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1.1. Prelude

Everyone wants to be a millionaire, but ask a group of trainers whether they want to become distance learning instructors and you'll see them peer around at colleagues, wondering which brave souls will raise their hands (Mantyla, 2000a:1).

1.2. Introduction

Traditional trainers and instructors are frequently cautious and apprehensive when they are faced with the possibility of taking on the role of online facilitators because they do not know what will be expected of them in such a capacity. Research (Dewar & Whittington, 2000; Broadbent & Legassie, 2002:8) indicates that a new skill set is needed to function in the online environment. The paradigm for this study is interpretive (Carr & Kemmis, 1986; Burrell & Morgan, 1979) because it interprets the social behaviour of an online facilitator in natural settings by direct and detailed observation of her interactions. It does this with the purpose of arriving at an understanding and interpretation of how the online facilitator and learners create and maintain their social worlds. This case study focuses on the facilitation of an online course, and pays special attention to how the online facilitator interacts with the learners in a text-based environment. The focus is on the 'visible' roles played by the online facilitator and on identified competencies that the facilitator needs to fulfil in these roles. The researcher used observing, selecting, analysing and synthesising texts, and interviewing as data collection methods. Verification methods for this study were member checking, peer reviews and the crystallization process.

Facilitation is about empowering people to take control and responsibility for their own efforts and achievements. It is the provision of opportunities, resources, encouragement and support for the group to succeed in achieving its objectives, and to do this through enabling the group to take control and responsibility for the way they proceed (Bentley, 1994). Online facilitators are trainers or instructors who teach online, via a computer.

1.3. Background

Traditional methods of facilitating learning require only the instructor, a textbook and whatever additional resource materials the instructor was as able to gather (Taylor, 2002). With the advent of computers and Internet-based education and training, all this has changed. Online learning represents a major paradigm shift and has caused fundamental changes in education. There are at least three factors that are driving this major innovation: the convergence of classroom teaching and open learning; the push for technology-enhanced collaborative learning and the changing relationship between student and teacher (Westera, 1999). Murray (2001) observes that the one common theme that underpins such changes and upon which their success hinges is the development of teachers, instructors and education staff.

According to Broadbent and Legassie (2002) and Zorfass, Remz and Ethier (1998) many eLearning efforts have made the mistake of assuming that teaching online is the same as teaching in the classroom. Online instruction is different from its face-to-face counterpart. A good classroom instructor will not necessarily make a good online instructor – or vice versa. Kling (in Mendels, 1999) supports this argument by saying that if university administrators want to promote distance education, they will need to recognise that teaching online is *not* the same as teaching in the classroom, and that both teachers and students need to understand this and be better prepared to handle the differences. Many researchers have overlooked the difficulties inherent in online pedagogy while praising the educational potential of technology (Mendels, 1999).

The professional literature and even the scholarly literature about activities related to the use of computer networks tend to be upbeat, optimistic and at times even utopian ... to look at the literature on the subject (online teaching), one would not have a clue that issues of the kinds we identified could happen, let alone be thought through and engaged (Kling in Mendels, 1999:5).

Online instructors need new competencies and new sets of skills (Dewar & Whittington, 2000) and they will have to develop appropriate new techniques and sensitivities.

Acquiring these skills takes practice and time. The time to address these issues is *not* when the online course has already been launched. Any online learning project should begin with a consideration of instructor roles and requirements, the identification of potential instructors, and the training of those instructors in the techniques of online instruction until they are competent in what they will be required to do. eLearning can only be successful and effective if time and effort are invested in these preparatory steps (Broadbent & Legassie, 2002:8).

1.4. Problem identification

1.4.1. *Practical problem*

With the emergence of technology, traditional trainers have had to step outside their familiar role of face-to-face teachers into the relatively new territory of online learning (Xebec McGraw-Hill, 2001:13). Because of this, instructors have been required to learn new skills and attitudes (Taylor, 2002). Classroom facilitators, instructors and trainers are generally nervous to learn these new skills because they do not know what is expected of them in this new online environment. Primary factors inhibiting instructors from teaching via distance as identified in the literature are as follows:

- Their age gap. Traditional trainers are from the older generation that did not grow up with technology (Mantyla, 2000a; Murray, 2001).



Refer to Annexure A: Paradigm Quiz.

- Scepticism that training via distance learning is not as good as the tried-and-tested classroom experience (Mantyla, 2000a; Murray, 2001) and reduced course quality (Betts, 1998; Clark, 1993).
- Fear and anxiety caused by using new technology and the possibility of appearing to be less than proficient in doing so (Mantyla, 2000a; Murray, 2001).
- Training where peers can see them (Mantyla, 2000a; Murray, 2001).
- Lack of confidence (Mantyla, 2000a; Murray, 2001) and negative attitudes of colleagues (Moore, 1997).
- Inadequate access to appropriate up-to-date computer technologies (Mantyla, 2000a; Murray, 2001) and lack of technical and administrative support (Betts, 1998; Clark, 1993; Schifter, 2000).

- Inadequate training for the instructors who are expected to write and teach the online courses (Schifter, 2000).
- A perceived lack of control (Mantyla, 2000a; Murray, 2001).
- Insufficient practice on the job (Mantyla, 2000a; Murray, 2001).
- Fear of losing their jobs (Mantyla, 2000a; Murray, 2001).
- Increased workload (Betts, 1998; Dillon & Walsh, 1992; Eisenburg, 1998) and the time it takes to develop and deliver online courses (Clay, 1999; Georges, 2001).
- The altered role of the instructor (Dooley, (n.d.); Kaiser, 1998).

