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5.1.   Prelude

Curiosity as restless questioning, as movement toward the revelation of something hidden, as a question verbalized or not, as search for clarity, as a moment of attention, suggestion and vigilance, constitutes an integral part of the phenomenon of being alive. There could be no creativity without the curiosity that moves us and sets us patiently impatient before a world that we did not make, to add to it something of our own making (Paulo Freire, *Pedagogy of Freedom*).

5.2.   Summary

With the emergence of technology and the increased demand for online courses, traditional classroom facilitators, instructors and trainers are nervous, reluctant and sceptical to teach in the online environment because they do not know what is expected of them. Although used as a fun exercise, the Paradigm quiz in Annexure A corroborated this fear because traditional facilitators, instructors and trainers did not grow up with powerful technologies and they were not prepared for a world of constant change (McCain & Jukes, 2001). Furthermore, Taylor (2002) and Choden (2001) issue a warning to instructors to face the challenge. This means in effect that some trainers will make the change while others may be forced to look for another job. Learning and performance improvement is what is important and trainers and instructors need to utilise the technology in the delivery of learning interventions and to perform optimally in their jobs (Rosenberg, 2001:311). Our skills and knowledge need constant development if we wish to keep up with new technologies and trends.

The research problem was to establish what different roles the online facilitator played in the online environment as well as to identify competencies for the roles.

This study focused on the following research question:

What are the roles and competencies of an online facilitator?

In order to find an answer to this question, the following subsidiary questions were asked:

- How did the facilitator adjust to the online environment?

- How did the online facilitator 'talk' to the learners and encourage dialogue with the learners?

- What roles did the online facilitator play to be 'visible' in the online environment?

- What challenges did the online facilitator face?

- What people competencies were identified for the online environment?

- What thinking competencies were identified for the online environment?

- What energy competencies were identified for the online environment?

Chapter 2 explored the literature pertaining to the various subsidiary questions. A literature study did not fulfil the requirements of identifying this new set of skills for the online facilitator and it was necessary to conduct a case study to establish what really happened during the facilitation of an online course. Similarly, a literature study could not provide sufficient information on the competencies to operate in the online environment. From information retrieved, a conceptual framework was established for each subsidiary question so that the researcher could focus on specific concepts and parameters when analysing the results.

Chapter 3 presented the detailed research design, which was in the form of a case study because an in-depth understanding of the facilitator in an online situation needed to be gained. A specific online case was explored over a six-week period through detailed in-depth data collection involving multiple sources of information, rich in context (Creswell, 1998). The basis for this instrumental case study was the 2002 ORO 880 online module on eLearning for the Master's degree in Computer Assisted Education. The module simulated the popular reality television series, *Survivor*, using the same rules and events

as in the television series – the location just shifted to cyberspace. The name was adapted to *CyberSurfiver*, with an emphasis on 'surf' to indicate that 'surfing' the Internet needed to be done to get to various locations. A specific online facilitator was selected because she had experience in teaching and facilitating online classes. She was also one of the students who obtained a distinction for this module in 1998 and had experience of the demands of this module. She was particularly interested to facilitate this module for personal development reasons. Observer participant observation, various written texts, a face-to-face interview and a group focus interview were selected as data collection methods.

Chapter 4 presented the findings of this researched case study, which was designed to arrive at the answers to the subsidiary questions. Collectively, the answers contributed to answering the research question.

5.3.   The answers to the subsidiary questions

The section provides the crux of each answer.

5.3.1. How did the facilitator adjust to the online environment?

The adjustment to the online environment was based on good planning and lateral thinking. Firstly, the online facilitator created a safe virtual environment for the learners and provided pre-selected communication tools so that the learners could operate in the virtual environment. She then formed an online community to ensure that social interaction could take place between the learners to create a sense of belonging. Teamwork was accentuated to drive collaboration. The online facilitator deliberately put resources in place to guide the learners on their learning paths. These resources were *inter alia*, course guidelines, clear learning outcomes, vital URLs, notifications and reminders.

The online facilitator also had to make adjustments in terms of her facilitation approach. She was responsible for setting the mood of the learning intervention at the initial face-to-face contact session. She was flexible in terms of individual assignments. She provided time for intellectual discourse as well as time for learners to reflect on their learning experiences. As online facilitator, she created situations in which learners felt safe to question and reflect on their own processes, either privately or during group discussions. The online facilitator remained alert to expressions indicative of deep or strong feelings and in these instances she provided emotional support and also reflected on the particular situation, often acknowledging her own limitations in related circumstances. The online

facilitator had to have a caring persona as she operated on the side in a learner-centred online environment.

