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**2.1. Prelude**

Plato made the following statement:

*Our true lover of knowledge naturally strives for reality, and will not rest content with each set of particulars which opinion takes from reality, but soars with undimmed and unwearied passion till he grasps the nature of each thing as it is ... (Mouton & Marais, 1990:3).*

**2.2. Introduction**

The process of reviewing literature and the conceptual framework for the study involves extensive reading about what other researchers say about certain topics, gathering information to support or refute arguments and writing about the findings (Bell, 1989). In this chapter five themes are addressed. I will first present aspects of the literature review on each of the themes explicated in the Table of contents (Adjusting to the online environment, 'Talking' online, Facilitator roles, Challenges and demands and Competencies). On each thematic review follows a conceptual framework within which the research question may be answered. Adjusting to the online environment is plotted on the Paprock and Williams (1993) 2 x 2 matrix against learner-centeredness. The facilitator guides and supports the learners *en route* to take control of their own efforts. 'Talking' and encouraging dialogue online can only happen if the online facilitator makes a deliberate attempt to be more interpersonal on the Interpersonal-Impersonal Continuum (White & Weight, 2000). Facilitator roles were examined against the Blignaut and Trollip (2003) taxonomy of faculty participation in asynchronous learning environments. Challenges that the online facilitator had to deal with were examined against the 'Four elements of online conflict' model (White & Weight, 2000). Applicable competencies for the online facilitator were determined against the *Work Profiling System* competencies (SHL, 1998) in terms of people competencies, thinking competencies and energy competencies.

### **2.3. Theme 1: Adjusting to the online environment**

#### **2.3.1. Literature review**

Learning and teaching happen within a community of learners, whether it is in a traditional classroom on the ground, surrounded by physical walls or in an online 'virtual' environment in cyberspace, depicted by connectivity (Makin, 2002) and accessibility. 'Online' refers to any form of learning and teaching that happens via a computer network, and takes place in the context of distance education (Kearsley, 1998). The learners and teachers/instructors are located in different places and most of the interaction takes place via the network.

The development of distance education technologies has created conditions that require faculty to adapt to new ways of teaching and communicating with students (O'Quinn & Corry, 2002). Special ways have to be designed to assign, guide and evaluate students' work. Not only must faculty learn how to use the new technology, but it also requires a paradigm shift in how educators 'orchestrate' the act of learning (Dillon & Walsh, 1992; Hassenplug & Harnish, 1998).

Online learning can be just as effective as traditional classroom learning. A meta-analysis of 19 empirical studies compared online courses with face-to-face courses using measures such as course grades, examination grades and participation. The review found that online learning was always as good as or even better than face-to-face classes (Hiltz *et al.* 2002). Benefits of online learning are the direct result of the differences between online environments and classroom environments. Hiltz and Turoff (1993) discovered that the anonymity of online courses leads to increased student participation, especially among women and minority groups. Students not only participate more often, but they also tend to make longer and more thought-provoking contributions.

This study focuses on the online environment, and it is apparent from the literature that certain adjustments need to be made in order to function in the online environment. Comments on adjusting in the online environment vary from minimal to severe as in indicated by the following quotes. There are 'obvious differences, but some changes may surprise you' (Don'tTeachOnline, 2002). The environment is 'different, yet alike' (White, 2000). The 'whole environment' is different (Palloff & Pratt, 1999). There are 'subtle differences' (Tobin, 2001). It is a 'transition process' (Moreira, 2002). The 'dynamics' of teaching and learning are changing (Kearsley, 1998). Online learning represents the 'biggest potential change in teaching methods since the inception of

formal college education – it is changing higher education for ever’ (Aase, 2000). It ‘doesn’t require anything fancy, but isn’t necessarily easy, either’ (Carnevale, 2000).

Parkin (2001) believes that there is no difference between the classroom environment and the online environment in terms of success measures and the core critical success factors, being appropriate content and learning design. The purpose of any learning intervention is to achieve the learning objectives, and success is measured against those learning objectives. However, environmental and process factors also come into play in the achievement of the learning objectives.

In the classroom environment controllable physical factors can influence the success of the learning intervention. These factors are *inter alia* trainer competence, learner preparedness, group size, comfort, lighting, acoustics, availability of water and the speed of serving the food during breaks. These controllable physical factors do not exist in the online environment; but other unique factors do (Parkin, 2001).

Kleiman (Tobin, 2001) clearly states that online facilitation is very different from classroom teaching because the facilitator does not have as many control points. When participants go off-topic online, the facilitator may not even notice this for a day or two. The facilitator does not have the equivalent of giving the class a ‘look’ or using humour to get the discussion back on track. In the online environment these casual tools do not exist that are so effective in a classroom setting.

The online environment lacks the physical communication cues that teachers/instructors and learners depend on heavily in the classroom environment – for both conscious and unconscious responses (White, 2000; Aase, 2000). This includes nodding, seeing a learner’s facial and body language, smiles, gesturing, eye contact, head bob, a surprised look or a voice tone! (Cyrs & Smith, 1990). This limitation requires unambiguous writing and thorough reading to ensure communication is clearly understood.

Social interaction and learning in the online environment challenge many of the old assumptions about education. The old thinking paradigm’s picture is that the online learning environments should mirror the image of classroom environments, with quiet students who are not engaged and the teacher is the central figure (Aase, 2000; White, 2000). The new thinking paradigm emphasises that online learning has made schooling obsolete, expertise and learning are immediately available ‘on demand’ and ‘just in time’, lurking is participation and teachers are peripheral (Aase, 2000; Kearsley, 1998; Makin, 2002).

Online learning is becoming a learner-centred event while faculty still play a key role in creating and organising class activities (Kearsley, 1998). In the online environment learners are now the active performers of tasks (Makin, 2002) and the importance of widespread participation of learners in the design of their own learning is emerging (Kimball, 1995). In a digital world learning has moved from a domain of reading, writing and arithmetic to one of sight, sound and dimension (Brown, 2000). The online environment is characterised as much by its visual and performance appeal as by its narratives and numbers (Brown, 2000). The best online experiences involve discovery on the part of the learners and in the online environment, this takes more time than in the classroom. Facilitators should allow time for discussions, learner presentations and lively debates (Don'tTeachOnline, 2002). There is a misconception that online classes will be easier than classroom classes. On the contrary, online classes require much more self-discipline and more hard work than traditional classes (Kearsley, 1998).

The total service context in which learning is delivered is changing. Getting the registration, payment, management, technical support and customer services environment running smoothly in real-time is essential for the online environment. These factors in a classroom environment are typically handled in a slow-response offline environment, or do not exist at all (Parkin, 2001).

Technology is a crucial success factor in the online environment (Parkin, 2001; Aase, 2000). No matter how good the course, if the learner cannot access the course, it is a catastrophe. Many designers build high-tech courses and try to dictate that learners upgrade to the required technology specifications. Rather know your target-learning environment and then build courses that will run on it.

Information technology can be integrated into both the classroom environment and the online environment. The interaction between these technologies and new approaches to learning and instruction may differ (Spector & Anderson, 2000). Online learners should demonstrate learning in different ways than they might in the classroom environment, because they have the tools to do so. This means that instead of writing a paper, the online learner could construct a web page presentation. Instead of taking a test and waiting weeks for the results, the learner can obtain immediate feedback from a digital quiz (Aase, 2000).