According to Taylor (2002) and Choden (2001), instructors have to face this challenge. For many it is a daunting task. For others it represents a seemingly unnecessary and unwelcome change. Some trainers will successfully make the transition while others may be forced to look for another job.

Learning will always remain as important as ever. Learning and performance improvement is what is important for as far into the future as anyone can see (Rosenberg, 2001:311). Because training, development, education and learning are all important elements for trainers and instructors, they need to be able to use various technologies effectively in the delivery of learning interventions and the optimal performance of their jobs. Qualified teachers thus need to have their skills and knowledge constantly enhanced if they are to keep up with new technologies and trends. Because learning opportunities span a person's lifetime in the information age (Gunasekaran, McNeil & Shaul, 2002) personal role adjustments are a life-long activity. Poole and Axman (2002) are of the opinion that necessary 21st century skills include not only traditional core competencies, but also technology literacy, inventive thinking, communication and collaboration and the ability for self-directed learning.

*Learning is a lifelong process, **especially for instructors**. Keeping up with technology is a must for every teacher and trainer. It can be compared to a "virtual" treadmill – either keep moving or fall off the end. There is no possibility of standing still. Technology is changing the face of education and online learning offers much to learn (Taylor, 2002:34 – my emphasis).*

Suitable people therefore need to be selected as online facilitators.

1.4.2. Research problem

The core problem of this study is that classroom facilitators, instructors and trainers are nervous to take the step toward online facilitation, as they do not know what is expected of them in this new online environment. It implies that traditional trainers need to step outside their comfort zone into a relatively new territory and the trainers need help in this area (Xebec McGraw-Hill, 2001:13). Trainers have always played a vital role in the learning arena and the introduction of Internet-driven learning methods should complement what trainers' offer, not eliminate the need for them.

1.5. Purpose and objectives of the study

The purpose of this research is to identify what different roles the online facilitator plays in the online environment in order to be able to identify which competencies the online facilitator needs to function in the online environment.

Given the purpose, the objectives are *inter alia*:

- To describe what the online facilitator did in the online environment.
- To investigate the various roles that the online facilitator played to be 'visible' in the online environment.
- To scrutinise the challenges that the online facilitator faced.
- To design a *Work Profiling System (WPS)* Person Specific Report for the online facilitator from the most job-relevant competencies, based upon an analysis of the tasks, activities and work context that comprise this job.

1.6. Research question

The research set out to answer the following question:

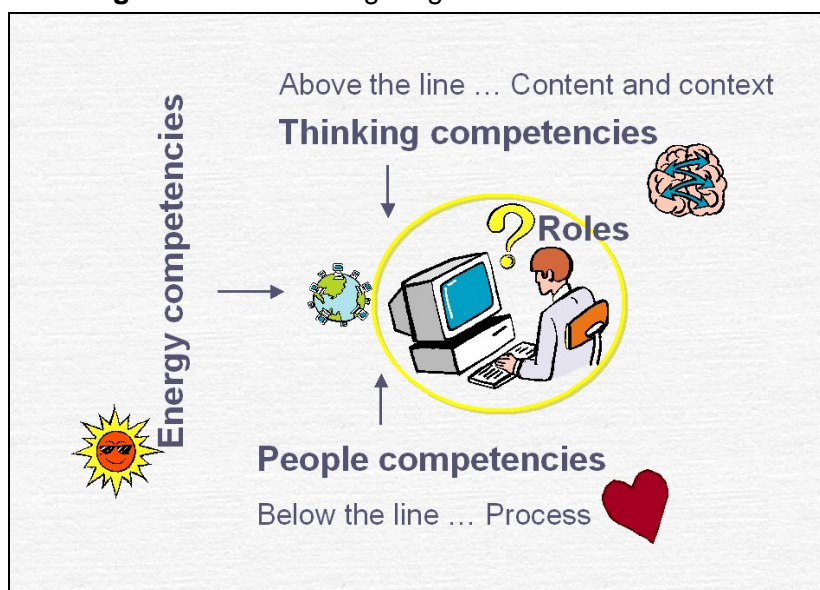
What are the roles and competencies of an online facilitator?

In order to answer the main question, the following subsidiary questions, as indicated in Table 1.1, were also answered as part of the research.

Table 1.1: Research subsidiary questions

Research context	Research subsidiary questions
<p>The context for this instrumental case study was the 2002 ORO 880 online module on eLearning for the Master's degree in Computer Assisted Education of the University of Pretoria, South Africa. The module simulated the popular reality television series, <i>Survivor</i>, implementing the same rules and events that took place in the television series – except that the location had been shifted to cyberspace. The name was adapted to <i>CyberSurviver</i>, emphasising 'surf', to indicate surfing the Internet to get to various locations.</p>	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?

The research is conceptually represented in Figure 1.1. 'Above the line' issues in the conceptual map deal with how the online facilitator structured the course in the virtual environment, the content of the course, the individual and 'tribal' (group) assignments and in-time delivery of assignments. In essence, this represents the intellectual dimension of the course. 'Below the line' issues that were scrutinised were the dynamics of the virtual community, how the online facilitator 'talked' and encouraged the learners, what challenges were faced, how conflict was managed, the dysfunctional tribes, social interaction between the tribes and the online facilitator, and processes put in place to assist the learners *en route* to their learning paths. In essence, this represents the social dimension of the course.

