Community Analysis

of the ATLIS Organization

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The Association of Technology Leaders of Independent Schools (ATLIS) was founded by three members in 2014 as an association directed to serve technology departments at independent schools, a niche group in the K-12 education technology field. ATLIS now provides services to over 200 member schools nationally and internationally. The new Access Points portal is a free service that hosts over 3,700 members who actively engage in conversation targeted to the community's shared interests, as seen in Figure 1. This paper will discuss the interviews of Susan Davis, the Director of Professional Development (Appendix A), and Christina Lewellen, Executive Director of ATLIS (Appendix B). The perspective of the two key members of ATLIS provides a deeper insight into the structure of their association, including its objectives and actions taken to accomplish their goals.

The mission of ATLIS is to empower independent schools to thrive through technology leadership (ATLIS, 2022). Independent schools can be defined as any school that requires a student to pay tuition (S. Davis, personal communication, February 21, 2022). The Access Points community discussion portal is one facet of the ATLIS services geared towards servicing technology leaders in the independent school sector. The online community discussion portal Access Points was born in July 2021 from two different needs, to have a digital accompaniment to the printed Access Points magazines and offer an asynchronous way of communicating to combat Zoom fatigue. It serves to provide two-way communication on high-interest topics. ATLIS uses its platform to provide a space where technology leaders can find resources to assist with training, network with other leaders with a shared interest in technology, and share relevant ideas. One of the critical traits of Access Points is to provide a forum for crowdsourcing

solutions from peer to peer, which reflects the features of a shared community of practice (Wenger, 2009).

ATLIS seeks to empower leaders to transform schools through technology implementation, and its mission is to ensure equity in technology understanding for all. Access Points posts tend towards discussion of technical nature, but the goal is to encourage more strategic discourse as this portal continues to grow (C. Lewellen, personal communication, March 2, 2022). The association strives to use community feedback to direct a myriad of online and in-person services that include professional development sessions, events, and conferences that address trending topics directed toward the independent school community. For example, cybersecurity is one area where participants want to learn more, so ATLIS is now offering online workshops to address this need (S. Davis, personal communication, February 21, 2022). Davis emphasized that serving members is a critical philosophy that will continue to drive ATLIS' operations which echoes the sentiments of Vogl (2016) 's position that leaders can "lead for the long term only when they are serving others."

While the Access Points community portal was primarily started as an offshoot of the ATLIS magazine, it also had a very intentional strategy designed to help people network and offer a future-proof central hub for online gatherings. Correspondingly, Lewellen described a critical goal of the online community is to help members as their roles in educational technology leadership evolve away from a narrow focus of IT duties and towards a more overall institutional direction (C. Lewellen, personal communication, March 2, 2022). In general, the ATLIS association's role is to support the entire community with technology expertise. They strive to foster coalitions, rather than competitions, with other relevant communities in the field, with one example being a partnership with the Center for Institutional Research in Independent Schools.

The pandemic inspired many of the new services offered to the ATLIS community to meet the members' needs. In reference to ATLIS' response to the challenge, Davis mentioned that the pandemic touches every aspect of the school and affects learning outcomes (personal communication, February 21, 2022). ATLIS was able to target areas of support their members would need by continuously monitoring the educational system response abroad. The Independent School Educators Listserv (ISED-L) was extremely helpful to see trends coming from overseas that addressed the obstacles presented by the pandemic. ATLIS' first response to the pandemic was to create a blog where community members were enlightened on the issues and supported through the challenges they were facing (S. Davis, personal communication, February 21, 2022).

Monthly virtual Town Halls were then established to further support the community in an open forum with no membership required. The virtual Town Halls provided a place for end-users to casually discuss topics, ask questions, share ideas, and crowdsource solutions. The sessions were recorded and posted for other members to watch on-demand as needed, as seen in Figure 3. The establishment of the Town Halls was a grassroots development, where the service arose to meet the needs of their membership (S. Davis, personal communication, February 21, 2022). The permanence of these virtual Town Hall meetings shows a robust needs-based commitment by the members, driven by the helpfulness and desire to be helpful. The member engagement demonstrates a needs-based commitment based on the social cohesion model (Kraut & Resnick, 2016). The Town Halls led the way to create the Access Points community portal, responding to members looking for an alternative to the virtual Zoom meetings.

ATLIS introduced the Access Points community portal for members to continue harnessing the energy of the Town Halls and give it an asynchronous space to live in, one of the

examples of providing white-glove service to schools (C. Lewellen, personal communication, March 2, 2022). The Access Points site has become more robust since its inception. Designers are developing the interface to be user-friendly, so it is easily accessible to members, helping address one of the main concerns that arose from the pandemic, isolation. Concerning the development of the ATLIS online community to support their membership, Davis stated, "We have just kind of evolved into this, understanding that everybody is not going to be in the same space anymore." She further elaborated, "We have to be able to meet people where they are" to allow for synchronous and asynchronous spaces for learning (S. Davis, personal communication, February 21, 2022). The evolution refers to how the content generated in the ATLIS community is organic, as seen in the discussion in Figure 2, and driven by the needs expressed by its members worldwide, at any time.

The ATLIS leadership responds to the identified needs by providing relevant information in accessible formats. In the Access Points community portal, Davis could be recognized as a social artist, using her energy and skills to inspire participation by being social yet intentional, with a genuine aim of creating a collaborative learning environment. In the literature, Social Learning Capability, Wenger (2009) describes effective leaders as those who create social spaces that encourage meaningful learning as social artists. Social artists are mindful of the factors that can lead to a social learning space's success, including navigating the complexities of online learning spaces, while keeping the organization's vision in focus, as seen in the discussion forum in Figure 2. One way to build commitment is by leaders carefully selecting, sorting, and filtering content and activities that meet the needs of their community (Yuqing et al., 2016). The ATLIS leadership seems to have adjusted to external and internal factors impacting their group's mission, continuing to respond to members' needs.

Since its inception seven years ago, the ATLIS community has been focusing on the needs of its community while growing its member base steadily through the years. ATLIS' initial database was affordable; however, it had security issues and was limited in its functions (C. Lewellen, personal communication, March 2, 2022). In December 2021, ATLIS rolled out a new database to introduce new features to their site and collect more relevant metrics data, including volunteer involvement. New tools such as member discussion tracking and lead generation from free member discussion were introduced, but data collection for these features is not yet a priority. There are no analytical measurements provided to assist in determining user engagement, but this may be considered in the future.

Metrics collected have noted continued growth, and impressively showcase a strong member retention rate of 90%, as well as an increase of 20% since the rise of the pandemic, which is well-above the industry standard (C. Lewellen, personal communication, March 2, 2022). Metric reports of demographic data are captured and analyzed to ensure that diversity, equity, and inequality (DEI) standards are being met and topics are addressed to support DEI through an advisory committee. In addition, ATLIS recently implemented a feature to capture DEI concerns that affect all dimensions of their practice to inform their services further. The ongoing push for DEI has been a priority of the Executive Director since she joined the team, aimed at revolutionizing this space with a fresh outlook.