The various activities related to online settings and the multiple conditions of time in which these activities take place, put more demands on online teachers/instructors than classroom teachers. The workload increases due to the development, production and

facilitation that needs to take place. Moreira (2002) found that there is a 2-to-1 ratio between preparation time and delivery time. Online courses that include audio, video and interactivity also cost more to produce (Aase, 2000). The online activities are the equivalent of structuring a classroom course around learning modes that mix lectures, exercises, discussions, role-plays, group sessions and tests (Parkin, 2001).

Learners participate differently in the online environment. Some learners feel comfortable initiating e-mail discussions while others prefer to just read e-mail messages and not participate actively themselves, the so-called 'lurkers' (Kearsley, 1998). Instructors and learners in the online environment need to be tolerant of different styles of participation.

Unlike the classroom experience, most online learning solutions are a blend of strategies, using synchronous and asynchronous form of communication. This implies that not every learner will be learning at the same speed, or in the same time frame. Some learners may use discussion tools, while others depend on the weekly class meeting online for their learning (Don'tTeachOnline, 2002). Many of the online interactions are asynchronous. The delay between interactions can create differences in responses. This can be positive (people think before they respond) or let emotions build up (why *didn't* they respond?) Those learners that go online more frequently may appear to 'hog' the space than those who log-on less frequently (White, 2000).

Table 2.1 provides a comparison of classroom and online teaching activities (Spector & Anderson, 2000).

**Table 2.1:** Comparison of classroom and online teaching activities

Setting	Location of learners	Use of IT	Temporality of activities	Type of activity
Classroom:	At the same location.	<ul style="list-style-type: none"> <li>▪ Presentation of topics.</li> <li>▪ Consultation.</li> </ul>	*Synchronous.	<ul style="list-style-type: none"> <li>▪ Similar for all learners.</li> <li>▪ Mostly instructor-led.</li> <li>▪ Discussions and small group work.</li> </ul>
Online:	Distributed / scattered at various locations.	<ul style="list-style-type: none"> <li>▪ Presentation of topics.</li> <li>▪ Consultation.</li> <li>▪ Management</li> <li>▪ Production, distribution, collaboration and editing of text.</li> <li>▪ Wide range of interactions (one-to-one, one-to-many, many-to-one and many-to-many).</li> </ul>	<ul style="list-style-type: none"> <li>▪ Synchronous (tele/video conferencing).</li> <li>▪ **Asynchronous (threaded discussion).</li> <li>▪ Synchronous and asynchronous (live broadcast of a remote speaker and archiving for re-use).</li> </ul>	<ul style="list-style-type: none"> <li>▪ According to individuals.</li> <li>▪ Mainly learner-centred.</li> <li>▪ Individual and/or collaborative work (small, medium or large groups).</li> </ul>
<p>* <b>Synchronous</b> transmission refers to the fixed transmission of data between sender and receiver. In distance education, the term 'synchronous' is used to refer to interactions that are 'clocked' – interactions must be sent and received at the same time. An example of a synchronous distance education application is computer-mediated conferencing. The person initiating the conference expects to interact electronically in real time with a person or persons at various sites (Williams, Paprock &amp; Covington, 1999:154).</p>				
<p>** <b>Asynchronous</b> literally means 'not synchronous'. In telecommunications, asynchronous transmission refers to data transmission where there is no clocking signal. Data are sent at irregular intervals. In distance education applications, asynchronous is used to refer to interactions that are not 'clocked' – not sent and received at the same time. An example of asynchronous transmission is sending electronic mail. The party receiving the e-mail message does not have to be present at the time the message is sent. The message is 'posted' for later retrieval (Williams <i>et al.</i> 1999:146).</p>				

The instructor, who imposes a schedule and calls for quiet, controls a physical classroom. However, the online environment changes the social dynamics of learning and teaching by putting everyone (the learners and the instructor) on equal footing (Kearsley, 1998). Under normal circumstances, everyone can post messages and everyone has the same opportunity to contribute ideas and make comments. This change in the *status quo* implies that the teacher/instructor does not automatically command a presence in an online environment (Taparia, 2001). There is no counterpart

to standing at the front of the classroom, speaking to an audience until the bell rings (Kearsley, 1998). In the online environment, the instructor must adopt a role of a facilitator – someone who encourages participation and keeps discussions focused on certain topics (Ambrose, 2001; Broadbent & Legassie, 2002). This is much more difficult than classroom teaching which basically involves the presentation of material (Kearsley, 1998). Unless online learners participate in live video conferencing only, they manage their own environment and find their own time, place and pace to learn.

Online learners have more flexibility because they learn from home and from the office, a hotel room or even a seat in an aeroplane, 24 hours a day, 7 days a week (Parkin, 2001) and are not restricted to contact periods ruled by a timetable. Typical classroom learning has a clearly defined start and end – with a clearly defined cycle (daily or weekly) for learners to depend on. In the online environment, classes are self-paced and flexible in terms of how learners attend these classes. It is not uncommon for a learner to participate just long enough to get the ‘nuggets’ (Don’tTeachOnline, 2002) they were looking for and then leave the class without ‘completing’ it in the traditional sense.

Due to the fact that there are no physical cues in the online environment, it is much more difficult for the facilitator to keep track of exactly what the learners are up to. The learners may be reading their e-mails, talking on the telephone; eating or even writing letters while the facilitator is competing for their attention (Don’tTeachOnline, 2002).

The online environment cannot replicate the rapport that a teacher and learner can share in person. However, the inability of not knowing the learners in person is compensated by knowing the learners by the words and ideas they express. The learners communicate via words and the learners cannot sit passively in the back row twiddling their thumbs – they must interact (Taparia, 2001). Kearsley (1998) concurs that writing skills and the ability to put thoughts into words are vital in the online environment. At this point in time, because most of the online interactions are ‘text-based’, it puts less agile writers and those with a strong visual thinking tendency at a disadvantage. Putting participants at ease with their writing is a key facilitation skill (White, 2000). ‘Text-based’ means that there is a permanent record of each interaction. It is easy to reread the information to gain understanding, but individuals can also rake up old grudges going word for word with ancient posts (White, 2000). It is for this reason that it is imperative to introduce ground rules and rules of netiquette to use in the online environment. Participants need to be considerate of others and think carefully about what they write and be sensitive to any form of cultural bias. The online environment is



a splendid place for debate and discussion, but participants need to be civil and considerate (Shea, 1994; Angell & Heslop, 1994).

An interesting aspect of the egalitarian nature (Kearsley, 1998:2) of the online environment is that it minimises discrimination and prejudice that arises in the classroom environment. Unless someone deliberately reveals it, the instructor has no idea about the age, gender, ethnic background, physical characteristics or disabilities of the learners in an online class.