Figure 1.1: Investigating the online facilitator

I formed part of a research team of three partners who all investigated the case study from different angles. The roles, responsibilities and main research question of the three researchers are indicated in Table 1.2. My two fellow researchers acted as external commentators and played an important role in triangulating the investigation.

Table 1.2: The roles of the three researchers and learners

Researcher	Role	Responsibility and main research question
Linda van Ryneveld	Facilitator	Taught the online module from 18 July 2002 to 29 August 2002 and participated in the face-to-face interview.
	Researcher	Study the motivational factors involved in teaching and learning online in a course that is based on a game. <i>What are the operative dynamics in a web-based course that is presented in the form of a game to adult learners? (In progress)</i>
Salomé Meyer	Researcher Observer	Study the affective considerations in the design of online learning for adults. <i>What is the nature of the lived experience (feelings) of students in an online education setting and how did it influence their learning experience? (In progress)</i>
Debbie Adendorff	Researcher Observer	Study the role of the online facilitator. <i>What are the roles and competencies of an online facilitator?</i>

Table 1.2: The roles of the three researchers and learners

Researcher	Role	Responsibility and main research question
Learners	Participants in the 2002 ORO 880 <i>Surviver</i> Module on eLearning	Provided e-mails and other asynchronous messages for data collection purposes. Participated in the focus group interview.

The three of us were affectionately labelled as members of 'The Big Project', as is indicated in Figure 1.2.

Figure 1.2: Overview of 'The Big Project'

1.7. Rationale and background for the study

Although online learning is growing in popularity, it is not a problem-free format for delivering learning interventions. Improving online learning is rather an evolutionary process that must take cognisance of team competencies, capabilities, resource limitations, time constraints and employee receptiveness to the changed way of learning (Mazoué, 1999).

When a learning problem in the online learning format becomes evident, it often becomes a matter for research. After doing a comprehensive literature review, the researcher established that there is a definite role for the **online facilitator**. However, the real problem arises when trying to define the most imperative roles in terms of their visibility because, as can be seen from the synthesis in Table 1.3, literature indicates that there are 23 roles from which to choose. This makes prioritisation a nearly impossible task. This problem will be illustrated in Chapter 2.

1.7.1. Roles for the online facilitator: A review of previous research

Articles and surveys in the literature about the facilitation of online learning indicate how crucial the role of the online facilitator is (Rosenberg, 2001; Duckworth, 2001; Hofmann, 2001a; Harris & Figg, 1994; Nichols, 2002; Rykert, 2002; West & Luetkehans, 1998; Taylor, 2002; Mazoué, 1999). In spite of this, disagreements exist about the roles that the online facilitator needs to fulfil (Choden, 2002; Zorfass *et al.* 1998). What is also clearly evident is that facilitation of online learning in the formal environment has been the subject of more research than the non-formal environment (Clarke & Cronjé, 1998; Collison, Elbaum, Haavind & Tinker, 2000; Coppola, Hiltz & Rotter, 2002; Dutton, Dutton & Perry, 2002; Garrison, Anderson & Archer, 2000; King, 2002; Rovai, 2002; Schrum & Hong, 2002; Selwyn, 2000).

What one finds in the non-formal environment are surveys conducted by commercial training organisations for their customers. Such surveys have been carried out across industry sectors and might contain biases in the reporting of the findings (Vesta, 2002; DigitalThink, 2002). Other reports that are being sold over the Internet at a fee reflect the perceived commercial value of *understanding* what makes online learning implementation and facilitation effective. Online facilitation courses are being offered at exorbitant \$US prices. Also available are general URLs (Uniform Resource Locators – Internet addresses to various sites) for online facilitation and collaboration, learning how to learn, general resources and online instructional strategies (Hall & LeCavalier, 2000).

Twenty-three roles have been identified for the online facilitator. Although the individual authors never list more than seven roles at a time, these roles amount to 23 different roles when they have been analysed and synthesised. Some of these roles overlap and could possibly be integrated into previously mentioned roles.

Table 1.3 provides a summary of the various roles listed, together with the referenced authors, as condensed from the literature.

Table 1.3: Roles for the online facilitator

Roles	Reference
Role of Learner This role would be a pre-requisite for any online facilitator	Choden (2002) Peté, Fregona & Cronjé (2002) Zorfass <i>et al.</i> (1998)
Role of Administrator (my terminology)	Choden (2002)
Role of Change Agent	Choden (2002)
Role of Coach Also referred to as 'Guide on the side', 'Reflective guide', 'Tour guide' and 'Travel guide'	Ambrose (2001) Broadbent & Legassie (2002) Collison <i>et al.</i> (2000) Corley (1998) Harris & Figg (1994) Mazoué (1999) Regents of the University of Minnesota (2002) Rosenberg (2001) Zorfass <i>et al.</i> (1998)
Role of Communication Expert	Harris & Figg (1994)
Role of Co-presenter	Duckworth (2001) Rykert (200)
Role of Facilitator Also referred to as 'Conceptual facilitator'	Ambrose (2001) Broadbent & Legassie (2002) Haynes, Pouraghabagher & Seu (1997) Mazoué (1999) McGee & Boyd (1995) Peté <i>et al.</i> (2002) Zorfass <i>et al.</i> (1998)
Role of Instructor Also referred to as 'Pedagogue'	Berge (1996) Choden (2002) Zorfass <i>et al.</i> (1998)
Role of Jovial Nag	Harris & Figg (1994)
Role of Knowledge Navigator Also referred to as 'Orchestrator of resources'	Choden (2002) Mazoué (1999) Volery & Lord (2000) Zorfass <i>et al.</i> (1998)
Role of Learning Catalyst Also referred to as 'Creator of learning experiences'	Inayatullah (1999) Owston (1997) Volery & Lord (2000)
Role of Listener	Choden (2002) Harris & Figg (1994) Zorfass <i>et al.</i> (1998)
Role of Manager	Berge (1996) Choden (2002) Peté <i>et al.</i> (2002)