5.3.2. How did the online facilitator 'talk' to the learners and encourage dialogue with the learners?

The online facilitator was aware of the fact that 'talking' only happened via text messages and that, in the absence of body language and tone of voice, the online facilitator was particularly conscious of the power of the written word. The online facilitator established a relaxed and supportive online environment and the learners knew that they could talk freely and at length, knowing that the online facilitator was there for them at any time. The online facilitator 'listened' to all the talking that the learners were doing in the form of dialogues, conversations, discussions, debates and arguments in order to provide guidance and support. At no stage did the online facilitator dominate the group discussions and she admitted that she only 'talked' when questions were directed at her specifically. When 'talking' to the learners, the online facilitator provided supportive and comprehensive feedback to each question, and even providing additional information at times. The online facilitator displayed 'facilitator finesse' by incorporating humour and emoticons in her discussions with the learners. She never lost control of the group and remained calm and relaxed. The online facilitator 'listened' and 'talked' to all the learners in a very personal way.

5.3.3. What roles did the online facilitator play to be 'visible' in the online environment?

Five roles were selected to enhance the visibility of the online facilitator. As **administrator**, the online facilitator conducted timeous course administration. As **social supporter**, the online facilitator maintained social and emotional support in the group. As **instructor**, she facilitated the learning process. As **guide**, she encouraged interactivity to foster the building of new knowledge. As **mediator**, she ensured fair play within the group.

5.3.4. What challenges did the online facilitator face?

The challenges faced by this online facilitator were less than the nine challenges listed in Chapter 2, but the challenges were not that different from what had been experienced by other online facilitators. In Chapter 4 the online facilitator provided clear solutions how to avoid similar challenges in future.

The online facilitator experienced two major challenges whilst facilitating this online course. Firstly, the learners needed support apart from the course work support provided by the online facilitator. The online facilitator felt that valuable facilitation time was spent on helping learners with administrative and technical queries. While the online facilitator took it for granted that the learners would have had a minimum level of computer proficiency when entering for the course, this proved to be inaccurate. To minimise this problem, the online facilitator suggested that a short training session, prior to the beginning of the course, might be held in a computer laboratory to introduce potential learners to the various eLearning tools.

Secondly, the online facilitator had to cope with various conflict situations. Learners complained about the time and the expense of having to be online. The online facilitator provided an alternative for these learners by inviting them to use the computer laboratory at the university. In future, this problem probably could be solved with the signing of a learner contract at the beginning of the course. In this contract the learners would be informed about three undertakings they would have to make in terms of time, effort and money. In future, the online facilitator suggested that she would be more explicit in providing logistical guidelines so that the learners would know what would be expected of them.

The online facilitator effectively managed the conflict within the groups and dysfunctional teams and made adjustments to assist individual team members. In other words, she provided continuous social and emotional support to the distraught learners.

The learners experienced the online assessment as stressful. The online facilitator effectively managed this conflict situation by explaining to the learners why it was necessary to experience the stress of an online test.

Although some learners felt that the online facilitator did not provide constructive feedback, the rest of the group clearly indicated that the course was not about 'product', but about the 'process'. If assignments were successfully completed, there was no need for feedback.

5.3.5. What people competencies were identified for the online environment?

The identified 'high' and 'extreme' people competencies were *inter alia*: motivating others; developing others; interpersonal sensitivity; teamwork; building and maintaining relationships.

5.3.6. *What thinking competencies were identified for the online environment?*

The identified 'high' and 'extreme' thinking competencies were *inter alia*: judgment; information gathering; problem analysis; written communication skills; technical skills and competence.

5.3.7. *What energy competencies were identified for the online environment?*

The identified 'high' and 'extreme' energy competencies were *inter alia*: self-confidence; persuasiveness and oral communication skills.

5.4. Discussion

Reflection or reviewing is learning from experience. I was in a fortunate position where I worked very closely with my supervisor. Our various reflective activities served a two-fold purpose. I provided input and then my supervisor made his contribution. Greenaway (2003:1) defined this reviewing process very aptly as follows:

- Sense 1: Reviewing = Learning. This is the process of learning from experience itself. One may, for example, keep a diary, confide in a friend or talk to one's mentor. Sense 1 is about what the *learner/student* does.

- Sense 2: Reviewing = Helping others to learn. This is the process of facilitating learning for others. Thus, for example, one may ask questions, give feedback or explore alternatives. Sense 2 is about what the *facilitator/supervisor* does.