Although online learning provides an information rich environment, it is socially impoverished and a very lonely and remote learning environment (Palloff & Pratt, 1999; Vault.com, 2000; Makin, 2002). Learning *per se* remains a social task that is built upon social interaction and the success or failure of any learning activity is usually a measure of its success or failure to create effective social interaction, to create a sense of community between the learner and the material, the learner and the teacher and the learners with each other (Dillenberg & Schneider, 1995; Palloff & Pratt, 1999; Barclay, 2001; Moore, 1989). Interaction among learners is crucial in the online environment (Kearsley, 1998). It is the facilitator's role to ensure that a high level of interaction occurs in an online course (Broadbent & Legassie, 2002). A powerful form of interaction is group activity (Kaplan, 2002). Learners can be divided into small groups based upon common interests and skills. These groups can be formed for the full duration of the course or for a short-term period to complete a particular assignment (Palloff & Pratt, 1999; Kearsley, 1998).

In the online environment the instructor/teacher needs to provide feedback to the learners for all assignments completed and postings made. This forms part of the interaction between learner and instructor (Moore, 1989). Learners in the online environment look for some of the same things found in traditional classroom courses – a knowledgeable instructor who interacts with the students (Carnevale, 2000) and instructors who are willing to field questions and engage the learners in group discussions. Although interaction is important, instructors do not have to stay up until all hours answering e-mails to achieve this. The instructor's workload can be limited by having learners moderate their own chats, while the instructor responds to only one out of 10 messages – enough to let the learners know the instructor is paying attention, but without creating an impossible workload for the instructor (Carnevale, 2000; Palloff & Pratt, 1999; Kearsley, 1998). In the traditional classroom, it is unusual for more than a handful of learners to want to talk with the teacher after class. However, in the online environment, nearly all the learners send e-mails to the instructor. The separateness of the online experience encourages learners to try to connect in other ways (Don'tTeachOnline, 2002).

All forms of assessment and evaluation done in the classroom environment can be done in the online environment for example: traditional quizzes, tests with multiple choice answers, problem solving exercises within time limits. Portfolios and work samples are ideal for the online environment. The question of cheating is always raised in online assessment, because online activities are usually done in an unsupervised setting. If assessment involves assignments or projects unique to a particular learner/group, there should be less of a problem. Tests can also be made unique for each learner. In essence, if learners are going to cheat, they will find a way, online or not! Assessing group performance might be more difficult. This burden can also be overcome by having the contribution of each team member identified (Kearsley, 1998).

According to Shepherd (2002) one type of trainer/instructor who is good in the classroom and hopeless online is the 'classroom charismatic'. This person has the force of personality to succeed face-to-face, 'but much of the time is just winging it' (Shepherd, 2002). Online, when neither party has the visual clues, it all breaks down. Competent facilitators do not need to be charismatic, but they need structure and the ability to get learners involved in various activities.

It is actually more demanding to teach online than in a face-to-face situation (Harasim, 1993; Berge, 1995, LaVoie, 2003). It is demanding not only in terms of cognitive load, but also in time required online. Faculty report that they are spending more time preparing and delivering online courses than equivalent face-to-face courses (Pachnowski & Jurczyk, 2003; Care & Scanlan, 2001). Even after teaching an online course eight times, faculty still report that online courses take more of their time to teach (LaVoie, 2003). Faculty do not receive reduced course loads or additional compensation for the extra time that online courses require (LaVoie, 2003). Instructors need a lighter teaching load to provide them with the time both for training involved and to provide time for access to the discussion forums. Using the technology must become seamless for the instructor. For this reason a support team is required in the early implementation stages to ensure that the instructor can focus on teaching and learning instead of the technology (Harasim, 1993; Berge, 1995).

On the contrary to the abovementioned, a survey of 255 faculties participating in SUNY's distance education programme found that 96% of faculty reported 'satisfaction' with their experience teaching online courses. Eighty-five percent of faculty feel that teaching online would improve their classroom teaching too (Shea et al. 2002).

DiBiase (2000) asks the question: 'Is distance teaching more work or less?' DiBiase compares two courses, one online and one in a traditional classroom, and reveals that the online course requires more instructor attention and monitoring, but it does not require more overall time. Hislop (2001) also asks a question: 'Does teaching online take more time?' According to Hislop (2001:23) many instructors feel that teaching online takes more time, but there is relatively little data available on this issue. This study provides some support for the belief that teaching online may take more time than teaching face-to-face. However, the amount of difference tends to be small, and there are some suggestions that this relationship between teaching mode and time is more complicated than generally assumed. Bender, Wood & Vredevoogd (2004) research teaching time for a distance course and a face-to-face course. Results indicate that a distance course takes less time to teach than a face-to-face course, if student enrolment and assessment procedures are not included in the analysis. When analysed on a per-student basis, both faculty and teaching assistant time is higher for the distance course.

Several authors (Barclay, 2001; Carnevale, 2000; Dutton, Dutton & Perry, 2002; Embleton, 1999) reiterate that the whole online environment is different and this creates new problems that need to be solved.

Table 2.2 lists the abovementioned authors' problems and possible solutions. Barclay (2001), Carnevale (2000), Dutton *et al.* (2002) and Embleton (1999) still do not know how to resolve problems 5, 6, 7 and 10 as indicated in Table 2.2; therefore the questions marks against solutions 5, 6, 7 and 10.

**Table 2.2:** Problems and solutions for the online environment

Problems		Solutions	
1.	Student preparation.	1.	Tutorials, tours, help screens, frequently asked questions.
2.	The instructor is an information bottleneck.	2.	Peer tutoring, modelling of behaviour, peer mentoring, champions.
3.	Numbers.	3.	Appropriate distribution of learners into groups.
4.	Flaming <sup>1</sup> .	4.	Tone and interaction (Netiquette).
5.	Access (time on task).	5.	?
6.	Time.	6.	?
7.	Expectations.	7.	?
8.	Passive learning.	8.	<ul style="list-style-type: none"> <li>▪ Collaboration/problem-based learning.</li> <li>▪ Integrated (interactive) materials that engage the learners with the materials, the instructor and each other.</li> </ul>
9.	The technology.	9.	IRC, MOO/MUD, web-based messaging, e-mail and newsgroups.
10.	Meeting the instructor's goals.	10.	?

According to Abramov and Martkovich (2002), the main factors influencing satisfaction levels of students in online courses are delivery mode, collaboration and communication with instructors and peers. To ensure higher satisfaction levels in online courses, Abramov and Martkovich (2002:13-14) suggest that instructors do the following:

- Consider a kind of a 'license agreement' listing all the major points a learner has to know, and develop a mechanism that involves confirmation sent by every learner before actually starting studying. This needs to be done because about a quarter of online learners manage not to have found out what the prerequisites are until after they have started the course.
- Develop a screening test that enables the course administrator to screen learners who are either severely under-qualified.

<sup>1</sup> Flaming refers to making derogatory remarks or attacking another person via e-mail (Millennium Cable Speed, 2000)

- Provide tools (online tutorials, mini-training sessions, self-assessment tests, quizzes) and Frequently Asked Questions to learners. This ought to minimise the number of questions the instructor has to answer.
- Pay special attention to performance of learners during the first 2-3 weeks and offer additional help, if it is needed.
- Use encouragement sparingly; otherwise learners develop a feeling of being attended on by a 'babysitter'. This affects the learners' confidence and ability to learn independently. By no means may an instructor show irritation – even if the learner keeps asking the same question for the fifth time within one week.
- Learners have different learning styles: some are 'social learners' and work best in teams; others prefer working alone. Unless the nature of an assignment dictates otherwise, the option of working alone or joining a team should be left open.
- Inform learners that their papers will not be graded instantly. It usually takes 4-5 days for the instructor to grade 25 papers. If this point is not reiterated at the beginning of the courses, the learners tend to develop unrealistic expectations.