Table 1.3: Roles for the online facilitator

Roles	Reference
Role of Mediator Also referred to as 'Referee'	Ambrose (2001) Broadbent & Legassie (2002) Harris & Figg (1994) Mazoué (1999) McGee & Boyd (1995)
Role of Mentor	Mazoué (1999) Nichols (2002)
Role of Moderator Also referred to as 'Evaluator'	Ambrose (2001) Choden (2002) McGee & Boyd (1995) Peté <i>et al.</i> (2002)
Role of Personal Muse	Ambrose (2001) Broadbent & Legassie (2002)
Role of Role Player	Ambrose (2001) Broadbent & Legassie (2002)
Role of Social Supporter	Berge (1996) Choden (2002)
Role of Starter Also referred to as 'Prompter'	Broadbent & Legassie (2002) Harris & Figg (1994) Mazoué (1999)
Role of Subject Matter Expert	Zorfass <i>et al.</i> (1998)
Role of Tutor	Harris & Figg (1994)
Role of Technical Fundi (my terminology) Also referred to as 'Technical assistant' or 'Technician'	Berge (1996) Choden (2002) Duckworth (2001) Harris & Figg (1994)

Online facilitation is a new skill that needs to be learnt, practiced and experienced (Langan, 1997; Choden, 2002; Peté *et al.* 2002; Zorfass *et al.* 1998).



Since a literature study did not pinpoint this new skill set, the researcher felt that it was necessary to conduct a case study to establish what *really* happens during the facilitation of an online course. This will be illustrated in the discussion of the research design for this study.

1.7.2. **Competencies: An explanation**

There are several dimensions against which it is possible to assess the level of fit between an applicant and a job or role (SHL, 1998). These are *inter alia*:

- Interest (very simply, this looks at what you want to do).
- Style (looks at how you like to do it).

- Motivation (looks at why you do it).
- Ability (looks at whether or not you can do it).

In the 'new' economy (Capelli, 2000), employees are key assets because they have a remarkable impact on organisational performance. Competency-based systems have increasingly been recognised as effective tools in the strategic management of human resources. Competency models provide an integrated framework that links people to the business through human resource processes, from selection to succession planning (SHL, 1998) in the following ways:

- In **recruitment**, competencies communicate the corporate or organisational message to the suitable target audience and serve as criteria for screening application forms and CVs.
- In **selection**, competencies integrate psychometric, assessment centre and interview information into a unified framework.
- In **performance management**, competencies describe job behaviours that are evaluated in conjunction with job objectives.
- In **development**, competencies enable comprehensive feedback on individual strengths and development needs as well as effective personal development planning and career pathing.

Competencies enable one to focus on clearly specified behaviour. Managers are aware of what they are looking for when selecting new employees; staff see what is required of them within their role, and training and development may be provided to address clearly defined needs or deficiencies.

'Competencies' (Krüger, 2002) refer to the inherent (or pre-existing) *clusters* of knowledge, interest, attitude, willingness, ability, skills and human attributes that are important for effective functioning in a role. They include the conscious and unconscious dimensions of each person and they focus on work profiling.

Boyatzis (1982) describes a 'job competency' as an underlying characteristic of a person that results in an effective and/or superior performance in a job. It may be a motive, trait, and skill, an aspect of one's self image or social role, or a body of knowledge that a person uses.

1.7.3. *Competencies for the online facilitator*

The literature is limited with regard to competencies that the online facilitator needs. Articles that the researcher found often listed online teaching tips and tasks to be conducted by the facilitator. These included: monitor use of your online material, keep tight deadlines, include downloads of required software (Embleton, 1999); acknowledge questions and respond soon, avoid exotic fonts, chunk text, keep pages to about 35K to 50K in file size (Tang, 2000); allow enough time prior to the start date for development, make course content interesting, determine learning preferences for the current group of learners, carefully select activities (Batovsky, 2002); begin and end on time, ask for support, establish group identity, suspend judgment upon spelling and grammar accuracy (Duckworth, 2001).

Two articles did list facilitator competencies. Schuman (2002) listed facilitator qualities, and Full Circle Associates (2002b) listed skills. However, some of the competencies also fell into task descriptions or only provided lists such as learning styles, teaching/training, feedback skills, e-mail and ftp (Full Circle Associates, 2002b).

Palloff and Pratt (1999) suggest that faculty teaching online must play both intellectual and social roles. It is for this reason that the researcher selected to use the *Work Profiling System (WPS)* tool from Saville and Holdsworth Ltd (SHL). This is reflected in Table 1.4. This tool has a definite 'people component', which is imperative in a virtual environment to establish social interaction (Palloff & Pratt, 1999; Barclay, 2001). People competencies link to the social role, as is indicated by Palloff and Pratt (1999).