Regarding community engagement with Access Points, it was noted that participation is one of the most significant concerns. Five employees dedicate time to overseeing the boards, posting discussion content, and answering questions to keep users engaged. Additionally, Davis mentioned they request specific members to contribute, a design strategy referenced in Building Successful Online Communities Evidence-Based Social Design (Kraut & Resnick, 2016). "I

might go out into the community and say, you know, look, you've been doing this, can you ask the question? So it isn't just coming from employees" (S. Davis, personal communication, February 21, 2022). Davis brought up another critical issue, that participants expect immediate answers or would otherwise lose interest in the thread. The concern further cements the need for the volunteer deputies to oversee the discussions hosted in Access Points. One additional point to note is a cyber symbiotic relationship in the portal between members and ATLIS leaders. The relationship closely relates to a Kraut and Resnick (2016) design claim that contributions from high-status people (ATLIS leaders) can increase members' contributions.

When thinking about how a community orients itself towards the process of learning together, a vital driving force is the need to cultivate the community itself (Wenger et al., 2009). ATLIS demonstrates excellent dedication to community cultivation through the leaders' focus on community development, as indicated by investing in their online community portal and hiring an association management leader as their executive director. The activities and connections associated with ATLIS signal a strong leadership and established core member group that strives to maintain internal coordination and cultivate the community. An earmark of success in this orientation is a community that is responsive to the changing needs of its members. ATLIS leaders are purposefully and proactively cultivating their community, as evident from their recent website redesign, communication offering content additions, and investment in leadership geared towards growing the community.

As the Access Points community portal continues to grow its reach to help educational technology leaders in independent schools, ATLIS must sustain the development of its online community to match its members' interests. A recommendation is that ATLIS leadership analyze the different metric data points collected to guide future updates to the site. As the membership

numbers increase, ATLIS should consider assessing the direction of the member discussions and implement subgroups to improve identity-based commitment to the community (Kraut & Resnick, 2016). Extending their focus to international schools could also generate additional identity-based commitment from that segment of the independent school sector. Overall, while ATLIS is continuously working on achieving its goals, we recommend they continue using member feedback and metric data to drive the resources and services available to their members.

Collaboration

| Group Member | Tasks |
|------------------|----------------------------------|
| Susan Murray | Project planning |
| | Contact online community members |
| | Developing interview questions |
| | Collaborative paper writing |
| | Interview 2 |
| Giancarlo Perez | Project planning |
| | |
| | Developing interview questions |
| | Collaborative paper writing |
| | Interview 1 |
| Michelle Zgombic | Project planning |
| | Developing interview questions |
| | Paper structure and draft |
| | Collaborative paper writing |

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Figure 1

Access Points Community Portal hosted by ATLIS.

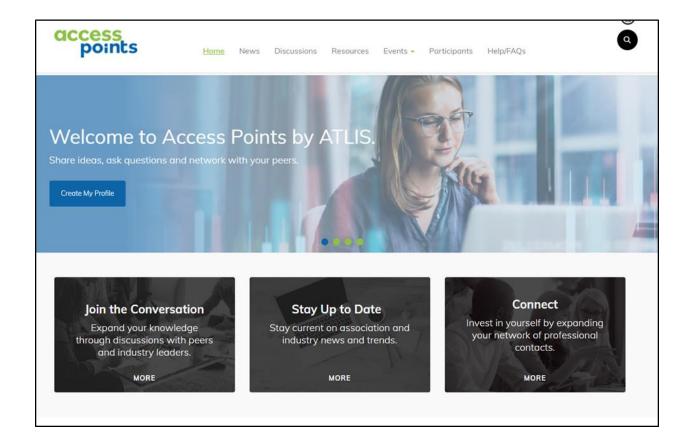


Figure 2
Sample discussion board post in the community portal and filtering feature.

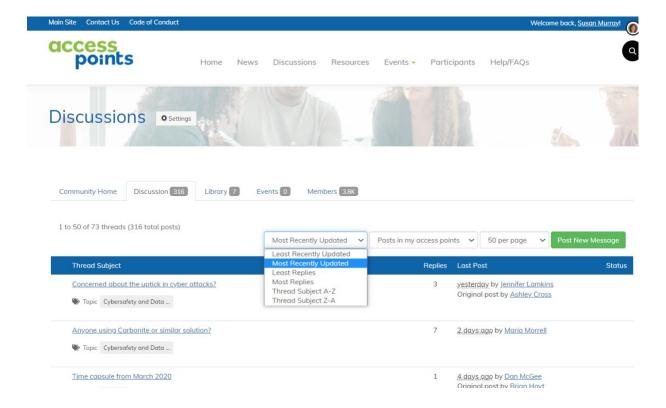
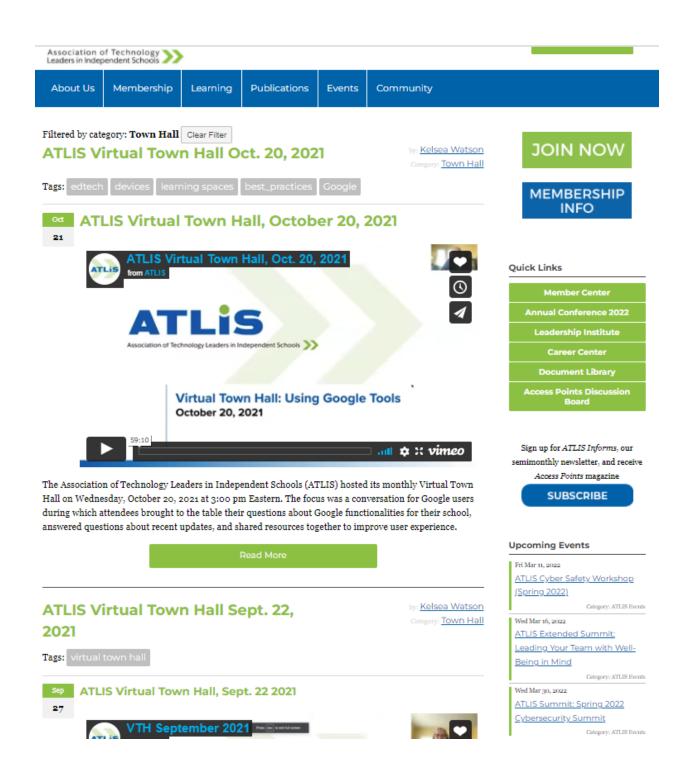


Figure 3

Recording of a live Virtual Town Hall session to be viewed "on-demand."