According to Reeves (2002), the roles of human teachers and digital technologies in tertiary education must be made as effective as possible. To date, there is not enough evidence about the demands of the online teaching on staff members, 'nor do we understand the most effective alignments of educational objectives, content, instructional methods and assessment strategies for online learning' (Reeves, 2002:7). Reeves (2002) urges for a different type of research agenda in the form of development research. This will provide a set of design principles that specialists and practitioners can apply to the development of effective digital learning environments (Reeves, 2002:7).

The person that has to make the biggest adjustment from the classroom environment to the online environment is the teacher, instructor and education staff (Murray, 2001). The 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).

Rogers (1969:164-166) lists the following ten Guidelines for Facilitation:

1. The facilitator is largely responsible for setting the initial mood/climate of the group.
2. The facilitator helps to elicit and clarify the purposes of the individuals in the class as well as the more general purposes of the group.
3. The facilitator relies upon the desire of each student to implement those purposes that have meaning to him/her as the motivational force behind significant learning.
4. The facilitator endeavours to organize and make easily available the widest possible range of resources for learning.
5. The facilitator regards himself as a flexible resource to be utilized by the group.
6. In responding to expressions in the group, the facilitator accepts both the intellectual content and the emotionalised attitudes, endeavouring to give each aspect the appropriate degree of emphasis that it has for the individual or the group.
7. As the classroom climate becomes established, the facilitator is increasingly able to become a participant learner, a member of the group, expressing his views as an individual.
8. The facilitator takes the initiative in sharing herself with the group – feelings as well as thoughts – in ways which neither demand nor impose, but represent simply a personal sharing which the student may take or leave.
9. Throughout the course, the facilitator remains alert to expressions indicative of deep or strong feelings.
10. The facilitator endeavours to recognize and accept his own limitations as a facilitator of learning.

The abovementioned information reveals aspects of adjustments that need to happen when changing from classroom-based instruction to learning in the online environment. It is also apparent that certain adjustments are critical to function in the online environment. For purposes of this study it is important to ask the question:

### **How did the facilitator adjust to the online environment?**

In the early days, distance education was synonymous with correspondence courses and was a lonely activity. During the learning process, students worked on their own with little contact with other students and teachers. With the change from 'teaching' to 'learning' (Barr & Tagg, 1995) and rapid technological innovations, distance education can be interactive and vibrant today. The paradigm underpinning interactive learning is based on the concepts of constructivism (Dick, 1991; Cyr & Conway, 1997) and focuses on supporting students to actively process the information they receive and construct new knowledge through their own experiences. The role of educators in this constructivist student-centred model is to provide students with a learning environment that encourages knowledge construction and reflection through social interaction with other students in a learning community (Palloff & Pratt, 1999).

#### **2.3.2. Conceptual framework for the online environment**

One of the biggest fears of first-time online facilitators is the belief that teaching from a distance is radically different from teaching face-to-face (Mantyla, 2000a; Murray, 2001). Although it is true that there are differences, it is also true that basic principles for teaching and learning online are the same as the basic principles for any teaching and learning environment (Williams *et al.* 1999:105). Instructors still need to address issues such as course purpose, learning objectives and the volume of information, but managing these areas calls for a different emphasis in a technology-based learning environment (Barclay, 2001; Carnevale, 2000; Embleton, 1999; Williams *et al.* 1999; Palloff & Pratt, 1999; Kearsley, 1998; Don'tTeachOnline, 2002; Lick, 2001; Levy, 2003; Shea *et al.* 2002; Care & Scanlan, 2001).

Irrespective of the teaching or learning situation, the following remains important (Seels & Glasgow, 1990; Rothwell & Kazanas, 1992; Gagne, Briggs & Wager, 1988; Fardouly, 1997; Flouris, 1989, Williams *et al.* 1999):

- Good instructional design produces good outcomes, and poor instructional design produces poor outcomes.
- Learning does not take place because of what the teacher does, but because of what the learner does.
- The measure of good instructional design is the meaningfulness of the learning that takes place.

Meaningful learning is defined as

*[L]earning in which individuals are helped to acquire needed knowledge, attitudes and skills to help solve real life problems*  
(Williams *et al.* 1999:106).

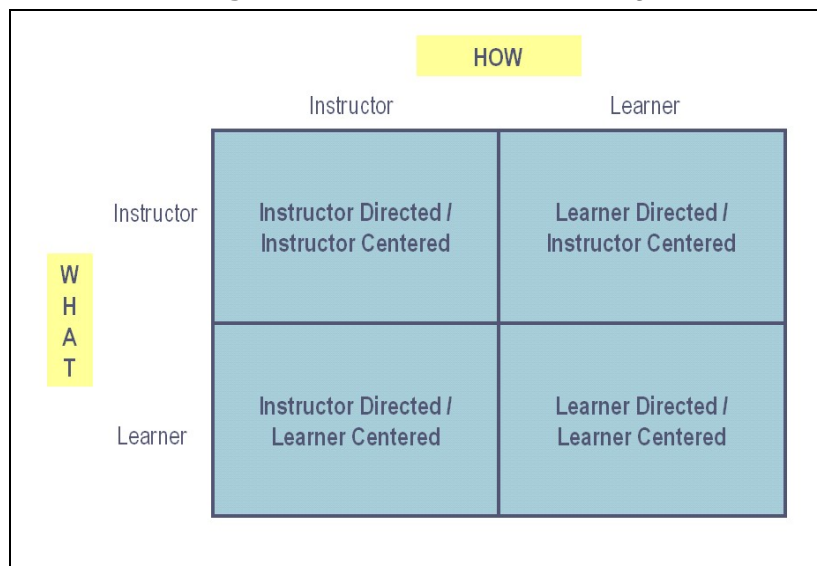
Meaningful learning provides the learners with the opportunity to discuss, argue, negotiate and reflect upon existing beliefs and knowledge. The learner is 'involved in constructing knowledge through a process of discussion and interaction with learning peers and experts' (Harasim, 1989:51).

Meaningful learning occurs when learners are drawn into the learning activity. For the purpose of this study, the Paprock and Williams (1993) 2 x 2 matrix on Models of Teaching will be used as the conceptual framework, because it emphasises the relationship between meaningful learning and the extent to which learners are involved in 'what' is taught and 'how' it is taught. The more involved the learner is in defining the learning equation, the more interaction and participation will occur.



Figure 2.1 provides a graphical representation of the Models of Teaching. Figure 2.1 suggests that in any teaching and learning process, there are two elements to consider: 'what' is learned and 'how' it is learned (Williams *et al.* 1999:107). The decision made about the relationship between these two elements affects the extent of participation and interaction.

