

Justice-Oriented Lurking: How Educators Lurk and Learn in the Marginal Syllabus

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Equity

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Lurking

Annotation

Social Reading

Educational Equity



This case study examines interviews describing the experience of social reading and lurking as a form of informal learning. This study details the ways educator lurking occurred in the Marginal Syllabus, a public informal learning community that discusses educational equity topics, implications for literacy education, and digital pedagogy. Strategies are offered for instructional designers to optimize social reading and lurking practices for informal online communities that challenge dominant cultures and educational narratives. Research on social reading and lurking as informal learning is needed to leverage informal online communities to dialogue about educational equity and more just learning futures.

Introduction

Reading online is a social practice. Digital social reading allows readers to take advantage of features and affordances of everyday technologies – from websites and blogs to social media, to peer-reviewed scholarship – to converse, comment, and connect among larger communities of readers (Cohn, 2021; Pianzola, 2021; Reagle, 2015). The everyday social practices of reading with other people online enable activities that educators, in particular, participate in as part of online communities that are not “structured in terms of time, space, goals and support” (Kyndt et al., 2016, p. 1113). While (digital) social reading can be considered less formal, as it does not necessarily require institutional support or alignment with organizational structures, associated repertoires of practice are evident in emergent forms of knowledge construction, collaborative skills, and attitudes (i.e., Chen, 2019; Eraut, 2004; Kalir, 2020) that are professionally relevant and may be strategically incorporated across both academic and civic settings (i.e., Avila & Pandya, 2013; Hollett & Kalir, 2017; Jenkins et al., 2016).

Social reading is an important aspect of peer-to-peer learning that occurs within informal online communities. Our interest for this article is in educators’ participation in these communities – sometimes referred to as professional learning networks (Trust et al., 2016) or affinity spaces (Gee & Hayes, 2012) – and how educator social reading is

relevant to ongoing professional learning. With the growth of informal online communities, educators more regularly participate in peer-to-peer learning through digital and social reading practices as they make use of professional learning networks (Trust et al., 2016), leverage social media platforms like Twitter for networking and resource-sharing (Carpenter, 2015), and join in other online affinity places like MOOCs (Jones et al., 2016) that are professionally relevant. Amidst considerable scholarship about digital literacies and related learning practices, both within and outside of academic settings (i.e., Turner, 2019), there remains a need to further examine how educators' social reading practices online contribute to cross-context professional learning.

Participation in informal online communities, including educators, have a range of socially situated literacy practices, from reading and writing during Twitter chats to play during online gaming (i.e., Novak, 2017). One challenge for such communities is creating both an environment and opportunities whereby peripheral participation, as with activities sometimes described as lurking, lead to other forms of more robust social interaction. Lurking is typically defined as an individual activity, or:

A form of online behavior found in online/digital environments and has always been a very popular activity among online participants as it leaves no trace and is made possible by the technology that allows access without being visible or having to publicly participate. (Edelmann, 2017, p. 282)

Although often perceived as a solitary and disconnected practice, lurking is an important aspect of participation in online communities with implications for informal learning (Bozkurt et al., 2020). Lurking in online communities has also been described as the ways in which a new participant "enters, observes, and learns the culture and the norms of the environment as well as the tools provided" (Dawley, 2009, p. 118). This article suggests a more direct connection between lurking and social reading practices whereby certain online literacy practices are understood as a form of lurking. More specifically, lurking includes the social reading of online conversation and commentary created by participants in online communities (Cohn, 2021; Pianzolla, 2021).

The relationship between lurking and social reading practices is not only germane to participation in informal online communities, it is of particular importance to better understand how educators join, make sense of, and interact with groups expressly committed to educational equity and justice-directed learning. In informal online communities, lurking as social reading is an important first step toward professionally-relevant learning about topics of educational equity and future justice-directed practices. Accordingly, this article presents a case study addressing the question: How do educators describe their experience of lurking, and their relationship of lurking to social reading, in an online community that discusses educational equity?