Appendix A

Transcript with Susan Davis, Director of Professional Development

February 21, 2022

Giancarlo 0:00

We will keep everything as transparent as we can - it is just for a project. And there won't be any publishing or anything besides this.

Susan Davis 0:12 That's fine.

Giancarlo 0:14

All right, thank you so much. It's really good to hear that you've been there since the beginning, because one of the main questions is "What are the main goals for ATLIS? And how have they, since you started, changed?"

Susan Davis 0:28

Right, so ATLIS was formed by people who are in the community, just to serve a need that was missing. So basically, the three founders saw that there was a need for people to be able to gather together and have a professional space, to share ideas and, and support each other. And there wasn't something that served specifically technology people in independent schools. There was for public schools, but it's a very different thing. And so, you know, they just sort of took a chance and started it, and to serve the people like themselves. And it grew from there. So it really was started and created to serve independent technology leaders and independent schools, and

we interpret technology leaders as a very broad range of different kinds of people. Basically, anybody who touches technology in school considers themselves a leader. As we know now from COVID, we didn't know it then, but we know it now, that it's something that touches every aspect of the school and really affects the learning outcomes. And so it really comes from that impulse. Yeah.

Giancarlo 1:52

I understand that it's very important to be able to support technology leaders. But can you expand a little bit more in the independent school sector? Because I'm not familiar as to how it is different for edtech in the independent sectors in the public sector.

Susan Davis 2:07

Sure, happy to. So independent schools would be any school where a student has to pay tuition. Okay. So they're not subject to the rules or regulations of all the public schools. They don't get money from the government, usually, although there's some technology ways that they can get money. But because they're independent schools, it would be equivalent to maybe if you looked at a very tiny small school district, where, you know, you had a technology team, and they just serve like one school, or maybe two schools that boast tech. Most public technology teams, public school technology teams serve, I don't know, maybe 10 schools in the district a lot, right. And so there's the tech team is in the central office, making all the decisions and all that they may have some embedded teachers and educational technology in the schools.

The technology team for that independent school slips over educational technology, institutional technology, and also the support technologies for anybody who works in a school. So, you know, they cover a lot of territory, but because they're in that smaller space, it sort of takes a renaissance person to fulfill that role. They're not as specialized, because the people they serve aren't as many. Now we have people in schools that, you know, might be under 100 people all the way up to I don't know, our larger schools might be 1500 people.

Giancarlo 4:11

So like, now, I understand a little bit better about what you mean by ATLIS supporting a small group of institutions. Because this seems like it's very niche. I know, Susan, you deal with a school that is that way, right? Susan Murray, I mean. So yes, she's in a private school as well. And as you're trying to support your community, how has that changed with COVID? Because how have your goals changed? Or how are you trying to adapt to the needs of your community since the pandemic.

Susan Davis 4:50

Right. Well, I will tell you that the online community around Independent Schools, private schools and international schools which are also mostly private. Ah, it was amazing during the pandemic. So there's a listserv called Independent School Educational Technology Directors (ISED). Oh, educational directors, educational technology directors, I'm asking my husband because he's one of those guys. This listserv was where we, in America, we could look at all the information coming to us from China, from Hong Kong, from Italy, you know, before we could

see it happening, and they were figuring it out ahead of time. So it's like, it wasn't just (*audio broken up*)...

Susan Davis 6:03

that ended ISED listsery. And if you like, I can follow up with a link to that listsery. So you have a sense of what it is. But basically, we saw people just needing to get together and share information. So what we did was we, we gosh, I mean, I remember the very start of the pandemic. First thing I did, when I started saying this was going to be real, was I wrote a blog, because I'm a blogger and come from a blog background. So I wrote a blog, and I basically said, independent school people, you've got this, you have the skills, you could do it, you've got the skills, you're lucky enough that you know, most of the kids in your community probably have access to technology, you know, you're going to be able to do this. So that's the first thing I did. And then the second thing we did as an organization was we started having these, what we call town halls. So we had just these online meetings, open online meetings. It didn't have to be a member of ATLIS, but it was usually somebody who was an independent school. And, and they would come and they would just say, What are you doing about this? And how are you sharing that? You know, it was really a grassroots kind of development, that they would come in and ask questions of each other and support one another during that time. I mean, I remember our first meeting, we had somebody in from the American School now. And she was really giving us a heads up for this is what's coming down the pike.

Giancarlo 7:38

Yeah, cause Italy had a real bad. So I'm assuming they went in that direction. Right?

Susan Davis 7:46

And so from that, I would say, you know, we already had a kind of robust community and ATLIS. But we have various tools that we use for that. We had a person gathering conference every year, and we had various other things. But during COVID, I would say, you know, we got really, really tight, you know, really, really dependent on one another and thankful for one another, the gratitude is huge. And in ATLIS, at least in my role as professional development director, my role I thought was just to create space for people to come together. And then I get out of the way.

Giancarlo 8:28

Gotcha. Okay. So is this kind of like where the Access Point forum came from? Like the idea?

Susan Davis 8:37

Okay, well, that's an interesting development, too. So, as you're studying online communities, that is probably the current iteration of what is closest to what you might consider an online community in your class. Right, we had this kind of informal network that was our town halls. But the Access Points community was our conscious effort to sort of take that energy from the town halls and give it a space to live in.

Giancarlo 9:09

Okay, I see was, was this just a development out of the need for an online version of your town halls or just a location for it to like live?

Susan Davis 9:22

Well, our our sense is that from the very beginning, ATLIS saw the need for people who are somewhat isolated in their jobs to have a way to come together. And our understanding, and this has evolved over time, but our understanding, my understanding now, is that people don't... let me backup a little bit. In the late 2000s, there was a lot of excitement about online communities. I was part of online communities if you did anything But the history you might have heard about a community space called being, which I use it several different ways. But but that kind of died out, then a lot of educators moved into the online space on Twitter, and was very active in the education space. So, yes, then that kind of got ruined. I mean, if you ever want to be frank about it, I mean, you know, the all the politics, and all of that really was kind of a turnoff. I couldn't get young people to use it. It was just kind of dying out. And I would say we've been constantly looking for ways in the moment, you know, what, how, how, and where do people come together? And how can we find and provide meaningful ways to connect? Yeah.

Giancarlo 10:51

And was that more of a development of you trying to achieve your goals as an organization? Or did that come from more like a member's push to find this online community?

Susan Davis 11:03

Yeah, you know, I would just say that those things were kind of together from the very beginning. Because independent school people, you know, there might be one person who's an independent school technology leader, one in a school, there might be one person who does

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everything, there might be five, or there might be 12. Right? But they're pretty isolated. And they

were all isolated from each other. So I would say from the get go, there was this, this feeling that

there, there was, there was a need and a desire to come together in online spaces, whatever was

being used at the moment. And we've just kind of evolved into this, understanding that you know

what, everybody's not going to be in the same space anymore. Everybody's gotta be in different

spaces. And we have to learn how to support you know, it's a little bit harder on us. But we have

to be able to meet people where they are.