**Figure 2.1:** Models of Teaching



The extent of participation refers to various levels of participation – mental, physical and emotional – that keep learners involved in the learning process (Williams *et al.* 1999; Moore, 1989; Palloff & Pratt, 1999) namely:

- Talking
- Writing
- Watching
- Thinking and
- Doing.

In high-technology online environments, the key to creating interactive and participative learning environments is not getting so wrapped up in the technology that the technology drives the method (Parkin, 2001).

The Paprock and Williams' Models of Teaching (1993) address the learner-centeredness that the online environment is creating. Learners need to participate and discover in the online environment, using synchronous and asynchronous

communication tools to become part of the learning community to acquire knowledge, attitudes and skills to help solve real life problems. But, as Mazoué (1999:109) states

*Learner-centered does not mean you're on your own, pal!*

The facilitator, on the other hand, is the person that assists, guides, encourages and supports the learners *en route* to enable the learners to take control and responsibility for their own efforts and achievements (Bentley, 1994). Participating in *CyberSurviver* revolved around learner-centeredness. The online facilitator set the tone and provided the framework for the modules as well as information on assignments, assessment criteria, communication tools and collaboration exercises. The learners were at the centre of the learning experience and interacted with each other via talking, writing, watching, thinking and doing.

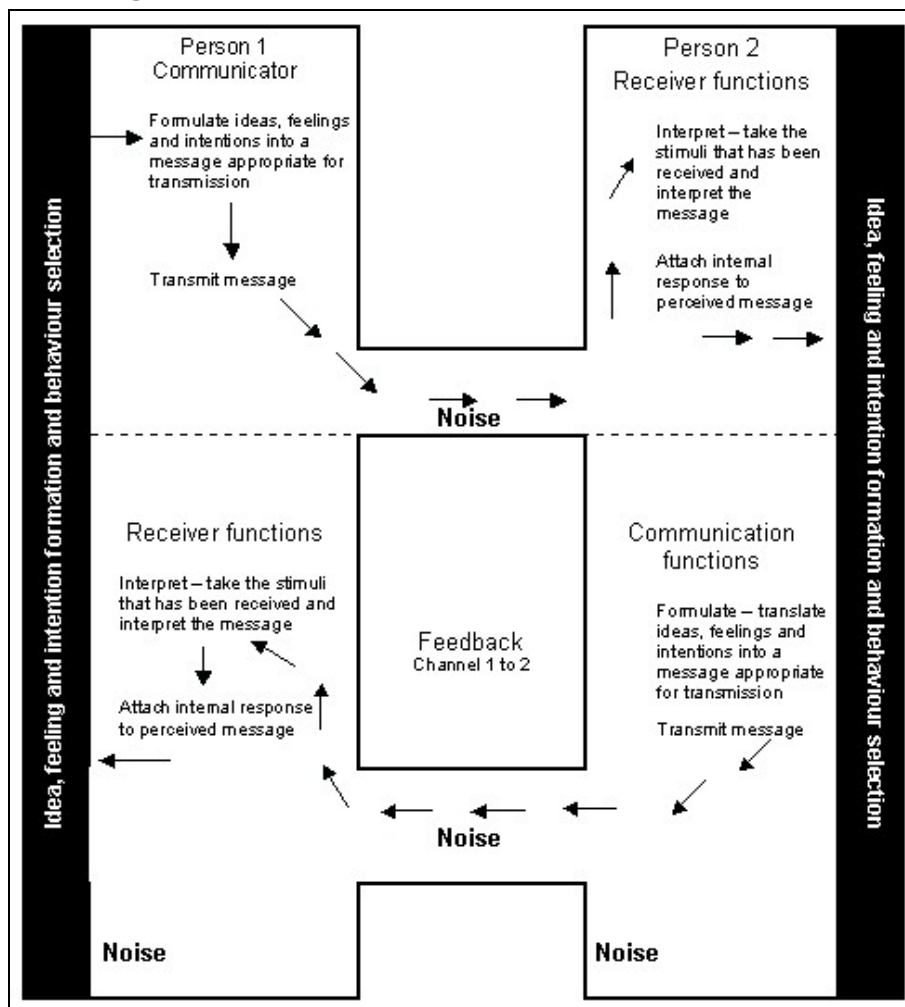
## **2.4. Theme 2: 'Talking' online**

### **2.4.1. Literature review**

Communication is one of the most important basic human activities. Although people spend most of their waking time in some form of communicating activity, people do not pay enough attention to how they communicate. It is important to understand how communication takes place to enable people to handle communication breakdowns (Johnson, 1981).

Face-to-face communication in its broadest sense is seen as the two-way process by which certain information is conveyed or transmitted from a communication source to a receiver, who in turn reacts to a stimulus (Van Schalkwyk, 1988:1). Figure 2.2 provides a graphical representation of the nature of face-to-face communication (Johnson, 1981:22).

**Figure 2.2:** The nature of face-to-face communication



Face-to-face communication is a process where people send one another symbols to which certain meanings are attached. These symbols can be either verbal (words) or non-verbal (facial expressions and gestures). All communication affects the relationship between people in one-way or another. The communicator formulates ideas or feelings into a message and sends the message along a channel. The channel can be any means by which the messages are transmitted and received. The message is any information that is sent through words (verbal) or through physical behaviour (non-verbal). For communication to be successful, there must be a receiver who interprets the messages and gives feedback. Feedback is the response or the reaction of the

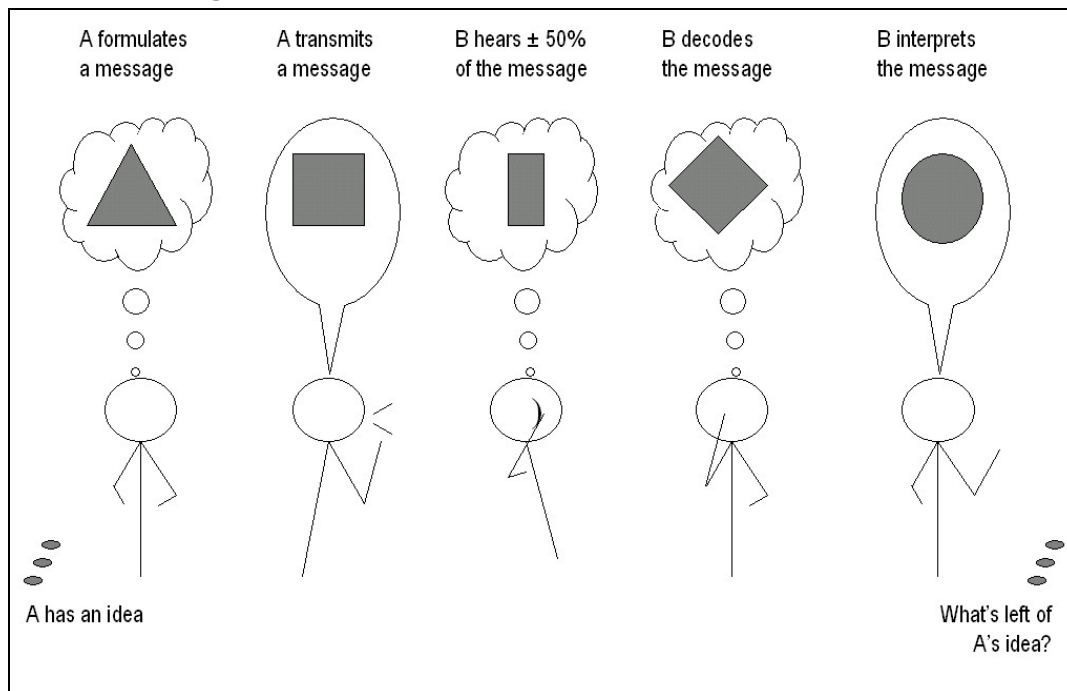
receiver that the sender observes. Noise is ever present in the communication process and is any element that interferes with the communication process.