When I got stuck at particular stages of the research process, my supervisor was there to provide guidance to move beyond this stage. Reflection helped me to clarify, achieve and celebrate objectives attained. Through reflecting, I received the sense that my supervisor cared. He was interested in my progress! Reflection was a valuable safety net for me. At stages I needed the reassurance that support was only a cell phone call or e-mail message away, especially late at night or over a weekend.

5.4.1. *Methodological reflection*

I am convinced that I explored and explained the world of the online facilitator in *CyberSurfiver*. What was gratifying was the fact that the transcripts of the focus group interview and the face-to-face interview corroborated what was produced in the actual text messages. I did not influence the initial data that was generated for this study. In fact, I did not even make contact with the online facilitator during the six-week period. This was

difficult for me because I had thought about various ways to assist the learners and I felt that the online facilitator might have benefited from my suggestions. I would also have appreciated the opportunity to find out how the online facilitator felt at certain stages during the six-week period. But being an 'observer as participant' meant that I had to go with the flow of the course. I was not allowed to take part in the activities – my only duty was to observe.

CyberSurfiver happened at a stage when I was extremely busy at work and at various times during that six-week period it was difficult to logon to *Yahoo Groups* and *WebCT* to observe what was happening. One evening I simply did not have the strength to tackle this job. To this day I regret that moment because I have subsequently learnt to place myself in a learner's position – what if it were I that had been a learner and I had posed a particular question that night that needed an urgent answer? Being an observer made me realise that whoever fulfilled the role of an online facilitator had to be a dedicated person who was willing to work extended hours under adverse circumstances.

It would have been interesting to observe this online facilitator in a 'team teach' situation, where two facilitators facilitated the course. Although this facilitator did use other resources, for example the *InterWise* technical crew, it was very much 'Linda's course' because of the way in which she had designed the structure and assignments for the course. This was a once-off course. But if the course had been repeated again and again, the online facilitator might have considered using guest lecturers as well, just to give the online facilitator some help. Perhaps I am over critical at this point, because this online facilitator mentioned in her face-to-face interview that she was not aware of the fact that she could have made use of a co-facilitator. However, she also acknowledged that she 'liked doing things her way'. It would have been an interesting exercise to observe a possible 'power play' between course facilitators in the online environment.

I do not think that the roles and competencies of the online facilitator would have changed in a case study with no competition or game element. I am of the opinion that the teams would have been less dysfunctional. The online facilitator probably would have a lesser mediator role to fulfil, although conflict is not necessarily linked to competition and games. Different personalities and work pressure can also cause conflict. In any online situation the online facilitator would have to fulfil the five indicated roles of administrator, social supporter, instructor, guide and mediator, because these roles provide visibility for the learners. Irrespective of the game element, the online facilitator would still need the selected people competencies, thinking competencies and energy competencies to function in the learning environment. Depending on the content of the course, the online

facilitator might not be as technically skilled and competent in the subject matter or the online facilitator could call upon a subject matter expert to co-facilitate a course. The online facilitator would then look after the learning process and the subject matter expert would concentrate on the specialised course content.

In any learning environment the online facilitator would still motivate and develop learners and be interpersonally sensitive to the dynamics of the group in order to promote teamwork and build and maintain relationships. Any learning is directly related to information gathering, problem analysis and making judgment calls. Irrespective of which didactical metaphor is used, written and oral communication skills will always be important to function optimally in any learning community. The stronger the technical skills and competence, the better the judgment and interpretation that could be made to guide the learners to new insights. Teaching online requires self-confidence, knowing that you, as the online facilitator, can persuade and motivate learners to learn and develop in order to acquire new skill sets.

In Chapter 3 I provided extensive notes on each data collection instrument used for this study. I also mentioned the disadvantages of each data collection instrument and focused on the corrective measures put in place to address the disadvantages. This is clearly reflected in Tables 3.7, 3.9, 3.10 and 3.11. The online facilitator did have permission to change to her mother tongue during the face-to-face interview. I did not realise how time-consuming it would be to transcribe the interview and then to translate it as well for the sake of those readers who do not read and write Afrikaans. There are many spelling mistakes in the exhibits used in Chapter 4. I did not correct any of the spelling or grammar mistakes and used the data as it appeared in the original text messages. The purpose of these text messages was not to check for spelling and grammar mistakes, but to encourage participation, share experiences and provide feedback.

Peer reviews were used to ensure trustworthiness and authenticity in this study. I found that the online facilitator and learners were slow in providing feedback on information sent to them to review. This frustrated me because I wanted to obtain 'sign-off' and get closure on a particular research question before moving on to a next section. I worked to a set schedule and had to obtain certain milestone dates in order to complete this study during 2004. The online facilitator and learners could not understand why the reviews were urgent. At the time of the peer reviews many of the learners were busy with their own dissertations for the master's degree and the online facilitator was in a state approaching panic because of her work pressure.