Giancarlo 11:59

Yes, you're saying it's a little bit hard to support a member in different spaces? What other spaces

do you use besides just an online forum?

Susan Davis 12:07

That's a good question. So we have tried different things. I would say we've had an online space

in Slack, we moved out of Slack in our online space. And Slack is what turned into the Access

Points.

Giancarlo 12:27

Oh, that makes sense. It's like it's a great spot for conversations and just to develop discussions.

Susan Davis 12:32

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Right. But before that I had to have it online. It used to be a hybrid way of delivering a year-long

leadership professional development course. And in that, in that course, I was always looking

like I was looking for an LMS I was looking to work.

Oh, a robust place, where we can converse or asynchronously or synchronously wherever, just

wait for a while. space for us. And then we moved everything. And now I do everything in this

one year-long cohort. Like any online community, or community of practice.

Giancarlo 13:44

Susan, I'm sorry, I kind of missed a little bit of that part, you're cut off for a little bit. All right, I

went under breaking up about your community of practice.

Michelle 13:52

Yes, yeah. So we've read Wenger's books, we just finished Digital Habitats.

Susan Davis: So there you go.

Susan Davis 14:01

I would say that's sort of the philosophy and the, you know, the groundwork that I come from

sort of, in the trenches, you know, sort of learning on the side. I'm doing that, oh, I'm not doing

that, you know, learning as I go. But I would say for our year-long program, which is now called

the ATLIS Leadership Institute, that that was, you know, an online space called participate that

housed everything where we had discussion boards, and, you know, that was where all the basics

was. And then we move that over to Google. So now, we all have everything on Google Sites, and it's so we get at least maybe two meetings a month. I have found over the years just for your information that it's the interest in discussion boards, like, Access Points. Right. That's, that's, that's essentially discussion boards. Yeah. The interest in participating in that is really tough to maintain. I mean, it's very, it takes a lot of care and feeding a lot. And it's just harder and there's just less interest.

Michelle 15:36

Yeah, we've been reading that there's a lot of people that are learner lurkers, they like they view it. They don't participate necessarily.

Susan Davis 15:45

Yes, yes, absolutely. That is so totally true. So when you say a lot of care, and feeding on the end of ATLIS, as an organizer, is that we're right, a lot of characteristic in the sense of, you know, generating questions. Maybe there's something developed in the community. And I don't, I don't oversee Access Points, but I was part of its development. I mean, I might go out into the community and say, you know, look, you've been doing this, can you ask the question? So it isn't just coming from employees. You know, there's a lot of when people respond to a discussion board, they want an answer, almost in real time, right? If you don't give them any attention, they're just gonna waste away.

Giancarlo 16:30

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So part of that. Do you have people that are dedicated to just monitoring and making sure that

somebody gets an answer? Or how do you decide? Yes, so we go, how do you encourage them to

thrive?

Susan Davis 16:46

We have two staff members who are charged with monitoring and don't have enough time to do

it. I will tell you, honestly. And so they have a whole bunch of volunteers that they work with

sort of deputize to go in and keep that going.

Giancarlo 17:03

That's good. How do you send Analytics? Like the data, the metrics, the conversations to like,

Susan Davis 17:11

How do we use it?

Giancarlo 17:13

How do you use it? And how do you get it, like, does a platform provide all this data?

Susan Davis 17:18

I have it. So I'm not your data person. I think Christina will be able to tell you a lot more than

that but it worked for I think it's an I'm trying to think of its workforce. I'm not even sure of what

they're using now. But there are analytics that are provided. You'll have to get more details from

Christina. And I would say how do we use it? We, you know, we can develop content. When we

see a hot topic evolving. So we were small enough that we could create a webinar or what we call summit where people could come together around a particular topic. We did this recently with evolving interest in the metaverse in the interest in the metaverse. Yes, there was a big discussion started, it was actually started by somebody who was part of my leadership from last year. And then she's sort of a fan girl, a lot of the people who are in this discussion on Twitter. And then and then we had this great, you know, online summit discussion, in real time recorded about that particular topic. So if there's this really organic way in which you have these days, it's like you have to have all these different ways for people to come together and communicate.

Giancarlo 18:56

Yes, absolutely. And it's good that you bring that up, because I was just wondering, in 2014, you were probably one of the first organizations to directly tackle the independent technology organization. Have you seen any more organizations like yours pop up? Do you collaborate often?

Susan Davis 19:18

You know, I think there is some overlap, but we're still pretty niche. There's some overlap in the sense that we serve independent school technology leaders, but sometimes those technology leaders are also, say, the head of the business office, right, there's overlap and the jobs. And there are organizations that serve those people that we work with. There are regional organizations that have sort of smaller groups of technology leaders. For example, one group we've worked with closely, it's in the Northwest Association of Independent Schools. They have, before COVID. But that, you know, they had many groups of technology people that would get together maybe

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once or twice a year. During COVID, many, many of these regional associations, smaller, you

know, smaller regional associations or specialty associations like boarding schools association,

or that, you know, those, they would have special meetings, just technology people, because so

much was going on.

Susan Murray 20:33

Yeah, I can speak to that. We have our committee, and we were meeting weekly like it was, like

we helped each other through, and checked what are you doing? And you know. So I can speak

to that locally.

Susan Davis 20:52

Yep. Yep.

Susan Davis 20:56

So I would say that with those kinds of organizations, ATLIS collaborates on a regular basis. I

mean, I know Rebecca well, and you know, I've done cybersecurity workshops for GIS.

Sometimes they'll come to us for some kind of specialized technology topic that they may want a

recommendation. So speakers, you know, there's just a lot of give and take with the ATLIS,

which is national and somewhat International, really small, since we have a few schools outside

the US. And then these regionally associated groups, which are dealing with all of education.

Giancarlo 21:44

Yeah, we were just checking that out a few minutes ago, before we started the interview with a few international institutions that are a part of your organization. Is that something you plan on expanding? Or are there other focuses right now? And you'd rather wait?

Susan Davis 22:02

Yeah, well, obviously, with any kind of organization that's built around membership, we want to expand our membership. But we've got to do that in a sensible way. We definitely see a need in the international community. But when you talk to, Christina ask her about that, because she had experience with another Association, growing it into international space. And I think we just got to take it slow. I mean, the staff has to be able to handle it. You know, right now we'll work on expanding our membership within the United States, mostly.

Giancarlo:

Do you see like access points is providing a jumping off point for membership,

Susan Davis:

I don't know if that has any direct effect, I would say this, for my experience at ATLIS. Every interaction that I have, online, in person in print, any interaction that I have with the people that we serve, independent schools, is a touch point for membership. And that's really our philosophy, it's we want to serve our members, we want to be valuable for our members, we want to think about what they need. But, you know, that also grows our membership. That's what associations do.