In the communicator/sender (Johnson, 1981:30), noise refers to *inter alia*:

- Confused thinking. The inability to be able to provide the recipient with a clear picture of what the communicator intends to say.
- Line-loss distortion. Every time a message is repeated, another layer of meaning is added, leading to distortion and lack of clarity.
- Obfuscation, using obscure words that lead to misunderstanding.
- Emotional distortion. Feelings can twist a person's judgment for selecting the correct word with the appropriate meaning.
- Ignoring feedback. If the communicator ignores what the other person is telling him/her, the message can be lost.
- Language. Use words and sentence construction that most people understand. Talk the talk of the receiver.

In the receiver (Johnson, 1981:35), noise refers to *inter alia*:

- Not listening.
- Emotional distortion. Feelings can obstruct the interpretation of the message.
- Selective interpretation. People hear what they want to hear.
- Ignorance. If the recipient does not have a clue what is said, the message is lost.
- Language. If the receiver does not use the same language, the message is lost.
- Feedback. If the recipient does not indicate that s/he understands the message, ineffective communication has taken place.

**Figure 2.3:** A face-to-face communication breakdown

One of the problems that is found in face-to-face communication is the issue of expressing ideas in such a way that there is little chance of misunderstanding (Brockbank, 1998:181) as is graphically presented in Figure 2.3. It is through experiencing and expressing feelings that relationships are built and maintained and although feelings and emotions are internal states of mind, overt behaviours are used to communicate them to other people (Van Schalkwyk, 1988). The more adept an individual is in expressing feelings, the better this person will be in responding to the problems of others.

The term 'online communication' refers to reading, writing and communication via networked computers. It encompasses *synchronous* computer-mediated communication (whereby people communicate in real time via chat or discussion software, with all participants at their computers at the same time); *asynchronous* computer-mediated communication (whereby people communicate in a delayed fashion by computer, using programs such as e-mail); and the reading and writing of online documents via the World Wide Web (Warschauer, 2001). Nesis (2000) defines online communication as using communication technologies to interact by passing and receiving information online.

There is a distinct difference between face-to-face communication and online communication. In face-to-face communication there are many subtle cues provided by body language and vocal intonation. When meeting people face-to-face, there is a clear sense of what is appropriate in the way people act and communicate.

Communication researchers have consistently found that non-verbal cues are the

dominant source of meaning in interpersonal communication (Mehrabian, 1972). Meeting people over the Internet similarly requires a certain level of awareness. On the Internet, body language such as smiles, a nod of the head or a disapproving look cannot be seen and the tone of a person's voice cannot be heard. A pun made with a grin in a face-to-face situation may come across entirely differently in an e-mail message. Proper form and following rules are important in most human undertakings for example, proper table manners, proper greeting, stick to the rules of the road. Online communication has its own protocol and it is important to abide by online netiquette (Shea, 1994; Angell & Heslop, 1994; Lewis, 2000).

According to Warschauer (2001) newsgroups, e-mail, chat rooms and instant messages mostly use written English and suffer from the limitations of written English because it lacks a consistent method to convey non-verbal communication. Tone of voice, body language, facial expressions and gestures, which are common in face-to-face communication, are difficult to transmit in writing. The main method used to transmit emphasis and tone of voice is sentence structure and punctuation. There is no real way to communicate hand gestures or body language. Facial expressions can be mimicked by 'emoticons' or 'smileys', but even these fall short!

Online communication suffers from an immediacy that written English doesn't. When talking to someone in a chat room, the person sees everything that is typed immediately, just as if it is spoken. Then the other party reacts appropriately or inappropriately, and does so quickly to keep the conversation going. The same conversation spoken face-to-face, or over a telephone, would not present the same potential for misunderstanding because of non-verbal cues given in the tone of voice and facial expressions. This fast rate of information exchange contributes to misunderstandings (Warschauer, 2001).

The online communication complexities can lead to anxiety and hostility. Exchanges can quickly blow out of proportion. Users react and use insulting language and 'flaming' occurs, which is defined as electronic messages that express startlingly blunt, extreme and impulsive language. 'Flaming' involves online conflict that erupts into personal or rude attacks (Shea, 1994). A 'flamer' often says things online that s/he would never say to another person in a face-to-face situation (Sproull & Kiesler, 1992).

Individuals in the online environment are relatively more uninhibited. Flaming is one outcome of this dynamic. Online members are also more willing to disclose personally sensitive information about themselves in contrast to face-to-face interaction. Students often comment that they quickly come to know their virtual classmates much better than

co-workers or neighbours, even when the latter relationships have been for a long duration (Siegel, Dubrovsky, Kiesler & McGuire, 1986).

Status differences play less of a role in the online environment. The fact that a person is 'the instructor' or 'the manager' has less of an inhibiting effect on the interaction. Instructors who are accustomed to the traditional lecture method might be surprised by the 'cheekiness' of online students (Sproull & Kiesler, 1992).

Interaction in online groups tends to be more evenly distributed among group members. Students often comment that they engage in online discussions to a much greater degree than when in a traditional classroom. Everyone has equal access to the instructor and to the interaction in the online environment (Kiesler, 1984).

Online consensus decision-making takes significantly longer than when group members interact in a face-to-face environment. It tends to be more difficult for online groups to reach agreement. It can be tough for groups of more than three students to efficiently complete their work (Kiesler, 1984).

Lewis (2000:17) suggests that there is a 'WRITE' way to communicate online. This way involves communicating online in a manner that is **W**arm, **R**esponsive, **I**nquisitive, **T**entative and **E**mpathetic. An explanation of each component is discussed below.

**Warmth** does not mean to give people the electronic equivalent of sloppy hugs and kisses; it rather means to decrease the distance among participants. Being warm online is a way of reminding others that it is 'people who are engaged in communication, not software' (Lewis, 2000:17).

Instructors can include online warmth in the following ways:

- Use the telephone when necessary.
- Send sensitive information to private mailboxes.
- Incorporate warmth into written text – write something about your family and your interests.
- Describe the setting from which you are writing or the music to which you are listening. Online warmth of this kind helps students place you in a human setting.
- Play with language by making use of 'emoticons' – send the occasional virtual bouquet of roses: --<-<@--<-<@

**Responsiveness** – online communication is usually asynchronous. This means people have to wait several days before getting a response to a message. The instructor needs to set deadlines in terms of when students can expect feedback and this action reduces anxiety and creates expectation on the part of the students. Try to return personal messages as soon as possible. Provide occasional reminders to students.