Methodology

Research Design

Educator lurking, social reading, and informal learning has seldom been investigated in the context of an online social community expressly concerned with issues of educational equity and justice. Accordingly, we adopted case study methodology (Yin, 2014) as an appropriate means to describe the relationship between lurking, social reading, and educators' professionally relevant yet informal learning. Our case is bound by educator participation in the Marginal Syllabus, an online social community that, since 2016, has sparked and sustained conversation about educational equity through collaborative partnerships with the National Writing Project, the National Council of Teachers of English, and the annotation organization Hypothesis (<http://marginalsyllab.us/>). Social reading in the Marginal Syllabus occurs through educators' use of social annotation (SA), or the addition of multimodal notes to digital texts for the purposes of discussion, information sharing, knowledge construction, and meaning-making (Zhu et al., 2020). During Marginal Syllabus activities, educators collectively read scholarship about educational equity topics such as whiteness and privilege, racial justice in literacy curricula, and youth activism. Educators also read SA written by other participants who contribute to online discussion located in the margins of these open-access texts. To date, 62 partner authors have provided the Marginal Syllabus with permission to feature 41 texts for educators to read and annotate, over 600

educators have participated in the project since 2016, and participants have written more than 4,700 public Hypothesis annotations for others to read and discuss. Our interest in this case—with lurking, social reading, and informal learning—is a useful complement to prior Marginal Syllabus research that has examined how this online social community enables educator civic writing (Kalir & Garcia, 2019), ethical debate about digital literacy (Kalir & Dillon, 2019), and collaborative epistemic expressions (Kalir, 2020a).

Data Collection

The data collected for this case study were drawn from a series of interviews conducted with 26 educators who participated in the 2018-19 Marginal Syllabus. Interviews took place online via Zoom. The second author (Kalir) interviewed each educator for approximately one hour. All interviews were recorded, and the audio subsequently transcribed for analysis. As the Marginal Syllabus community has grown, interviewing has served as a regular and useful means of engaging with educators to better understand their participation in social reading and SA as a public, social, vulnerable, and critical professional learning activity (Kalir, 2020b). The featured interview dataset has provided data for a prior analysis of educator collaboration as open learning (Kalir, 2020a). In this case, we examined educator responses to a single question about the public writing, curation, and reading of SA during Marginal Syllabus activities. Responses to this question by eight educators were explicitly relevant to our concern for lurking and social reading activities, and amidst this subset of interview data we identified 31 excerpts for our analysis. Table 1, below, provides basic demographic information about the eight educators whose interview data were included in this study (all names are pseudonyms).

Table 1

Demographic information of educators included in case study

Name	Gender	K12/HE	Discipline	Career Stage
Karine	F	HE	Teacher Ed.	Mid
Tess	F	K12	Literacy	Early
Lester	M	K12	Literacy	Veteran
Teresa	F	HE	Teacher Ed	Veteran
Nannette	F	HE	Composition	Veteran
Kent	M	K12	Literacy	Veteran
Nina	F	HE	Literacy	Veteran
Kallie	F	HE	Learning Technology	Mid

Data Analysis

We analyzed excerpts from educator interviews using two complementary and inductive methods – first, classical content analysis followed by critical discourse analysis – to better understand how educators described their lurking and social reading practices during Marginal Syllabus activities. In our first analytic pass, classical content analysis (Berelson, 1952) was used to identify a set of five characteristics relevant to educators’ social reading. Interview excerpts were inductively coded and revealed characteristics of vulnerability (24 code occurrences), lurking (14), access to other people (10), professional learning (8), and critical media literacy (7). For example, one Marginal Syllabus participant, Teresa, spoke about the presence of vulnerability when social reading (“I feel vulnerable in that space”), the importance of accessing other people’s thoughts via SA (“learn from their perspectives”), the value of social reading to critical media literacy (“these topics around critical media literacy are just super relevant right now”), and the general importance of social reading to professional learning (“a focused exploration of a core text”). Employing classical content analysis allowed us to ascertain key themes in our data regarding the qualities and value of social reading as a form of educators’ informal learning.

Our second analytic pass used a socio-cognitive approach from critical discourse studies (CDA) with a triangular analysis of the transcript (Van Dijk, 2016) to further clarify the ways in which educator lurking and social reading may have been informed by perceptions of power. This approach specifically looked at systemic power dynamics (Wodak & Meyer, 2016). Given that educators read and discuss scholarship about educational equity and justice during Marginal Syllabus activities, it was appropriate to extend our prior analysis of educator interviews using a second method attuned to the dynamics of power in social discourse as reflecting broader socio-political structures. The critical stance of the Marginal Syllabus aligns well with the “critical attitude” (Wodak & Meyer, 2016, p. 6) of CDA as this method can help to reveal patterns in discourse associated with “subjugated knowledge against dominant knowledge” (Wodak & Meyer, 2016, p. 7).