Giancarlo 23:23

That's a great way to be organic, because just like the pure interest on trying to make the field better, will drive you, because there's a whole passion for it. And I see that the membership, access to access point, it's free. How does does that give you like a little jumpstart to paid memberships?

Susan Davis 23:44

it certainly introduces you to the kind of conversations that you have there. And you know, it provides us with a community of people who we can tell, well, this isn't just what we do. Right. It's the free entry point. And then we do many, many other things where we have our in person conference, like I said, and we have other kinds of really, I don't want to call them services because they're not services, but it's service oriented, professional development Focus.

Giancarlo 24:24

Yeah, it only makes sense that when you're targeting a very specific need, you need to apply very specific amount of hours of professional development that might be an issue. How do you handle that in ATLIS? In the online community, is there a way where members present issues to talk more about to discuss?

Susan Davis 24:48

I would say almost everything at ATLIS comes out of the community. Either the community discussion and access points or you know, in the early days, they would just call us Tell us what was going on, my interactions with the leaders who are up and coming, you know, I have a real

finger on the pulse of what's happening by working with these up and coming leaders through the ATLIS Leadership Institute. We also do a lot of reading on our own, you know, we have a passion for education and technology as they converge. And so we'll always be reading and, and have interactions with all kinds of regular newsletters and that sort of thing. You know, from Edutopia down to a little tiny newsletter that might be focused on a particular topic.

Giancarlo 25:51

What is the most trending topic that you're hearing about right now? What is the community talking about? What is the big issue or need that is developing?

Susan Davis 25:59

Well, I'd say to one, the most trending topic right now is what's happening in the meta-verse? What's happening? This Metaverse where there might be opportunities for adults and children to learn in a safe space. I will tell you that I'm a little skeptical of it. I'm the one who comes in and says, how is this different from Second Life? we did that, you know, but I see a lot of energy and a lot of excitement about what's happening there. And I know more power to him, I'm really excited. I would say there's this new space where we can come together, right. And remind me to come back to the idea of the fourth teacher. So there's that. And then, the other big topic that is on everybody's mind, though we wish it wasn't, is cybersecurity. That's a big place where ATLIS does a lot of work. And then the third thing I'll add to that is one of the things I'm passionate about as I am wrapping up my career is the intersection between diversity, equity, inclusion, and technology. I just feel like those three things are huge. And then it all comes back to the learning, right? If you're interested in education, then you're reading about what's developing in education,

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all of which has an internal intersection with technology. Just to throw out there my theory about

the fourth teacher from Reggio Emilia, if you know that theory, you have the first teacher is the

physical human-being teacher in the classroom, the second teacher is the students, peers in the

classroom. The third teacher has often been talked about as the environment of the classroom.

But I maintain that the environment now is two environments operating simultaneously. And that

is the physical environment and the virtual environment

Giancarlo 28:16

The hybrid world.

Susan Davis 28:21

It wasn't there before COVID. We wished it was, we tried to make it be there. But suddenly after

COVID It's there, whether people want to acknowledge it or not. Everyone, all of us are learning

in both ways.

Giancarlo 28:40

It just came to my mind, but it just brings together all the concepts, how we leapfrogged with

technology from accessories in the classroom to necessary components of today's lessons.

Susan Davis 28:57

Right. But we also have to always remember that it's not about it, the tech, we lose, we get all

excited by the bells and whistles. But it's about the learning of the adults and children.

Giancarlo 29:13

And development from the AR to the VR to now the metaverse and even bringing it back to Wagner how we were mentioning earlier about digital habitats. And what is driving your online community is now that the metaverse is here, are we going to use that as an educational tool? Where do you see online communities going forward? Now, now that we have this new media

Susan Davis 29:51

I really believe that it's going to be many places. I really don't feel like the world is just going to be bifurcated or trifurcated or Quadfurcated. The people, they're going to be where it works for them. So there's not going to be any one place. I don't think we just have to be aware and knowledgeable of all of them.

Transcribed by https://otter.ai

Appendix B

Transcript with Christina Lewellen, Executive Director

March 2, 2022

Interview conducted on 3/2/2022

Susan Murray 0:02

And, you know, we're just going to use it for your responses for our project. And we had a really great discussion with Susan Davis, which gave us a lot of insight about ATLIS, which is really great. I mean, the organization, I just as a user have seen it change so much in the last year, it seems from the outsider's view anyway. So I'm really interested to get some feedback from you. And it just even thinking about I know that your mission is empowering schools to thrive through technology leadership, and you serving your members, can you speak to a little bit more about sort of like, those goals? And how you, you know, how those have evolved over the years and things like that, and how you feel that's changed at all?

Christina Lewellen 0:48

Yeah, it absolutely has changed. I love that you mentioned that you've seen an evolution, that makes me so happy, because I think that we are starting to step into our own. So if I take a step back, you know, when I when I, I think when ATLIS was founded, as Susan probably told you, we were this amalgamate, we were this grouping of, of technology focused leaders in the independent school space that really didn't have a home. So you know, they would gather up at any time or they would gather up at other industry events, and try to get together in an informal

way. But there wasn't a consistent sharing across the profession, I guess. And so when ATLIS was formed, we had this very focused energy around technology leaders. But the way that I would describe it is that we've evolved to now have our energy focused on technology leadership in independent schools. So that's not our name, though, we joke about it being our name, you know, technology leadership, which clearly is more than just the tech team. So when you are making decisions about what technology to implement, there's some it's so deeply strategic at this point, it's we're long past, the place where it was just servers and, you know, popping iPads in everybody's hands, we're into a place where we have to make decisions at our, at the school level to make sure that technology is supporting the mission of the schools. And so ATLIS has evolved to make sure that we're supporting not just the technology teams, but really the whole school's approach to technology. And that doesn't mean that we are wading into the waters of being an association for heads or Business Officers, you know, we're still very focused on the vertical that we serve. In terms of, you know, we do believe that technology is a very distinct element of, of independent schools, and where in the last few years, technology has become so ubiquitous, it's just everywhere, and it touches everything. So what we find is that tech doesn't always have a home, like To whom does technology report and who is truly responsible for technology? And so our evolution and what that mission means to us now is we're helping everyone sort their role in technology leadership.

Susan Murray 3:10

Oh, great. That's yeah, you hit on so many things that are near and dear to my heart. Yes, it is. It's like, the lines are definitely blurred. And also a lot of I think a lot of it depends on the school size. And, you know, as far as how those responsibilities are, but I, you know, I really value the

information that I can get from groups like ATLIS. And how do you when you think about one of the things we talked to Susan, too about is thinking about sort of the metrics, how do you measure what's going on in ATLIS? As far as sort of member satisfaction? Do you have certain ways that you really sort of track different things like even member participation, and maybe like the ATLIS, discussion board and things like that, and curious to see how that works on your, from your perspective.