There is also the thinking component. This indicates that the online facilitator has to facilitate the learning process and provide intellectual and scholarly leadership whilst sharing his/her subject matter knowledge with students (Anderson, Rourke, Garrison & Archer, 2001). The thinking competencies would link to the intellectual role, as indicated by Palloff and Pratt (1999).

Energy competencies (SHL) are also indicated on the *WPS*. As Wilkinson (2001:1) indicates, top facilitators know that it is important to maintain a high energy level because it engages the group by grabbing their attention, gaining their interest and keeping it fun. The facilitator's energy rejuvenates the topic indirectly and suggests to the participants that the topic must be important because the facilitator seems to be excited about it. Energy also increases the perception of the facilitator's self-confidence.

Table 1.4 provides a list of people competencies, thinking competencies and energy competencies, with indicators of what is expected of a particular person designated for a certain role (SHL, 1998).

Table 1.4: Explanation of competencies

People Competencies	Indicator
Leadership:	<ul style="list-style-type: none"> ▪ Providing direction ▪ Empowering ▪ Motivating others ▪ Developing others ▪ Attracting and developing talent
Interpersonal:	<ul style="list-style-type: none"> ▪ Interpersonal sensitivity ▪ Teamwork ▪ Building and maintaining relationships ▪ Flexibility ▪ Stress tolerance ▪ Tenacity ▪ Cross cultural awareness ▪ Integrity
Thinking Competencies	Description
Analytical:	<ul style="list-style-type: none"> ▪ Judgement ▪ Information gathering ▪ Problem analysis ▪ Objective setting ▪ Management control ▪ Written communication skills ▪ Technical skills and competence
Business awareness:	<ul style="list-style-type: none"> ▪ Organisational awareness ▪ Strategic perspective ▪ Commercial orientation ▪ Cross functional awareness ▪ Innovation ▪ Career and self development
Energy Competencies	Description
Dynamism:	<ul style="list-style-type: none"> ▪ Self confidence ▪ Impact ▪ Decisiveness ▪ Drive ▪ Initiative ▪ Persuasiveness ▪ Oral communication skills
Operational:	<ul style="list-style-type: none"> ▪ Concern for excellence ▪ Customer service orientation ▪ Execution



A literature study did not provide sufficient information about the competencies needed by the online facilitator to operate in the online environment. Observing the online facilitator, selecting and analysing the virtual artefacts and interviewing the online

facilitator should provide better insight into the required competencies for the role of an online facilitator. After conducting the work profiling session, it should be possible to compile a *Work Profiling System* report for the online facilitator, listing the applicable indicators per people competencies, thinking competencies and energy competencies. With such information at hand, potential online facilitators should be able to understand what is expected of them in this role.

1.8. Uniqueness of the study

Since current available knowledge about online facilitation is incomplete, this study will provide the following explicit information:

- Examined roles with related responsibilities that the online facilitator fulfilled to be visible when conducting online learning.
- Documented facilitation techniques and new sensitivities to accommodate challenges and difficult situations.
- Designed *Work Profiling System (WPS)* Person Specific Report for the online facilitator in terms of people competencies, thinking competencies and energy competencies. These competencies are derived from the most job-relevant competencies which have been derived from an analysis of the tasks, activities and work context that comprise this job.
- Evidence of research collaboration. Research collaboration made this study unique. Different researchers used the same data for three different studies. Three researchers had the advantage of receiving constant critiques about their processes from each other.
- This study lends itself to transferability. The purpose of this study is to create context for the reader. The reader can then interpret the situation, and based on the context, s/he can then transfer the knowledge where appropriate. The transfer of knowledge is based on the context of the online facilitator in the virtual environment. Context-based transferability indicates the degree of similarity between the original situation (online facilitator) and the situation to which it is transferred, by providing sufficient information that can be used by the reader to determine whether the findings are applicable to the new situation (specifically with regard to the roles played and how the online facilitator manages tricky situations and interacts with the learners). Although the study was conducted in the formal environment of a university master's programme, the role of

the online facilitator is not confined to the formal environment and the findings gathered could be of value in any online learning environment.

1.9. Purpose statement

The purpose of this study is to identify the roles and competencies of the online facilitator and, in so doing, to contribute to the dialogue of the facilitation process.

1.10. The scope of the study

The research focused on the facilitation of a single online course by paying special attention to the online facilitator *per se* and how this person interacted with the 24 learners in a text-based environment over a period of six weeks by helping them along and making their learning path easier.

1.10.1. What is excluded from the study?

The study did not cater for the following:

- The design and development of course material.
- The role of Instructional Designer or Course Developer.
- The role of Instructional Designer and Facilitator.
- The selection and use of eLearning platforms.
- Computer infrastructure – hardware and software specifications.
- The academic background of the facilitators or the learners.
- South African Qualifications Authority requirements.
- The development of Education, Training and Development (ETD) Practitioners.

1.11. Research approach

A qualitative research approach was followed because the aim of this research was to study events in their natural setting in an attempt to interpret phenomena in terms of the meaning people bring to them (Greenhalgh & Taylor, 1997). This approach is derived from the humanities and emphasises holistic information and interpretive approaches to be able to *Verstehen* (Husén, 1999:32 – my emphasis) i.e. understanding something in

its context. This was applicable to the study as the researcher is investigating the roles and competencies of the online facilitator during an online course.