CDA afforded analytic insight about aspects of power in educator discourse such as the use of pronouns, identification language, self versus other descriptions, expressed activities, expressed or implied norms or values, and stated interests in resources (Van Dijk, 2016). More specifically, we examined the “microstructure” of educators’ personal learning through mention of pronouns, identification, and emphasis of self-description (Van Dijk, 2016, p. 73), as well as the “macrostructure” of “activities, norms and values and interests” (ibid, p. 74) in which they participated in the Marginal Syllabus as professional learning. Use of CDA to analyze educator interviews for evidence of lurking and social reading behaviors surfaced, for instance, tension between the benefits of personal learning and the vulnerabilities of public professional learning activities. For example, Nannette stated, “I have to overcome some serious anxiety to put it out there. As much as it is anxiety inducement for me, that’s, for me, a personal issue that I keep wanting to challenge myself to overcome.” CDA also afforded the ability to analyze how participants looked at inherent sociopolitical power considerations amidst group-level and public professional learning such as with Kent, who stated, “We’re worried that folks would feel alienated when we’re talking about issues of DACA [Deferred Action for Childhood Arrivals policy] youth who are fighting for their rights and whether or not they’re even considered part of the civic conversation.” CDA revealed how some educators – particularly those who were new to social reading and SA activities oriented toward educational equity and justice – grappled with insecurities, expression, and participation amidst broader ideological dynamics.

Findings

Findings suggest participation in the Marginal Syllabus encouraged educators’ social reading practices, and this form of lurking may be explained by two themes. The first theme of *personal learning* described qualities of educator comfort and value when learning about educational equity and justice through social reading in an informal learning community. The second theme of *professional learning* described potential contradictions, vulnerabilities, and potential professional risk associated with contributing to public discussion about educational equity and justice in an informal online community.

Social Reading and Lurking as Personal Learning

We found through analysis of the interview excerpts a primary discourse of self which was relevant to the theme of personal learning through social reading. Self-discourses were characterized by educators’ repeated use of “I” to describe their lurking behaviors and descriptions of personal thoughts and reasonings for individual actions. Additionally, self-discourses addressed the microstructures of individual social network access and formation, or how they joined the Marginal Syllabus, acquisition of new knowledge and perspectives, and evolution of the self—or perceptions of their participation in the project.

In the Marginal Syllabus, participants saw lurking as a way of learning without risk of unnecessarily exposing themselves. As Nanette shared, “I’m a voyeur, because—I don’t know—there is something about putting something out there that might never disappear.” Educators considered lurking as a legitimate way to initiate involvement in the community or, as Teresa stated, “It’s an entry point, and it’s still valid.” There was noteworthy discussion by participants of other educators who they also believed may be lurking in the Marginal Syllabus as informal online learning. One such example was mentioned by Kallie, who observed, “I’m sure there are teachers that are reading what’s going on, but not

taking the step into the margins to become part of that conversation.” Similarly, another participant, Lester, discussed his lurking behavior in the context of colleagues:

I think some teachers would see the tension as, “I’m not ready to do that, even today,” so they don’t get engaged in that conversation. They might read it—I bet you, I’m sure you can track reading, and stuff like that. I’m sure there are teachers that are reading what’s going on, but not taking the step into the margins to become part of that conversation.

Throughout educators’ interviews, there was a commitment to learning more about equity in education alongside recognition that voices and perspectives were not being heard despite multiple participation pathways in the Marginal Syllabus. Kallie stated, “I think a lot of people whose voices do matter and should be part of the conversation aren’t necessarily in there because they’re not always convinced that their voice matters as much as other people’s do.” A related tension that educators expressed consisted of wanting to learn while publicly managing their ignorance of certain topics from others while they continue to grow as individuals. Teresa stated, “Because it’s open and because I feel vulnerable in that space, I don’t always ask all of the questions I would ask because I’m not sure that any space is a safe space to ask them for me right now.” Even when educators felt that as though they did not have the time to participate in the Marginal Syllabus’ annotation activities, they felt the project’s featured scholarship was important to read in a social context for their personal learning.