5.4.2. Substantive reflection

It is evident from the literature that the role of the online trainer is crucial in the learning process. Consider the impact of the following quotations on the training profession.

> *What is emerging most clearly from the technological explosion is,*
> *ironically enough, a refocusing on people* (Winer *et al.* 1999:891).

I agree with Winer *et al.* (1999). In my estimation, providing social support with a high degree of interpersonal sensitivity, building and maintaining relationships, gathering information, analysing problems, and having writing and oral communication skills would constitute a 'refocusing on people'.

> *The classroom will no longer be the default delivery system. … the*
> *synergies between e-learning and classroom learning will become*
> *more refined. There will be less teaching and more facilitating*
> (Rosenberg, 2001:121).

> *The ability of the facilitator to recognize which facilitation roles are*
> *necessary for them to play as the learning project progresses is*
> *another key component of successful telementoring facilitation*
> (Harris & Figg, 1994:3).

I concur with Rosenberg (2001) and Harris and Figg (1994). This study focussed on the role and competencies of the online facilitator to identify the crucial facilitation skills needed for the online environment.

> *Instructors are faced with steep learning curves. How good their*
> *online lessons become depends heavily on how they are able to*
> *adapt to the computer age* (Taylor, 2002:24).

> *e-moderators are the new generation of teachers and trainers who*
> *work with learners online … online teachers (e-moderators) need*
> *special training if online learning is to be successful and productive*
> (Salmon, 2000:1).

Instructors would only be able to adapt if they knew what the online environment looked like and what was expected of them when conducting online lessons. I am in agreement with Taylor (2004) and Salmon (2000). It is for this reason that Dewar and Whittington

(2000) also recommended that newcomers to online facilitation needed a prior course in the requisite skills.

> *The professors who facilitate the online courses seem to me to need*
> *to be active, involved, skilled, and knowledgeable well beyond their*
> *colleagues who inhabit the traditional classroom*
> (Langan, 1997:131).

Being 'active' and 'involved' would indicate 'visible' roles. Similarly, 'skilled' and 'knowledgeable' indicate a set of competencies for this position such as judgment, written communication skills, competence in technical skills, self-confidence and oral communication skills, as was reflected in the *Work Profiling System* report.

As is evident from the abovementioned quotations, the role of the online facilitator has been researched and reported on. Many articles (Anderson *et al.* 2001; White & Weight, 2000; Rykert, 2002; Dewar & Whittington, 2001; Murray, 2001; Barclay, 2001; Bentley, 1994) deal with the importance of this role and suggest reasons why the role is so strategically vital. A few attempts have been made to operationalise the roles (Berge, 1996; Ambrose, 2001; Broadbent & Legassie, 2002; Hootstein, 2002; Learning Peaks, 2001), but not to the extent of identifying five 'visible' roles with matched competencies to fulfil these roles.

The literature was very explicit about the differences between the classroom environment and the online environment, as I indicated in Chapter 2. According to the literature, the major adjustment in the online environment is the creation of learning communities. This was widely mentioned (Newton *et al.* 2002; Palloff & Pratt, 1999; Rheingold, 1994; Rourke *et al.* 1999; Peté *et al.* 2002; Picciano, 2002; Westera, 1999; Schrum & Hong 2002; Zimmer *et al.* 2002; Selwyn, 2000; Kaplan, 2002; Moller, 1998; Mantyla, 2000b; Ko & Rossen, 2001). I strongly agree with this adjustment, and the *CyberSurfiver* online facilitator also designed her module around collaborative learning and 'tribal' (group) assignments. The literature listed typical features of web-based environments that could be used in online courses, as is indicated in Table 5.1 (Kaplan, 2002; Harasim, 1993; Gunasekaran *et al.* 2002). When comparing *CyberSurfiver* to the examples provided below, it is apparent that the online facilitator did indeed provide the learners with the opportunity to experience a true web-based environment. I agree that the online facilitator should provide an easy-to-use collaborative environment.