**Inquisitiveness** – defensiveness is reduced if people ask questions rather than make statements. It is usually more constructive to ask a person ‘why’ than it is to tell a person ‘what’. Inquisitiveness provides information that is useful for solving a problem or resolving an issue.

**Tentativeness** – defensiveness is reduced if people read, “It appears that ...” as opposed to “It is ...”. Use “I-messages as opposed to “you-messages”.

**Empathy** – instructors need to put themselves in the shoes of their audience and consider the position of the students. A wide variety of issues should be kept in mind, *inter alia*:

- A student can still be an effective contributor even if s/he misspells words or uses poor grammar. Be lenient in the informal class discussions.
- Sometimes students send reasons for failure to perform. Consider the students and their hectic lives.

A facilitator should ‘talk’ to his/her students and a facilitator who fails to pay special attention to these areas will run into problems. The components of ‘teacher talk’ (Hiss, 2000:24) include control talk, humour, special language and an andragogical approach. An explanation of each component is discussed below.

**Control talk** refers to any communication used by an online facilitator to set tone, to clarify expectations and to convey meaning that is understood by all participants. The facilitator needs be responsive to each student’s problems and must have a ‘caring persona’ (Hiss, 2000:25) rather than one that is cold and aloof. Messages sent by the facilitator should come across naturally, as though they were speaking to the student in a face-to-face situation. Students, in turn, tend to model the facilitator’s communication style, contributing to a warmer online environment. Students take their cues off the facilitator. Facilitators should never lose their temper or be sarcastic online. A facilitator who is not very ‘visible’ will likely have students who are also not visible.



Effective control talk helps to set a productive tone in the online environment; it clarifies expectations and creates a structure that contributes to learning. Useful hints for control talk include the following:

- Reply to student autobiographies with a personal note about something the student said. Online students love to be warmly welcomed. Talk about their dogs, children, and hobbies – anything not related to work or school.
- Compile the syllabus and have it ready to go at the start of the online course and include when assignments are due and the points or percentage of the grade for each assignment.
- Upload class materials the day prior to using the actual materials.
- Answer questions as soon as possible, but not later than 24 hours.
- Never leave the online class for an extended time without telling the students when you will be back.
- Try to send students a handout, message, thought for the day, or something every day – online students need to know that you are there!
- Give feedback and grades on a regular schedule every week. Online students hate not knowing how they are doing and include some positives in the feedback.

**Humour** promotes novelty, divergent thinking, creative problem solving and risk taking. Laughter in the classroom is a sign that students enjoy the learning process rather than viewing it as dull and boring – a smile can come right through the computer monitor via the facilitator's words (Hill, 1988). Humour should always be G-rated (Gold rated), indicating that the facilitator should stay away from any racial, ethnic, gender-related, political, religious, gay or alternative lifestyle humour (Hill, 1988; Watson & Emerson, 1988; Gilliland & Mauritsen, 1971).

**Special language (emoticons).** In face-to-face situations, facilitators use non-verbal expressions to communicate in conjunction with words. However, online facilitators must depend exclusively on words. Use emoticons to clarify meaning – use emoticons that the students are familiar with! Communicate in a conversational manner, as opposed to an academic tone (White, 2000).

**Andragogical approach.** One of the biggest mistakes an online facilitator can make is to treat the students as children. A facilitator who ‘talks down’ to students or patronises them can expect problems. Another mistake that facilitators make is to communicate as though they are the only experts in the class. An adult-centred approach assumes that students can bring a wealth of information and experience to a class (Brookfield, 1988). In many cases, adult online students may be as knowledgeable as the facilitator in a particular area. The facilitator should make such students feel comfortable about sharing their expertise without the threat of being reprimanded or ridiculed. A facilitator must take care not to say too much or dominate discussions because students have a tendency to ‘clam up’ (Hiss, 2000:35).

There are three requirements for effective communication (Herring, 1996:35-47).

These requirements are *inter alia*:

1. **The skill of sending messages:**

- Clearly ‘own’ your messages by using first person singular pronouns. Personal ownership means taking responsibility for the ideas and feelings that are expressed.
- Make the messages complete and specific. Include clear statements with all the necessary information.
- Be redundant. Repeat messages more than once and through different channels.
- Ask for feedback concerning the way the messages are being received.
- Describe feelings by name, action or figure of speech – be descriptive.

2. **Sender credibility** – this refers to the attitude the receiver has toward the trustworthiness of the sender and is affected by the following:

- The reliability of the sender as information source.
- The intentions or motives of the sender.
- The expression of warmth and friendliness.
- The majority opinion of other people concerning the trustworthiness of the communicator.

- The expertise of the communicator.

### 3. Optimal feedback:

- Focus feedback on the person's behaviour and not on his/her personality.
- Focus feedback on descriptions rather than judgments.
- Focus feedback on a specific situation rather than on abstract behaviour.
- Focus feedback on the 'here and now' rather than the 'there and then'. It serves no purpose to refer to something that happened two years ago.
- Focus feedback on sharing feelings and perceptions rather than on giving advice.
- Do not force feedback on other people. Feedback is given to help people become more aware and not to preach to them. Feedback should serve the needs of the receiver, and not the needs of the giver.
- Do not give people more feedback than they can understand at the time.
- Focus feedback on actions that the person can change and suggest alternatives.

'The giving and receiving of feedback requires courage, skill, understanding and respect for yourself and others as well as involvement' (Myers & Myers, 1992:15). Do not give feedback lightly. The person giving feedback should ensure that s/he is willing to be responsible for what is said and that the timing of the feedback is appropriate. The purpose of feedback is to increase other people's self-awareness and positive feelings. To invest in a relationship by providing accurate and realistic feedback is a sign of caring and commitment (Myers & Myers, 1992).

Listening forms part of communication (Johnson, 1981). The problem with listening is that people believe that it is the same as hearing and that it is something that occurs naturally. The fact is that listening well takes effort and time. Listening involves understanding, analysing and evaluating the communicated message. Listening is one of the important contributions a person can make to building relationships. The listener shows care through confirming or disconfirming responses. Confirming responses include direct acknowledgement of someone's message, agreement about content, asking for more information and giving positive feedback. Disconfirming responses

include ignoring what someone has said and making irrelevant or impersonal responses.

Listening is one of the facilitator's most useful tools (Bentley, 1994:10). For facilitators there are probably six main situations in which they will have to listen. In each of these, the objective of the listening will differ (Bentley, 1994:10-13):

1. **Monologue.** One person talks, extensively and continuously, without any apparent interest in whether people listen. This is more a process of 'saying what I want to say'. In this situation facilitators have to listen for the underlying message or reason for the monologue.
2. **Dialogue.** This is the exchange of thoughts, feelings, ideas and opinions between two or more people. The key to listening in this situation is to grasp what the other person is saying so that a relevant response can be made. There is an implied process of taking turns to speak and listen.
3. **Conversation.** This action is less formal than dialogue and seems to be an opportunity for people to engage in sharing information. There is no particular need to respond to what someone else has said, nor to talk about the same things, though there is usually some link between what people are saying. For facilitators, the aim is to try to define the central theme of the conversation.
4. **Discussion.** A discussion is a focused conversation on a particular topic. It is an opportunity for people to offer their views. Facilitators need to listen for the consensus, and to pick out the various themes, i.e. the essence of the group's views. In addition, it is important to notice where differences exist between group members.
5. **Debate.** This exists when there are particular views being expressed for and against some particular theme. The debate might be an organised one, or one that arises from a discussion, but facilitators has to spot the difference. In a debate, facilitators need to be impartial.
6. **Argument.** This usually occurs as the final expression of contrasting views between two or more people. When agreement has not been reached, and if it is important to the parties engaged in the debate that their views hold sway, then we have an argument. In this situation, facilitators have to listen clearly to what each party is saying and try to define some common ground. Facilitators should not take

sides, but remain respected listeners who can summarise and reflect back the relevant positions of the parties.