Social Reading and Lurking as Professional Learning

In contrast to personal learning as enabled by social reading, educators also described how professional learning opportunities and tensions were evidenced in more public discourses as characterized by general references to “others,” or other participants of the Marginal Syllabus community with more knowledge. Lurking discourses of “others” addressed the macrostructures of navigating network access to more knowledgeable others, avoidance of traditional network gatekeeper mechanisms, and determining one’s fit within the learning community. CDA methods, in particular, allowed us to describe how Marginal Syllabus participants viewed professional power, or the “knowledge, status, fame and access to public resources” (Van Dijk, 2016, p. 71), present in social reading and SA activities.

One aspect of professional learning, and broader dynamics of professional power, concerned how Marginal Syllabus participants perceived complex feelings of ignorance and vulnerability. For example, the complexities of joining, reading, and also participating through annotation in the larger public professional group was illustrated by Nina, who commented:

I also am thinking out loud right now about the fact that sometimes there’s risk involved with these kinds of things. If you write, there’s a certain way in which that writing is given to a broader public, but you don’t necessarily want to see everyone’s thread of thought on everything you’ve ever said.

Throughout educators’ interviews, lurking discourses of “public” and “professional learning” reflected macrostructures of social status as new participants navigated the Marginal Syllabus’ network and voiced trepidation about being judged by established project participants. For instance, one participant, Teresa, stated, “Many of the people who come are people who do have more of a background in the topic than I do,” which suggested feelings of vulnerability due to a perceived lack of knowledge. Additional concern about participation insecurities and professional vulnerability was related to the educational equity topics discussed in the Marginal Syllabus. One participant, Kallie, explained:

I have that theory that teaching is a public act, yet I sit there and censor myself sometimes and really have to decide what I will put out there and what I won’t. Sometimes I think that’s a good thing. We all need to make those private-public decisions, but there’s definitely been times where I’m like, “Ooh. That’s a tough conversation,” or “That seems a little,” I hate the word sensitive, but “sensitive,” and “Do I put that out there right now?”

As participants navigated their social reading and degree of public participation, professional learning complexities surfaced at the intersection of lurking, vulnerability, and access to a useful online community relevant to educational

equity.

A second quality of professional learning concerned the challenges of transitioning from anonymous social reading to attributable SA. As educators switched from being solely a lurking social reader to an active contributor through annotation, participants did connect with a broader network whereby information and perspectives flowed in multiple directions. As Teresa described it, “I’m thinking from a professional learning perspective with the opportunity to connect to other ideas . . . [I’m] learning a lot by learning from others.” Yet, there was also fear of judgment based on the public nature of discussing educational equity topics as evidenced in statements from Karine like “I’m a little more careful with my words if I know I’m gonna put it out publicly.” Many Marginal Syllabus participants acknowledged grappling with discussions of racism, intersectionality, and critical approaches to justice-directed learning for the very first time. For a participant like Kent, who had more self-described experience examining equity in education, the transition from social reading to SA was difficult, too, as when publicly discussing civic education, he’d say “I spent a lot of time wrestling with even using the framework of civic engagement and talking about citizenship”. However, once Marginal Syllabus participants moved from lurking to SA, they did express feelings of agency and power associated with that act of contribution. As Kallie reflected:

Once I really do kind of turn on that active engagement switch, it is almost hard not to wanna comment because I just—as someone who’s been actively reading for a long time, I can’t read anymore without writing or I can’t read anymore without thinking about what I would say or what I would highlight in response.

Despite reporting how lurking was connected to feelings of personal vulnerability, Marginal Syllabus participants also reported SA in this informal online learning community was valuable. There was a point whereby each educator bested feelings of vulnerability and moved from lurking as social reading to actively writing SA and extending the project’s public discussion of educational equity.

Discussion

Our case study of participation in the Marginal Syllabus investigated how educators described their experiences with lurking and social reading in an online community that discusses educational equity and encourages justice-directed professional learning. Based on our findings, our discussion first considers the importance of encouraging educator participation and agency in online communities as professionally-relevant learning. Then, we discuss how to effectively design informal learning spaces and activities for educators interested in educational equity and justice, as well as possible participation pathways from lurking to broader practices of connectivism (Siemens, 2004) and social network knowledge construction (Dawley, 2009). Our case informs a set of recommendations for instructional designers interested in leveraging online social communities for informal, professionally-relevant, and equity-oriented learning. Last, we offer recommendations and implications for designers, particularly when lurking behaviors may describe initial and ongoing participation in educational justice communities.

