in the local context. This, I believe, will be OOPS' greatest contribution to the large population of self learners.

### Giving Back

To sustain itself, OOPS had to give back to the free knowledge community locally and globally. OOPS had already made its contribution in disseminating OCW by localizing its content, therefore improving people's access to the free knowledge. In addition to fostering learning communities, OOPS should strive to create our own OCW-like content. Luc certainly had his eyes on this direction. I sometimes wondered about cultural imperialism and if OOPS was embracing western knowledge too unconditionally. In this regard, the narrative that questioned the need for translation is significant. Some believed that translation will only further divide the "haves" with the "have nots." In their view, we should all learn English to become members in the global village. English, therefore, becomes the pre-requisite of accessing knowledge. In my view, translation and localization, even though a small step in bridging the knowledge gap, is a must to bridge the "haves" and the "have nots." I strongly believe in learning in our mother tongue. I often went back to what Jessie said: a language barrier should not be the roadblock to access to knowledge. OOPS not only removed the language barrier to knowledge, it also showcased one of the most profound human kindnesses. Through OOPS, I realized how

small yet powerful I can be. My small effort might have a profound impact on someone's learning, a person I may never meet and never know.

My encounter with OOPS was a fortuitous coincidence. It happened at the right time, at the right place, with the right people. OOPS opened my eyes to a whole new world that I was not aware of before. Because of my involvement with OOPS, I got to know people whom I would probably never meet. I was privileged to know my participants, most of whom shared with me some of the most intimate events in their personal lives. I was also lucky enough to get to know many important figures in the current OCW movement. I had the opportunity to know people from MIT, Utah State University, Rice University, and Johns Hopkins, just to name a few. I was invited to Rice University to discuss my translation experience and to help them build their translation platform. I realized that my OOPS experience had already enabled me to be helpful to others. I stumbled across this fascinating project and turned it into my dissertation. It turned out that this was an interesting and promising research area that will help me with many more research projects and grants in the near future. In the 21<sup>st</sup> century when technological development is a global team sport, the current OCW movement creates an inspiring use of that development. The nature of OOPS development fascinated me. That is why I have become an observer and researcher on OOPS' evolving process in addition to being a participant. Who would have thought that giving away things for free would involve so many difficulties? Choices have consequences, many of which might be unintended ones. I often thought about a poster that used to hang in my office. Accompanying Einstein's picture was this sentence: "Great spirits have always encountered violent opposition from mediocre minds." The greatness of human spirit



predicts a dynamic process in life. The right time, the right place and the right people brought me into this journey and will continue to aid me in my future inquiry.

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