Christina Lewellen 3:56

That's it, that is, uh, we're standing in a moving stream on that. We're right in the middle of it, recognizing that, you know, because we're only six or seven years old. And we started as an event, then, and we were run for multiple years by, you know, Sarah Hannah Wald, who came from the industry who came from independent schools. She built a team of people who came from independent schools. My background is in association management. So to hire me was a big change. So I've run associations for government contractors and courts, stenographic court reporters, so I learned the industry. My career is in running the association that serves the industry. And there's a whole group of professionals out there who like me have built a career in running organizations like ATLIS. So when the board decided when they were hiring, they had to choose a path basically. So what they chose was, you know, either go with someone from the industry or go with an association manager supported by the expertise of the industry. And that's what they chose to do.

So to get to your question, we're getting there. So what has happened in the last couple of years, I started my role as executive director, which is the chief staff officer of the organization. I started

six months before COVID. And the summer before COVID. So I had about six or eight months of normal, and then the world blew up. And, but I definitely believe in not letting a good crisis go to waste. And so what we have done in the last two years, is invest in the infrastructure that we will need as we grow.

So for example, just like a school, right, like, our database was limited, because we were teeny tiny, it was super cheap, you know, cheap, easy, fast, right? You know, I have a couple, that triangle. And so um, you know, it was cheap, and it was affordable as we started, but it was very limited in its capacity. So it also had some security issues, in the way that it didn't require multi factor authentication. And our insurance didn't like that very much. So serving a bunch of CIOs, that's not the kind of thing we want to be talking about in a boardroom.

So we've made some technology investments, and we're actually going through those growing pains right now. So to get to the data, I'm measuring membership engagement is very important to us, it was something that we sought out with the new database, so I can't actually tell you what it is right now. But I can tell you that nobody really has, there's never a good time to make a technology transition, as you well know. It's always painful. And so we had a moment at the end of December as the year the calendar year was wrapping up, we all kind of looked at each other and like, are we going to do this? Are we in it, are we going to wait for a year and we decided to jump in. And so we're swimming in it right now trying to make that transition, but part of what we want to do?

Yes, we measure the typical, both new member numbers, we measure retention, since I took over our retention was in the 70s. And now that I've been here a couple years, our retention rate is up in the 90s, which is well past industry standard. That could have a lot to do with the pandemic and our offerings, you know, the evolution of our offerings. But it also could have to do with the one kind of the white glove service that we attempt to provide our schools when they need something. And so we try, we look at our retention rates, we will look at engagement rates as we move forward.

We also try to look at things like the number of volunteers that we have involved in ATLIS. And one of the things that we do because that can be a really lovely indicator of a healthy organization, is if you've got a breadth of volunteers involved in a variety of ways. And so we've not only tried to beef up our volunteer pipeline a little bit, but we have raised our hand and volunteered for a really important research study that's happening in the association space around the value of a volunteer, the engagement of a volunteer. So we were in phase one where we did the quantitative stuff. And now actually, we've been selected to be part of the qualitative stuff where we'll get some good data back about how our volunteers feel about ATLIS and where we have room to improve as we grow and kind of solidify our processes.

So I think that I'm trying to think if there's any other data that we're focusing on, is in the realm of DEI. But not just because it's a trendy thing we had established, you know, the DEI piece of ATLIS, our strategic plan has a statement that includes across the statement is across all dimensions of its practice, "ATLIS consistently demonstrates its commitment to creating a diverse and inclusive association", I'm looking at it hanging on the wall. And, and so the idea

there, and so that was actually pre-George Floyd. And we had a diversity, equity inclusion advisory committee that is a standing committee, but we do need to start measuring that. So on the staff side of the association, what we do is as a 501C3, we report our data as reported through GuideStar, naturally, like our 5990s, and whatnot. We've started doing some self disclosure demographic data, just so that we're clear about who's running the organization, and we can kind of get a picture of that. So we just started that, we also are starting to and I think we're I think we're kind of ahead of the curve in terms of associations doing this work. We're tracking our vendor demographics as well to make sure because ATLIS itself spends a lot of money, right? We buy databases. We do events and we hire photographers and we order swag. And so for the money that we spend, we're also starting a project where we're attracting our current vendor community. I have no idea what that will look like. That's a big project that we have in the pipeline for the summer. But the idea is let's start tracking it now while we're tiny so that as we grow, it'll be easier to track it over time as we get larger and spend more money.

Susan Murray 10:24

Well, that's great. That sounds like you really have a lot of foresight. And in thinking about that sort of thing, like you said, I think I haven't come from that background? That's, that's got to be really valuable for this I'm sure.

Christina Lewellen 10:37

It's a lovely blend. I mean, because I think that you know, there's still Susan and Ashley coming from Indie schools, I will always have a mix. I think on the team, it'll be a mixture of association people and Indie school people, because it makes a very powerful combination.

Susan Murray 10:51

Yeah, that's really interesting. Just thinking about one of the things that I noticed was the ATLIS access points, the online discussion board. So do you do anything I know, Susan mentioned you have sort of two staff members who sort of oversee that maybe some volunteers? Do you do any sort of metrics on that, like Lorgar, leader convert conversion or speed of questioning or answering do do any, capture any of that kind of data?

Christina Lewellen 11:21

Um, if that data is there, it is not optimized, in terms of it's not always seamlessly integrated with the profile on the database. And that's part of the limitations of that former platform that we were on. Okay. Um, for us, the access points, the Community Portal was a complement to the print magazine. Did Susan explain that? And we really, and there was an evolution happening as a result of the pandemic, where we were having these town halls where the community would come together and crowdsource solutions. And as the pandemic wore on, and people were getting fatigued with Zoom, we were like, well, how do we keep these conversations going. And so we chose to launch the community portal as more of a, you know, networking connection kind of piece, and we see those conversations still happening. I think that we also decided to make it available to everyone. So there's an element like, it's not just a member only thing. So you can sign up for a profile, which then does connect to our database. In terms of tracking those conversions. We haven't really been tracking that, because it's really not the priority right now. Like, I'm not gonna sit here and say that it isn't a lead generation thing for the future. But really, we were just responding in this heat of the moment of the pandemic, trying to find a way to keep

people connected in an asynchronous way within the ATLIS community not having to go out to some other Listserv or some other because if they're, if half the communities on boards, and some of them are using the Listserv, they're not truly coming together as a technology community. So we wanted to create the platform. And in time, I think we will optimize it, but it too, is a very new product.

Susan Murray 13:07

Okay. Yeah, that's what I was. That's one of my questions, too. Is this, is this a focus for you the access points? Or was it now you've just sort of explained that to me? I didn't know if, and I know it's a compliment to the magazine? Is there lots of doing away with a magazine or you still have that?