According to Denzin and Lincoln (1995), all qualitative research is *interpretative*, because it is guided by a set of beliefs about the world and how it should be understood and studied. This study falls within the **interpretive paradigm** because it explores socially meaningful action through direct detailed observation of the online facilitator in a natural setting in order to arrive at understandings and interpretations of how the facilitator and learners create and maintain their social worlds.

1.12. Research design

A research design is a plan or blueprint of the activities planned for the research and it is selected in accordance with the type of research questions asked (Mouton, 2001). It is the logic that links the data to be collected and the conclusions to be drawn to the initial questions of the study (Rowley, 2002).

The selected research method for this study was a **case study** because the goal was to obtain an in-depth understanding of the facilitator in an online situation. A specific online case was explored over a six-week period through detailed, in-depth data collection that included multiple sources of information that were rich in context (Creswell, 1998).

Merriam (1998:27) says of case study research:

... [T]he single most defining characteristic ... lies in delimiting the object of the study, the case. I can "fence in" what I am going to study.

1.12.1. The subject of the study

The study focused on a single case study where an online facilitator facilitated 24 master's degree students of the University of Pretoria on the eLearn ORO 880 Module 'Educational Strengths and Weaknesses of the Internet' for a six week period, from 18 July 2002 to 29 August 2002. The single case was Linda van Ryneveld, a female white South African with a MEd CBT *Cum Laude* degree, who works in the field of telematic education at the Tshwane University of Technology.

Linda van Ryneveld was selected because she is experienced 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. Linda was the creator of *CyberSurviver* and she was one of the members of the 'Big Project' research

team. She was also particularly interested in facilitating this module for personal development reasons.

In terms of the constructivist paradigm, which informs the view of knowledge subscribed to in this study, learners help each other to construct knowledge, and this has implications for the role of the teacher/instructor because the line between teacher/instructor and learner becomes blurred. There is a distinct change in the role that the teacher/instructor plays. According to Doolittle and William (1999:70), the teacher's job is to motivate, provide examples, discuss, facilitate, support and challenge, but not to attempt to act as a knowledge conduit. Linda van Ryneveld wanted to establish what roles she had indeed played in the online environment. Linda van Ryneveld was open to any suggestions to improve her techniques and competencies because these are important components of any eLearning intervention.

The researcher selected the eLearn ORO 880 Module for the following reasons:

This module is based on constructivist learning (Dick, 1991). In it learners actively participate in problem solving and critical thinking in a learning activity. The learners construct their own knowledge by testing ideas and approaches on the basis of their prior knowledge and experience. They apply these to a new situation and integrate the new knowledge gained with pre-existing intellectual constructs. Wilson (1996:5) defines a constructivist-learning environment as 'a place where learners may work together and support each other as they use a variety of tools and information resources in their guided pursuit of learning goals and problem-solving activities'. The learning is controlled by the learner, and is (at the most) only guided or influenced by the facilitator.

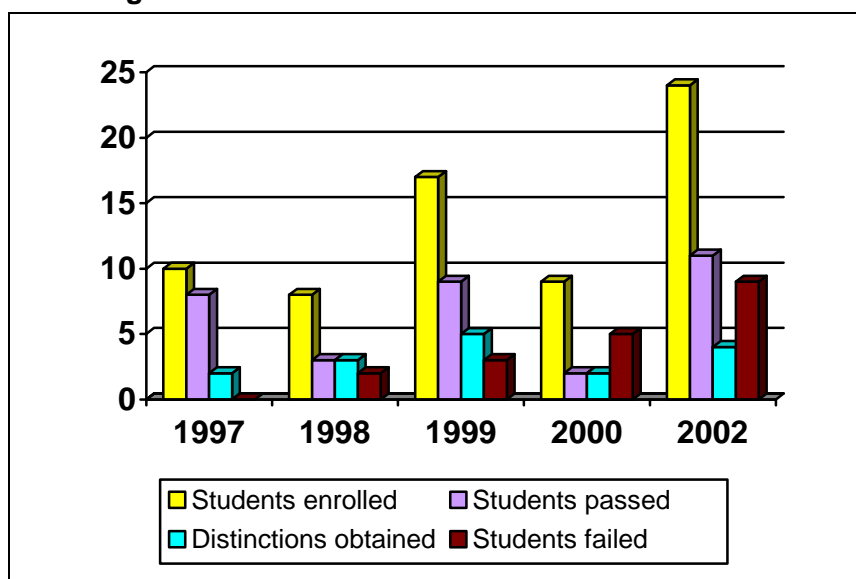
This module forms part of the MEd curriculum that was taught in 1997, 1998, 1999 and 2000. This particular module has a long track record of presentation and it is seen as a successful module because learners acquire various skills as part of their lifelong learning experience that can be utilised 'back-on-the-job'. It is a practical module in which learners are provided with a variety of tools to build their own websites. This complies with one of the key elements of constructivism since they construct multiple representations of data (Maur, 1999). In this module learners demonstrate a high level of creativity when they produce assignments. Figure 1.3 provides statistics on the success rate of this particular module. By constructing their own learning, the learners learn about the strengths and weaknesses of the Internet in a learning environment.

By the time that the learners get to do this module, they have already completed four modules and they have acquired the skill to participate in co-operative work. The eLearn

module is structured around individual assignments and group assignments.

Collaboration is seen as another key element in constructivist learning (Maur, 1999) in which a community works towards shared goals.