Table 5.1:   Typical features of a web-based environment

Tools	Example	This study

Table 5.1:   Typical features of a web-based environment

Synchronous tools	Audio-conferencing	N/A
	Web-conferencing	N/A
	Video-conferencing	N/A
	Chat	✓
	Instant messaging	✓
	Whiteboards	N/A
Asynchronous tools	Discussion boards	✓
	Calendar	✓
	Links	✓
	Group announcements	✓
	e-Mail	✓
	Surveys and polls	✓
Content integration	Courseware	✓
	Streaming media	Learners' choice
	Narrated slideshows	Learners' choice
	eBooks	Learners' choice
Document management	Resource library	✓
	Version tracking and control	✓
	Permission-based access	✓

Murray (2001) stated that the people who need to make the biggest adjustment from the classroom environment to the online environment are the teacher, instructor and education staff (Murray, 2001). Although various authors reiterated the fact that this change involves moving from teaching to facilitating (Rosenberg, 2001; Duckworth, 2001; Hofmann, 2001a; Harris & Figg, 1994; Nichols, 2002; Rykert, 2002; West & Luetkehans, 1998; Taylor, 2002; Mazoué, 1999), I missed the person-specific indicators that identify this change. On a closer reading of the literature, it would appear that by creating and maintaining learning communities, the change to facilitated learning is complete. Duckworth (2001:2) states 'promote interaction'. Darling (2000:1) emphasises 'the class is the thing'. I disagree with this reasoning. There is more to online facilitation that just the creation of learning communities. The facilitator *per se* needs to show a willingness to 'change' to work in the online environment.

Online facilitation does not imply merely some minor adjustments in the qualities, attitudes, habits and activities that trainers and instructors require for face-to-face teaching. It implies possessing a different set of competencies. One of these 'competencies' would be 'interpersonal sensitivity' or a 'caring persona', as is noted by Hiss (2000). However, I disagree from her interpretation of control talk for the online environment. By being a facilitator, this person relinquishes the controlling function – hence my suggestion of the need for 'facilitator finesse' in the online environment when talking to the learners.

The online facilitator is juxtaposed. The online facilitator works from the side (so to speak), and no longer holds centre stage. He or she has to fulfil 'visible' roles such as those of administrator, social supporter, instructor, guide and mediator.

5.4.3. Scientific reflection

The researcher scrutinised the roles of the online facilitator in this study. The 23 roles indicated in the literature could not give a clear indication of visible roles that the online facilitator needed to fulfil. All the text messages that were generated throughout the course were processed in terms of the Blignaut and Trollip (2003) taxonomy of faculty participation in asynchronous learning environments. Once again, the Blignaut and Trollip (2003) taxonomy did not provide for 'visible' online facilitator roles. Using the Blignaut and Trollip (2003) taxonomy as a base line, I transformed the taxonomy into roles, taking into account how each category was defined and delimited. I was looking for indicators that would reflect visibility on the part of the online facilitator. I also considered what the learners and online facilitator had to say about the visibility of the online facilitator, and what steps the learners and online facilitator recommended to improve the visibility of the online facilitator. Five different roles were identified and five different coding schemes were designed. Thereafter, all the online facilitator postings in *Yahoo Groups*, *WebCT* and *Yahoo Messenger* were categorised in terms of the five visible roles.

The online facilitator, to be visible in the online environment, needs to fulfil the five roles that are indicated in Figure 5.1 under Facilitator roles.