Informal online communities for educators, like the Marginal Syllabus, extend what is considered legitimate peripheral participation (Park, 2015; Wenger, 1998) in that membership and meaningful contribution does not require spatial co-location, formal registration, or credential. Our study of educator lurking behaviors, like social reading, suggests professionally-relevant opportunities may be encouraged as alternatives to compulsory professional development often required for educators. Lurking is an act of agency whereby participants are invited to read together, share perspectives, disseminate resources through channels and networks of their choosing, and not be constrained by the formal expectations or political pressures of their workplaces. Nonetheless, our interviews with educators also suggest their social reading practices were associated with perceptions of vulnerability, potential participation risks, and deliberation about how to thoughtfully contribute to public discussion. Accordingly, we recognize complexities of power defined social reading practices as a form of legitimate, and agentic, participation in a justice-directed online community like the Marginal Syllabus.

As learning designers, we are also interested in how our insights about lurking and social reading may be applied to help guide educator participation in professionally-relevant and equity-oriented learning. First, learning designers can help educators identify appropriate networks for social reading and make suggestions about how to *read* – literally, socially, and symbolically – informal online communities relevant to their professional interests and goals. Second, learning designers can effectively facilitate this process by being lurkers within the community (Lai & Chen, 2014), by evaluating the amount of engagement typically required, as well as by determining how new participants are welcomed into the community. Third, learning designers can pay attention to the tools and practices used within the community to encourage initial social reading and subsequent forms of participation. For example, social reading may be encouraged through easily accessible FAQs, or short videos featuring community leaders describing the culture and norms of the community. For informal online communities focused on educational equity and justice, a glossary of commonly used terms may also be useful to help newcomers feel welcome and knowledgeable enough to move from lurker to contributor. Learning designers might also create discussion questions that attend to community building and nudge the lurker to make their first post or annotation. Our case suggests learning designers with expertise creating engaging participation in online environments can collaborate with (informal) communities of educators to encourage and support activities relevant to justice-directed learning.

Learning designers are uniquely positioned in guiding educators to identify and join informal justice-oriented learning communities, and to help with the technical and social design of the communities. McNeil (2020) wrote that “lurking can be a waiting room before communication, in brief delay like the brutal clang of an old dial-up modem sound, a moment to pause and prepare oneself for an exchange with others” (p. 4). Learning designers could consider where there is the potential, or at what moments, for lurking to turn into engagement in an informal online learning community. We further recommend that learning designers—who are not often involved in the outreach, communication, or informal marketing of these online communities—become involved during the conceptualization phase. Learning designers, who as part of their profession regularly look at systems and delivery mechanisms, should be brought into early discussions about the audience for the informal learning community, how educators can identify with the community (Dawley, 2009), and advise on how to launch the informal learning community. These processes may be facilitated through social media and established professional learning organizations. Learning designers can also help informal social networks analyze participant characteristics, and identify the participation constraints of lurkers whose greatest anxiety may be public vulnerability.

Implementing these recommendations will present some challenges for academic, open education, as well as corporate learning designers interested in supporting lurkers and creating pathways for social reading as personal and professional learning. For instance, participation options might need to prioritize the ability of community members to remain anonymous or not publicly recognizable. Rather than setting standards for participation or, in more formal settings, the assessment of learning objectives, lurking should be encouraged for participants who have time constraints and for participants who only feel comfortable reading without writing (or other forms of social interaction). After helping introduce the informal learning communities, learning designers can also build small activities that allow participants to safely lurk. For example, webinars held synchronously, and then recorded and distributed, whereby learning materials are contextualized by more knowledgeable community members. This could open pathways for lurkers to understand content more deeply and potentially transition from individual reading to more social commentary and other public contributions. Additionally, learning designers can help create environments in which learning is not only socially constructed but also builds online connections to nodes of knowledge (Siemens, 2004). To do so, learner designers must understand possible participant needs within informal learning communities as different from academic courses or corporate training contexts in which lurking is often not an acceptable learning behavior. Informed by insights from this exploratory case study, learning designers can leverage social reading and lurking practices as informal learning to further enable online communities to dialogue about educational equity and more just learning futures.

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