Two modifications were made to the 2002 ORO 880 Module. The module simulated the popular reality television series, *Survivor*. Apart from the location, which in the television series is usually some deserted spot, the location was cyberspace. The name was also adapted to *CyberSurviver*, emphasising ‘surf’, as in surfing the Internet to get to various locations. The same rules and events that are found in the television series took place. The *Survivor* television series is known for various activities that the tribal members have to fulfil – and the frustration, tension and volatile emotions that characterise the game. It was hoped that similar reactions would be evoked in the online module. This particular feature of the game made it unique for use as a case study. The more frustration, drama, trauma and problems evoked in the game, the more meaningful it would be to study the online facilitator and how she dealt with all the challenges. The results for the 2002 course are also incorporated in Figure 1.3. (This module was not taught in 2001 because there was a change in course scheduling. Table 1.5 provides a breakdown of the statistics for the ORO 880 Module, used in Figure 1.3.

Figure 1.3: Statistics for ORO 880 Module**Table 1.5:** Breakdown of the statistics for ORO 880 Module

Statistics	1997	1998	1999	2000	2002
Students enrolled	10	8	17	9	24
Students passed	8	3	9	2	11
Distinctions obtained	2	3	5	2	4
Students failed	0	2	3	5	9

The sample selection is a typical sample as it reflected the average person and situation of the phenomenon of interest. This sample selection is in no way atypical, extreme, deviant or intensely unusual (Merriam, 1998:62).

1.12.2. *Research methodology*

Research methodology pinpoints the research process and the kind of tools and procedures to be used. Observing, selecting, analysing and synthesising texts and interviewing were used as data collection methods. Member checking, peer reviews and the crystallization process were used as verification methods for this study. The design classification is hybrid data that is a combination of textual and numeric data and it has a low degree of control.



The researcher gathered **primary data** by means of researcher field notes, by being an observer participant, and by observing the online facilitator at work in the online environment. The researcher observed the online facilitator's actions, responses, non-verbal communications and visibility. The researcher did not participate in any online

activities, but was logged onto the system most of the time and received the messages and assignments as the participants received their information.

Another set of **primary data** was obtained from the various sets of online information that the online facilitator sent to the group and received from the group during the six-week period, which were produced independently of the research study.



Text messages consisted of *inter alia*:

- Asynchronous *Yahoo Groups* electronic group messages and *WebCT* messages.
- Synchronous *Yahoo Messenger* messages.
- Sound files.
- Formal test responses.
- Self-administered questionnaire.

A content analysis of the asynchronous *Yahoo Groups* electronic group messages and *WebCT* messages and synchronous *Yahoo Messenger* messages was done in terms of the Blignaut and Trollip (2003) taxonomy of faculty participation in asynchronous learning environments.



Interviews:

An interview protocol was designed. The questions were open-ended and loosely structured. They combined ideal position questions (to elicit information and opinion) and interpretive questions (Merriam, 1998). The interviews were recorded on a dictaphone and then transcribed. The following interviews were conducted:

- Focus group interview with learners.
- Personal semi structured face-to-face interview with the online facilitator as a reflective session.

**Work Profiling System (WPS) Session:**

Synthesised information gathered from the field notes, content analysis, formal test responses and interviews was used as input data for the development of the *WPS* report. This information was also distributed to the participants who were included in the work profiling session. The *WPS* is a computerised job analysis system developed by Saville and Holdsworth Ltd (SHL). The *Work Profiling System* session consisted of one accomplished performer in online facilitation, the researcher and two independent verifiers/observers, facilitated by a trained *WPS* consultant. This session lasted for approximately four hours. The responses were then entered into the *WPS* database and reports were generated.

Secondary data was gathered from analysing the roles of the online facilitation from the literature. Online facilitator roles, featured in the literature, were compared to the actual online facilitator roles in the case study.

The research design and data collection methods are graphically presented and summarised in Table 1.6. Each research subsidiary question is matched to a data collection method, which, in turn, is linked to a numbered data collection instrument.

Table 1.6: Research design and data collection methods




Research Design: Case study		What are the roles and competencies of an online facilitator?				
		Subsidiary questions		Data collection method		
				Observe	Texts	Interview
		How did the facilitator adjust to the online environment?		1	2, 3, 4, 6	9
		How did the online facilitator 'talk' to the learners and encourage dialogue with the learners?		1	2, 3, 4, 6	8, 9
		What roles did the online facilitator play to be 'visible' in the online environment?		1	2, 3, 4, 5, 6	8, 9
		What challenges did the online facilitator face?		1	2, 3, 4, 5, 6	8, 9
		What people competencies were identified for the online environment?		1	2, 3, 4, 5, 6, 7	8, 9
		What thinking competencies were identified for the online environment?		1	2, 3, 4, 5, 6, 7	8, 9
What energy competencies were identified for the online environment?		1	2, 3, 4, 5, 6, 7	8, 9		
Data collection instruments			Authenticity and trustworthiness			
<p>Observe</p>	<p>Select/analyse data texts</p>	<p>Interview</p>	<p>Member checks and peer reviews</p>	<p>Crystallization</p>	<p>Triangulation</p>	
1. Researcher field notes, being an observer participant, observing the online facilitator at work	2. Literature study 3. Asynchronous <i>Yahoo Groups</i> electronic group messages and <i>WebCT</i> messages against Blignaut and Trollip taxonomy 4. Synchronous <i>Yahoo Messenger</i> messages against Blignaut and Trollip taxonomy 5. Sound files 6. Formal test responses 7. Self-administered questionnaire	8. Focus group interview with learners 9. Personal semi structured face-to-face interview with online facilitator as a reflective session	Verify with online facilitator and learners that roles, responsibilities, activities and competencies documented by researcher was interpreted correctly	Tell the same story through data gathered from different data collection instruments <p>Design WPS for online facilitator</p>	Triangulate with research partners	