Figure 5.1:   The five roles for the online facilitator
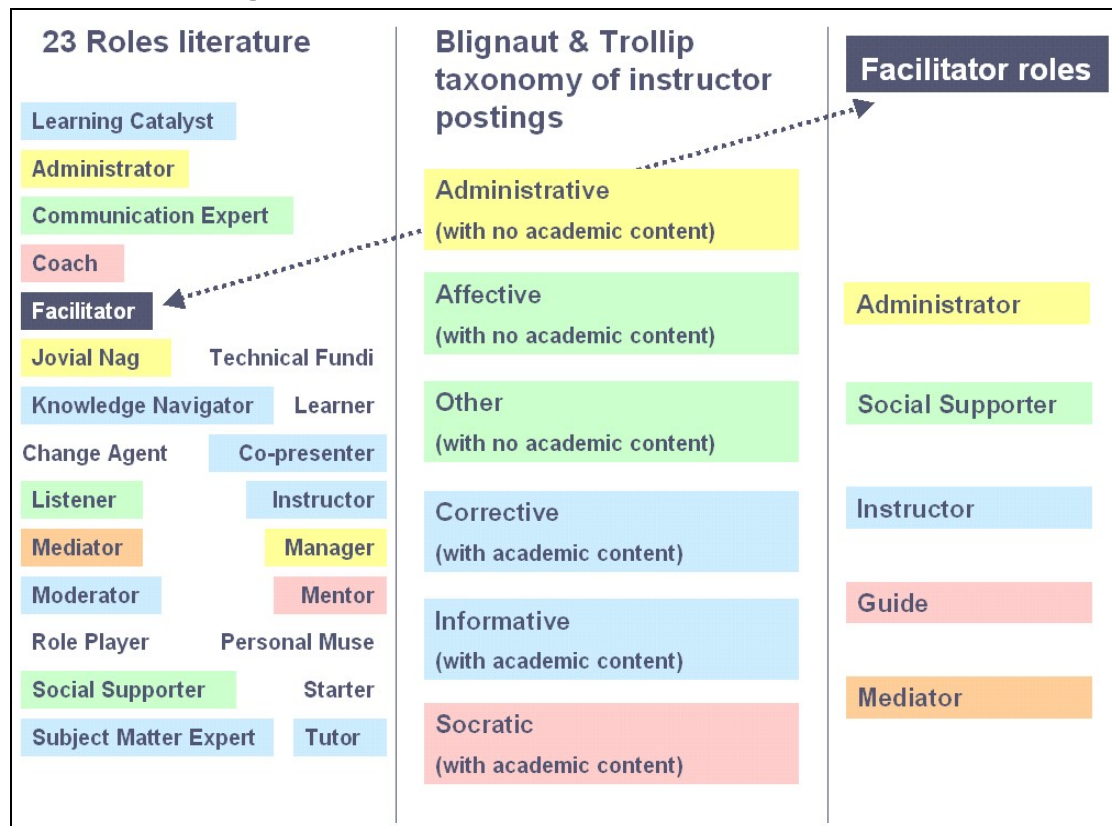
Expertise in these roles would assist newcomers to online facilitation to be less frustrated and worried about what they should be doing when they are facilitating an online course. I designate the main objective of each role as follows:

▪ Role of Administrator: to conduct timeous administration.

▪ Role of Social supporter: to maintain social and emotional rapport.

▪ Role of Instructor: to facilitate the learning process.

▪ Role of Guide: to encourage interactivity so as to foster the acquisition of new knowledge.

▪ Role of Mediator: to ensure fair play.

The identified five roles where then put through *Work Profiling System* Job Analysis Questionnaires (JAQs) to rate high and extreme people competencies, thinking competencies and energy competencies for the role of an online facilitator. The results

generated in the *Work Profiling System* report indicated that the online facilitator needed 13 competencies to be effective in the role of an online facilitator.

The identified 'high' and 'extreme' people competencies were *inter alia*: motivating others; developing others; interpersonal sensitivity; teamwork; building and maintaining relationships. In Table 5.2 each competency is contextualised in the way that the online facilitator displayed it.

Table 5.2:   Interpretation of people competencies

Competencies	Application
Motivating others	Throughout the course the online facilitator motivated the learners on their learning paths. This competency is associated with the role of guide.
Developing others	This succinctly describes the reason why learning occurs and the reason for learner-centred courses. Learners had to acquire new skill sets. Although the learners were working in a constructivist manner, on completion of each assignment, the online facilitator could have provided more tips or easier ways to go about creating certain assignments. At times the learners were struggling with technical issues, and the online facilitator did not provide solutions to their problems. This competency is associated with the role of instructor.
Interpersonal sensitivity	The online facilitator did display a caring persona in the online environment. This means caring about learners and being aware of learners' frustrations, difficulties and fears. This competency is associated with the role of social supporter.
Teamwork	The online facilitator encouraged teamwork so that the learners would not experience the online environment as lonely. On reflection, the initial forming of the teams might have been done differently. Prior to the course, the online facilitator should have issued 'minimum requirements' for the course so that all the learners had a fair change to 'survive' on this course. It seemed that the more computer-literate the learners were, the longer they were able to 'survive' without being evicted to Tribe 5. Learners had to exchange ideas and learn to negotiate with others and to evaluate contributions in a socially acceptable manner. This is also essential to success in the real world. This competency is associated with the role of social supporter.
Building and maintaining relationships	Learning is *per se* a social task (Palloff & Pratt, 1999). The online facilitator promoted social skills and communications skills when learners had to exchange ideas. The online facilitator also placed the learners into various groups and she regularly 'talked' to the learners in a group environment (or individually) to maintain a relationship with the group. This competency is associated with role of social supporter.

The identified 'high' and 'extreme' thinking competencies were *inter alia*: judgment; information gathering; problem analysis; written communication skills; technical skills and competence. In Table 5.3 each competency is contextualised in the way that the online facilitator displayed it.