Christina Lewellen 13:21

No, actually, I am, I come from a publishing background, I started my career in association management, I was a journalist, and I started my career in magazines. So I have a very strong affection for magazines. And I still believe strongly that where we hear the energy around the death of print in the general mainstream media, and that may be true. But when we're talking about something so focused as independent schools, technology within independent schools, I think there is a role for a tangible product. And it might not be that we send it out once a month, it might be a more limited engagement. But I see for the foreseeable future, the value of people picking up that piece of paper and feeling connected to their community. I do think that there's a role for the online complement. So that discussion can be two way instead of a one way discussion, where I think the online complement means that we can have a multi back and forth

kind of conversation. But no, in fact, we invested a significant amount of money during the pandemic to redesign and relaunch the magazine. So it's not going anywhere. Okay.

Susan Murray 14:27

That's really interesting. So that's so the access points is not sort of a focus in and of itself is definitely a compliment. I didn't know if you think about when you look at access points, or because this again, my class is all about online communities. If there are certain sort of discussion threads or things that happen in that space that you say, "Oh, this is an exemplar" We're happening. This is happening. And I know even Susan mentioned that they sort of look at what's happening, what is the hot topic that's evolving and then my two year townhall based on that which we love, but we were all talking like, this is great. It's so organic, like you're really listening to the tone of what's happening. And how do you sort of measure that? Is it informal to decide what is the hot topic? How does that happen?

Christina Lewellen 15:16

Well, I think that it, I think it's, it's a two way thing, right? Because first of all, there is that element of if something is kind of popping up. And it's pretty informal, we're just kind of always on there, you know, watching if something is bubbling up, then we can take that as a staff and translate it to formal PD and help basically do the heavy lifting of combining and compiling the either the answer the solutions, right, like, Oh, we're seeing that this is an issue over here, let's pull together a panel of experts to address it. So there's that flow. But there's also an opposite flow, which is, sometimes we want them thinking about certain things, and we poke them. So if we're seeing something that we're concerned, like log for J, or, you know, with the Russian

invasion, there was this little spike of what's, you know, are people concerned about Russian hacking, so we'll go dump that in to the discussion boards to try to generate some responses there. So we kind of, it truly is kind of a symbiotic relationship, where, you know, we're both pulling from it, but also feeding it. And I do think that, um, as, as we evolve, the discussion boards, you know, the community portal, as we call it, is really a central hub of online gathering for the future, like it is a very intentional strategy. And, you know, I definitely didn't just throw it up there. Because, you know, other organizations have it, we were very conscientious in terms of how we branded it, and how we positioned it. And we wanted to make sure that it was an entry point to ATLIS, and it is open to the whole community. And so, you know, yeah, we might, you know, there might be some boards on there that promote an ATLIS product that you only get access to if you're a member. So maybe that would be the rub, maybe that's the encouragement to flip over into membership. But ultimately, it serves us as much as we serve it. And so it is this lovely little idea generator, it's like a little fishbowl, you know, it's worth the investment, from my perspective, to see what kind of conversations are bubbling up.

Susan Murray 17:23

Right? And do get, again, Susan mentioned, you have two staff members who are more like, do you get concerns about inappropriate posts or like vendors putting like is that any?

Christina Lewellen 17:34

It hasn't bubbled up yet, we reserve the right to, so we made sure that we had a policy in place that if something is an irritant for whatever reason, you know, into whatever extreme that we would have the authority to monitor that. I will also say that, I see where Susan's coming from

saying to staffers, but I want to, I would actually challenge that a little bit because we as a team, we are small, there are five of us, and we all have responsibility for it. So you don't I'm saying like, I get that she clearly indicated that to you. But I don't look at it that way. And I think that that's a very narrow view. Yeah, I mean, I might not be the one posting it. But I could literally be in an airport, pick up a cool article, or you hear of something going on in the digest. And I'll ping the team on Slack. And then it'll be posted within hours, you know, or we'll respond or share a resource or whatever. So I do think that we have room to improve in terms of all of us being involved in the community. And that's just a transition thing for us because Susan is retiring. And we're a little short-handed right now. But as we look, when Susan retires at the end of June, we are in this position to hire a new person. And we've always kind of earmarked that to be a comms person, how we define that could evolve, but it would likely include our discussion boards and our social media and our marketing. So we recognize that we have some work to do in that realm. But we all kind of get in and take, you know, ownership of it.

Susan Murray 19:08

Coms person, what does that mean?

Christina Lewellen 19:12

Oh, sorry. Communications, like marketing communications. Yeah.

Susan Murray 19:17

Okay, great. Yeah. And I didn't know if those other examples on those on the board, have you thinking like, oh, I can think that this is something that's really you know, an example of how

you have almost like a gold standard discussion or exchange that you're very happy with the way that kind of came out on the access point.

Christina Lewellen 19:38

Just pulling up, like, kind of our recent posts

Susan Murray 19:43

yeah, like, we...can include screenshots in our report, and just to give some, you know, demonstrating things that are particularly you're sort of like how that maybe has been,

Christina Lewellen 19:56

You know, I think that um, a lot of times, the technical questions tend to get a lot of activity, because the folks who are posting them are asking a very specific question, like, you know, I'm doing this project, what would you do? Or if you're a Google school, how do you address this? Sometimes we've had discussions bubble up around, you know, titles. And well, who do you report to, and things like that. But a lot of times where the most energy is, is around technical answers and solutions, like, you know, Blackboard, or over what my goal is, and what my hope for the future for these boards are, is that the discussions that get the most energy are those that are strategic right now. They're very technical. I think that what we try to do as a staff is try to plug in like, Hey, are you concerned about Russian attacks, we're trying to get them to think out, like pull them out of their day to day, and get them to think kind of big picture. But this is an evolution that is not just an ATLIS, this is an evolution of technology leaders, and independent schools, because the role is changing, you know, the role used to just be wires and cables, and

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my printer doesn't work. That is not what the role is anymore. And in some schools, the

technology leader, whoever he or she, or they might be, in some cases that individual is, is

thinking, what, like bigger picture, and in some cases, they're just not. So it just varies from

school to school. And so I would love to see that, you know, for me, you're asking like, you

know, kind of what is an ideal? I think that I don't know that I've seen one, because for me, what

would be ideal is a strategic conversation that is big and in depth. And, and the answer, the final

post would be, wow, I hadn't thought about that. I'm gonna go work on this with my team. That

to me would be a huge win. And I don't know if we're there yet. But it's important that we create

the space for that to happen as not only ATLIS grows, but as technology leaders as a profession.

As that grows, we've created this home for it to happen, you know, so it might not be there yet

consistently. But I'm hopeful that it will.

Susan Murray 22:13

Yeah, I mean, it's relatively new. It just started in the access points discussion board in July, right

isn't?

Christina Lewellen 22:20

Yep. Not even a year old?