1.12.3. Procedures of authenticity and trustworthiness

Qualitative researchers strive for 'understanding'. There are various opinions about the importance of verification in qualitative research. Alternative terms have been suggested by a variety of authors for 'internal validity', 'external validity', 'reliability' and 'objectivity'. The suggested alternatives were 'credibility', 'transferability', 'dependability' and 'confirmability' (Creswell, 1998:197). This study focussed on authenticity and trustworthiness (Creswell, 1998).

Because I am both a researcher and observer in this study, I have a bias. Because I have a receptive audience that is awaiting research results, I have a bias. As part of my job, I am responsible for coaching future online facilitators. I have a personal interest in this research because I need to understand what competencies an online facilitator needs to fulfil various roles with effectiveness in the online environment. I also need to take cognisance of the dynamics and dilemmas that online facilitators could face. My involvement will prepare me to be able to select an appropriate person for the role of an online facilitator and to be able to brief online facilitators comprehensively on the various roles that they will need to fulfil. Figure 1.4 provides a snapshot of the researcher's position in the study.

Figure 1.4: The researcher's position in the study

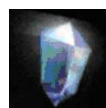
	Head Instructional Designer for a financial institution – my job
	Instructional Designer responsible for online facilitators – my job
	Researcher at the University of Pretoria – my research

I will provide a richly textured description of the study that will allow readers to make their own decisions about context-based transferability (Creswell, 1998; Merriam, 1998). I will describe in detail the online facilitator, the participants and the setting under study. With this detailed description, it is up to the reader to transfer the information to another setting.

To ensure trustworthiness and authenticity in the study, the following measures were put in place:



Member checking and **peer reviews** or debriefing sessions were conducted. The online facilitator and learners verified and judged the accuracy and credibility of the findings and interpretations of the researcher with regards to the roles, responsibilities, activities and competencies of the online facilitator.



Richardson (1995:5) disagrees with the concept of triangulation, and emphasises that the central image for qualitative inquiry is a *crystal* – and not a triangle. Mixed-genre texts in the post-experimental moments have more than three sides. Crystals grow, modify and change. In the **crystallization** process (Richardson, 1995) the researcher told the same story through data gathered from different data sources. This was also followed by a process that considers the data from various angles – by highlighting different aspects, depending on different phases of the analysis.



Investigator triangulation

I form part of a research team of three partners who are all investigating the case study from different angles. The two partners acted as external commentators and played an important role regarding the triangulation/crystallization of the data from the case study.



The data gathered from the taxonomic content analysis, the self-administered questionnaire, field notes, formal test responses and interviews were used as input data for the design a **Work Profiling System (WPS) Person Specific Report** for the future online facilitators from the most job relevant competencies based upon an analysis of the tasks, activities and work context that comprise this job.


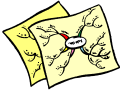


1.13. Delimiters of the study

- The study only focussed on a single case study. Convenience sampling was used as the participants and online facilitator were selected partly because they happened to be available.
- The study focussed on an academic eLearning online module and not an organisational or in-service eLearning module.
- The format of the online course was enriched and restricted by using the game metaphor. Using another didactical approach might have changed the research results.

1.14. Outline of chapters

The outline of the rest of the chapters in the research report is indicated in Table 1.7.

Table 1.7: Overview of the remainder of the research report

Chapter	Description
<p>2</p> 	<p>Literature review: This chapter provides a literature review and a conceptual framework for each subsidiary question.</p>
<p>3</p> 	<p>Research design and methodology: This chapter provides an in-depth description of <i>inter alia</i>:</p> <ul style="list-style-type: none"> ▪ Research approach. ▪ Research design. ▪ Research methodology. ▪ Data collection methods. ▪ Data collection instruments. ▪ Data analysis. ▪ Verification of information.
<p>4</p> 	<p>Analysing the case study – Evidence and discussion: This chapter provides evidence of the various data collection instruments in terms of:</p> <ul style="list-style-type: none"> ▪ Introduction. ▪ Results of being an observer participant, observing the online facilitator at work. ▪ Results of taxonomic content analysis of the asynchronous <i>Yahoo Groups</i> electronic group messages and <i>WebCT</i> messages. ▪ Results of taxonomic content analysis of the synchronous <i>Yahoo Messenger</i> messages. ▪ Results of sound files. ▪ Results of formal test responses. ▪ Results from self-administered questionnaire. ▪ Results of focus group interview with learners. ▪ Results of personal semi structured face-to-face interview with online facilitator as a reflective session. ▪ Results of the design of the <i>WPS</i> for the future online facilitator. ▪ Comprehensive overall results.
<p>5</p> 	<p>Conclusions and recommendations: This chapter concludes the research and provides the following information:</p> <ul style="list-style-type: none"> ▪ Summary This section summarises the research in terms of the research question and the results. ▪ Discussion This is a reflective section and discusses what lessons can be learnt from this research. Information will be provided in terms of methodological reflection, substantive reflection and scientific reflection. ▪ Recommendations for policy and practice, for further research and for further development work.