Table 5.3:   Interpretation of thinking competencies

Competencies	Application
Judgment	In the role of instructor, the online facilitator constantly made judgment calls on the work received in order to be able to provide individual feedback and allocate marks. The online facilitator could have made a better judgment call regarding the workload of the course. The six-week period was not enough time to complete the course.
Information gathering	The online facilitator analysed various issues from different perspectives. She was gathering information to be able to ask questions and to direct the learners. This competency is associated with the role of administrator, social supporter, instructor, guide and mediator.
Problem analysis	The online facilitator remained alert to expressions indicating deep or strong feelings and she also had to solve problems that involved intellectual content. Learners had to solve problems and investigate topics and use a variety of resources to find solutions. As the learners explored, the online facilitator guided them. This competency is associated with the role of instructor, guide, mediator, social supporter and administrator.
Written communication skills	This competency is the only way of communication in the virtual world. The online facilitator acknowledged that she should have written shorter e-mail messages, because the learners did not read long messages. This competency is associated with the role of administrator, social supporter, instructor, guide and mediator.
Technical skills and competence	The online facilitator had to be a subject matter expert. This is associated with the role of instructor. Because the online facilitator had the technical skills and competence, she could provide learners with a rich learning experience. Perhaps, at times, the online facilitator could have suggested more practical tips and warned the learners about traps. As a guide she challenged individual learners to reach bigger heights.

The identified 'high' and 'extreme' energy competencies were *inter alia*: self-confidence; persuasiveness and oral communication skills. In Table 5.4 each competency is contextualised in the way that the online facilitator displayed it.

Table 5.4:   Interpretation of energy competencies

Competencies	Application
Self-confidence	Although the learners indicated that the online facilitator was in control of the course, the online facilitator experienced the first week as chaotic, because the online facilitator did not know how the *Yahoo Groups* platform operated. Perhaps the online facilitator should have tested the *Yahoo Groups* platform before the course started to be able to inform the learners about what they needed to do. This would have made for a much easier start to the course. It was imperative that the online facilitator could substantiate her actions for the course, especially when working with adults. The online facilitator's self-confidence was never in question because she was an expert in the subject matter and so was able to stand her ground in disputes with learners. This competency is associated with the role of administrator, social supporter, instructor, guide and mediator.
Persuasiveness	The online facilitator had to be able to influence attitudes and gain agreement. She used this competency in her role as guide when she encouraged collaboration, and as a social supporter when she thanked learners for what they had done. The online facilitator also used persuasiveness in her role as mediator to reach agreement not to extend the deadline, but rather to extend the time required for the marking of the assignments.
Oral communication skills	Oral communication skills were needed to provide clear guidelines at the face-to-face contact session. At this point in time the online facilitator could have been more explicit about the *Survivor* metaphor, because many of the learners did not know about the television programme. Although this online facilitator only used the pre-selected communication media, White and Weight (2000) indicated that it might be necessary to make the odd telephone call to a learner who was experiencing problems or who was not participating in discussions or who had not submitted assignments. For this, oral communication skills would be necessary.

Exhibit 5.1 reveals the online facilitator's thoughts on self-confidence, extracted from the self-administered questionnaire.

Exhibit 5.1 [Q]:   The online facilitator on self-confidence

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It is essential to belief in yourself, as any hesitance from
a facilitator is immediately spotted by learners.  If they
don't experience you as 'in control' and confident, it is
easy to lose the positive dynamics in the entire group.  I
battled the first week in particular, when nothing happened
as I anticipated it would, and had a hard time masking my
own insecurities as a facilitator.  Afterwards it seemed
that most learners thought the initial chaos was part of my
well-planned introduction to elearning, which of course it
was, however not at all on the scale as it eventually took
place!
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Table 5.5 provides a breakdown of my contribution to the 'body of knowledge'. An online facilitator, to be visible in the online environment, would have to fulfil five roles. To be able to fulfil these five roles, the online facilitator would need 13 competencies for this role because these are the competencies that would be used most often to meet the job objectives.

Table 5.5:   The five roles and 13 competencies for the online facilitator

Online facilitator Competencies	Roles				
	Administrator	Social supporter	Instructor	Guide	Mediator
♥ **People competencies**					
Motivating others				✔	
Developing others			✔		
Interpersonal sensitivity		✔			
Teamwork		✔			
Building/maintaining relationships		✔			
Thinking competencies					
Judgment			✔		
Information gathering	✔	✔	✔	✔	✔
Problem analysis	✔	✔	✔	✔	✔
Written communication skills	✔	✔	✔	✔	✔
Technical skills and competence			✔	✔	
Energy competencies					
Self-confidence	✔	✔	✔	✔	✔
Persuasiveness		✔		✔	✔
Oral communication skills	✔	✔	✔		✔

5.5.   Recommendations

5.5.1. For policy and practice

The following is recommended.