Susan Murray 22:22

Yeah, it's very new. So yep. And one thing I do, I just had a question about what I read about

your partnership with CIRIS. Yep. And can you talk a little bit about that? I'm just because we

also talk about different, you know, online communities and how they work with other Online

Communities? And are they a competitor or like you guys have such a unique niche area? And I don't know, if you feel like you have competitors, or sort of I just was wondering if you can speak to that, and how the CIRIS fits into all that.

Christina Lewellen 22:55

Yeah, in the broadest sense, I do not feel like we have a direct competitor, I think that there are some what I would consider state and regional accreditation bodies, they tend to call themselves membership organizations, but really, their true existence is based on accreditation of independent schools. And they will sometimes offer a tech track or a tech webinar right to kind of check that box and address it. But what we ATLIS consider our role to be is that my last strategic plan from my board is so, so exciting to me, and we live it and breathe it every day. Because the role of ATLIS was kind of brought in to be like, yes, support the technology team, but also support the whole school and their technology strategy, and more broadly, support the entire community with technology expertise. And for me, that's why I don't feel like we have direct competitors. Because if let's say, you know, you know, we partner with Misbah, we partner with NBOA or we partner with a regional like I just flew to Hawaii, because the Hawaiian Association of Independent Schools wanted to have it their heads and trustees Summit, a presentation about how the heads should be thinking trustees should be thinking about technology. So they, you know, we went out there and we gave that keynote. So I really think that I don't think that we have competitors in the space that we're playing. And I think we, in fact, prefer to instead think of ATLIS as a partner with the other organizations in space. And I think that the other partners are starting to feel that because we're like, yeah, we can help you we'll do that. Then we also as a side note, and then I go to CIRIS we like, for example, our

cybersecurity Summit, rather than just offering it what we started doing is partnering with all the state and regional organizations where if they send their people to our cybersecurity sessions, we'll give them a rebate for their attendees. So they get to kind of promote that they're doing cyber, but they don't say that. Yes, yeah, cyber, like they freaked They're like, Oh my God, I don't want to talk about this. Right? They don't know enough about it. So it's been a lovely little approach in terms of being more of a coalition rather than competitors. Serious, so serious, the center of institutional research independent schools, was started by Eric Heilmann. He's a tech leader at Moray school in DC. And he was doing a lot of work in the realm of institutional research. There are some schools that have dedicated institutional research people like the data people, the dashboard, people, but very few. So in all likelihood, it's like someone in admissions doing it, or it's someone in advancement. Or maybe even someone on the tech team. But because as Eric and I were exploring this partnership, I realized that the technology piece where the data lives is a big part of how to present the data, right? So the institutional research people who, whatever role they have, and the technology, people need to be working together to gather that data, sometimes from disparate sources throughout the, you know, the school ecosystem of technology. And so we really wanted to talk about how tech and IR kind of clicked together. But at the same time, I don't want Eric or CIRIS to think that ATLIS is trying to gobble up the institutional researchers that are out there, right. So I said, Why don't we partner up on this and CO locate an event where you have a whole track of content that is specific to institutional research. And our tech people, I think, are going to love that. Like, I think they're going to want to gobble it up? How can I help? Or how can I do it? And because there isn't really a defined home for institutional research. So the way I look at CIRIS in a lot of ways they are today where ATLIS was seven years ago, they didn't really have a home, they didn't really have a group. And

so I have basically opened the door of ATLISes resources and said, you know, if you want to have a track at our event, come on in if you want to have a webinar, and let's do it together. So we're kind of partnering, because we think that that Venn diagram is so wickedly overlapping. So it just makes a lot of sense for us to be great partners with them. So that's our relationship. Does that make sense?

Susan Murray 27:21

Yeah, no, that's great. We have like two minutes left. But I really like your whole, the overview and the thought of being collaborative, but everything, it just is such the nature of technology professionals, in my opinion, like we always want to help each other. And as a group, like we always I just really liked the whole vibe of ATLIS. And I'm just very happy to see it. Because in the beginning, I mean, I think I am not a member, it's a little too pricey. For my school, I keep thinking, Oh, should I try to ask, but I was actually going to see if I could, I don't know if they need volunteers. And maybe I'll go down to the Florida event and see if I can volunteer something. But anyway, I just really appreciate the fact that you've invested in it definitely shows and my experience as sort of like an end user and I was happy to be able to do access points without having to have my school be a member. And it's really great. I think you're doing some really good.

Christina Lewellen 28:21

Yeah, and if I mean, just real briefly, I'll just say that, to speak on that we recognize that the model is something I inherited from the business model around our association, the per student fee, we recognize that that is a very independent school, like it's how MBA works. That's how

NDIS works. It's how ATLIS works. However, what we constantly try to do is make sure that we take what we can leverage from membership dollars and create community wide resources, it's not always going to be that way. So it's not always going to be we recognize that if you are either a smaller or less resourced school, you may not either be able to afford or be able to justify affording being a member of ATLIS, there is a certain part of the ATLIS community that you can still find a home in. No, does it mean you know, we don't have free registrations for conferences, you know, we don't offer you know, if you're non member, you will pay a premium. So we have to make sure that the members aren't subsidizing everything for the community. I think that there's a healthy medium there. So for example, this isn't specific to your research, but we have an ATLIS 360 as a self study guide. It's basically like what you're doing right now. You're going through and you're putting a strategic lens on your technology like okay, is this where we want to go? The 360 Guide is almost like an accreditation for technology, though it is not an accreditation, it's sort of formed like that it has prompts and guiding questions in like different areas of technology, technology for operations technology for the classroom, right. And so we recognize that if we were going to advise schools in this ATLIS 360 self study guide, you know, you really ought to have an incident response policy, you really ought to have user policies for your teenagers and your littles or whatever, right? Like we were going to advise as a community, that this is what healthy technology looks like in independent schools. We recognize that not all small schools can just go hire a lawyer for an incident response policy, like, we had to provide some templates and resources. And so we are less than 30 days away from launching a brand new product. And it's a companion manual. It's a textbook, basically, that goes with the self study guide, the self study guide asks the questions and tells you what you should have. The companion manual gives you examples of all of the things that we recommend. So that's to get to

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your point. And the reason I just wanted to share this is that yes, we get that you might not be

able to afford. And at the end of the day, if you come to conferences or non-member, you are

going to pay a little bit more. But what we do is we try to take those membership dollars and

invest it in really big projects like the magazine, like the community discussion boards, like this

textbook, this companion manual, it costs us a ton of money to design and develop that and pay

the ghost writer to get it pulled together. But what we did was we created that now at the end of

the day, as a non member, you might pay X dollars more than a member to get that book but the

membership paid to create it. So we try to keep a really balanced approach to creating resources,

but then try to make them as accessible as we can for those who cannot afford the membership.

Transcribed by https://otter.ai