Organisations and institutions considering eLearning, should, at **strategic** level, take cognisance of the importance of online facilitation. Online learners do not want to be left alone in cyberspace. The study reiterates the importance of the role that online facilitators have to play in the success of any eLearning endeavour. Organisations and institutions that have implemented eLearning might want to look more closely at the staff that they have appointed as online facilitators. They might find it necessary to re-train their staff to fulfil visible roles in online facilitation.

At **tactical** level, this study could be used to obtain buy-in from line managers in organisations and institutions to support the development of skills needed for the delivery of online courses.

At **operational** level, the study has provided the framework for the selection of online facilitators. Five roles and 13 competencies have been identified to function in the online environment. Organisations and institutions might want to revisit their policies on ergonomics, flexi-time and teleworking. Individual development plans for online facilitators should include training opportunities to improve competencies that did not rank under 'high' and 'extreme'.

Each online facilitator-to-be needs to be given the opportunity to experience the process first hand – to enrol in an online course and to experience what it is like from a learner's perspective. Conduct 'dress rehearsals' where each facilitator and co-workers participate in a ten-minute online session every day. Such practice may improve skills.

Online facilitators also need to learn everything they need to know about the technology they use. An online facilitator needs to fully understand the capabilities and limitations of the virtual classroom before facilitating an online course. Knowing how the technology works will also increase the online facilitator's comfort level, self-confidence and credibility. Each online facilitator, with his/her manager, should go through a performance management process to discuss development areas and jointly create a development plan to achieve the goals. If this is done, the development of online facilitators will contribute to organisational goals as well as professional growth.

5.5.2. For further research

The following is recommended.

For **fundamental** research purposes, this case study needs to be verified by means of replication. Replication of this study means using the same module on another group of learners with a different online facilitator. Transferability can be obtained by sending questionnaires on the five roles and 13 competencies to practising online facilitators and following the Delphi technique to reach consensus. Focus group interviews could also be conducted to elicit this information.

Applied research could be conducted by investigating a hierarchy of competencies. Which competencies would be considered non-negotiable and which competencies would be considered 'nice-to-have'? Further investigation could consider a team-teach approach towards online facilitation, designing a co-facilitation matrix, identifying essential team competencies and individual competencies.

5.5.3. For further development work

The following is recommended.

- The design of a development plan to achieve the 13 competencies, with listed Service Providers who offer various courses.

- The design and development of a performance management matrix for online facilitators, indicating the key performance areas, weighting, key performance indicators, objectives, measurement and a column for rating purposes.

- The enhancement of the help-desk function to incorporate a support function for online facilitators if no team-teaching is taking place.

- The development of a formalised 'buddy system' or back-up system for online facilitators in the event of the absence of a specific online facilitator who may be ill or on leave.

- The design and development of tools to be used as guidelines for some of the competencies, for example, a job aid that lists appropriate 'Greetings' and a database of Frequently Asked Questions.

- The creation of a 'facilitator learning community' in which facilitators can reflect on tricky situations, share success stories and obtain different viewpoints.

- The compilation of a 'start-up toolkit' for an online learning project. This would include 'to do lists' and checklists for the whole team, including the technical support team, instructional designer, online facilitator etc.

- The design of an online learner dashboard and online facilitator dashboard that provides the online facilitator with training status and activities per online course in terms of synchronous and asynchronous participation. Workflow and process flow will have to be investigated to provide an indication of what the dashboard should consist of.

- The alignment of roles and competencies of the online facilitator with those of the ETD Practitioners for the South African environment.

5.6.   Conclusion

The five roles and 13 competencies of an online facilitator were scrutinised in this instrumental case study. The subsidiary questions (namely adapting to the online environment, 'talking' online, roles, challenges and competencies of an online facilitator) were investigated in a specific order to ensure that a comprehensive and descriptive picture was obtained from this natural setting to arrive at understanding and interpreting how the online facilitator and learners created and maintained their social worlds.

An online facilitator, to be 'visible' in the online environment, would have to play five roles (*administrator, social supporter, instructor, guide and mediator*) and would need a combination of five people competencies (*motivating others, developing others, interpersonal sensitivity, teamwork and building and maintaining relationships*), five thinking competencies (*judgement, information gathering, problem analysis, written communication skills and technical skills and competence*) and three energy competencies (*self-confidence, persuasiveness and oral communication skills*).

ELearning strategists should take serious cognisance of the role of the online facilitator.