According to Mazoué (1999:108), instructors should provide as much ‘personal’ contact as possible and convey a sense of their own sustained involvement in and commitment to an online course.

The abovementioned information reveals various aspects of ‘talking’ in the online environment. For purposes of this study, it is still important to ask the question:

### **How did the online facilitator ‘talk’ to the learners and encourage dialogue with the learners?**

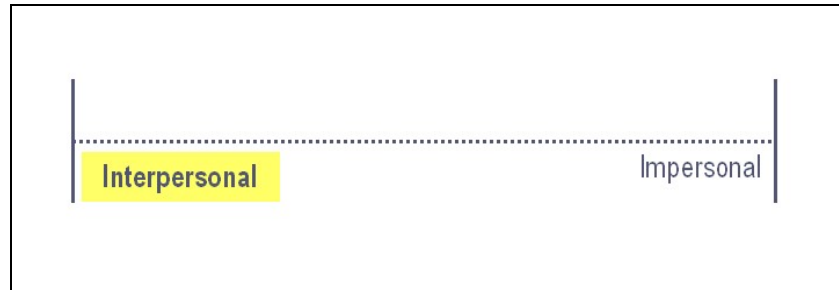
To establish rapport with a group and to be warm and responsive towards learners suggest that the online facilitator needs to form a bond with the learners. This bond can only be formed if the online facilitator is willing to move toward an ‘interpersonal’ approach towards the learners as is described in the conceptual framework below.

#### **2.4.2. Conceptual framework for ‘talking’ online**

Interpersonal communication is often regarded as face-to-face communication that happens between two people – such as between employer and employee, husband and wife, teacher and student. ‘Interpersonal’ can also be defined as a type or quality of communication that can be present in a range of settings – on the telephone, through writing, in groups and even on the computer (White & Weight, 2000:4). The online environment is technologically dependent, and online facilitators need to alter their interpersonal metaphor and think about the quality of online communication.

Stewart (1990) offers a way with his Interpersonal-Impersonal Continuum as is depicted in Figure 2.4 (White & Weight, 2000:4). This metaphor encompasses the many possibilities for interpersonal communication in the online environment.

**Figure 2.4:** The Interpersonal-Impersonal Continuum



The continuum reiterates that interpersonal communication is not restricted to face-to-face situations or a number of people, but is a result of the choice the online facilitator makes in the online environment. The continuum functions by accentuating that a person may choose to place a communication situation anywhere on the quality spectrum. It is no longer a question of ‘either’ impersonal ‘or’ interpersonal communication, but of degrees. No matter what the situation, the Interpersonal-Impersonal Continuum assumes that a person has a choice to be more or less interpersonal. Stewart (1990:16-18) suggests that there are three reasons for making the choice to be more or less interpersonal in communication situations, considering that communication means dealing with people. The three reasons are *inter alia*:

1. One chooses to be more interpersonal in order to focus on what makes the other person unique. In the online environment, messages are likely to show less social awareness, politeness and concern for the individual. Online facilitators must create opportunities for students to share their unique experiences and traits.
2. One chooses to be more interpersonal in order to show respect for a person’s ability to think and make choices. Online facilitators must recognise that their students are thinkers and give them tasks that are complex enough to be challenging, but simple enough to accomplish. Successfully challenging an online student requires a high level of open communication and feedback between online facilitators and students.
3. One chooses to be more interpersonal in order to pay attention to relevant feelings and to the whole human being. Humans have feelings and the online environment is an emotional environment. Online messages can be blunt and escalate into flaming. Online facilitators can help develop the whole student by establishing a

positive and supportive emotional climate through using techniques such as 'emoticons', effective conflict management and constructive feedback.

Facilitation is a word that describes an activity and it is something that someone does. It is a process, yet it also includes non-action, silence and even the facilitator's absence (Bentley, 1994). The word facilitate is derived from the Latin *facilis* which means 'to make easy' and dictionary definitions vary, for example:

- To free from difficulties and obstacles, to make easy.
- To lessen the labour of.
- To render easier, to promote, help forward.
- To make easier or less difficult; help forward (Random House Webster's College Dictionary, 1991:477).

The way day-to-day learning and talking functions in the online environment is a result of how the online facilitator perceives communication and its relationship to human beings. According to Rykert (2002:1):

*Good online facilitation is partly good listening, partly good timing and the ability to be tuned in to what the group is trying to accomplish.*

Online students are unique and online facilitators should choose to be interpersonal and to look for opportunities to treat online students as thinking human beings and to render support and guidance. Online learning is not just about the transmission of information. It depends on a friendly, relaxed and hospitable atmosphere with a facilitator who shows respect for students, who is concerned about their needs and who is supportive. 'Facilitator finesse' (my terminology) can only be attained if the online facilitator makes a deliberate decision to be more 'interpersonal'.

## 2.5. Theme 3: Facilitator roles

### 2.5.1. Literature review

With the emergence of the World Wide Web there has been a major shift from instructor-centeredness to learner-centeredness in online courses (Howard, 2003; Kearsley, 1998; Makin, 2002; Kimball, 1995; Drago, Peltier & Sorensen, 2002). The instructor is no longer the primary source of information for the learner who now has access to indefinite sources of information. The role of the instructor has moved from that of 'sage on the stage' to that of 'guide on the side' (Collison, Elbaum, Haavind & Tinker, 2002) to more recently, 'host on the post' (Ambrose, 2001). The learner no longer depends primarily on the perceptions of the instructor, but develops his/her own ideas and constructs his/her learning from multiple sources (Howard, 2003). An instructor now needs to step back from the limelight, facilitate the learning process (Gunawardena, 1992) and provide support through asynchronous text messages (Broadbent & Legassie, 2002). As Mazoué (1999) notes, the role of the instructor is to support learners as 'informational explorers'.

In addition, the online instructor must compensate for the lack of physical presence by creating a supportive environment where learners feel comfortable participating and particularly where learners know that their instructor is accessible (Hobgood, 2003; Palloff & Pratt, 1999). However, Bischoff (2000:58) states:

*The key to online education's effectiveness lies in large with the facilitator.*

Mason (1991) suggests that faculty teaching online must play both intellectual and social roles. There must be a balance between subject matter (content) and personal exchanges (non-content matter) (Dede, 1996; Moller, 1998). The most important role of the instructor in online classes is a 'high degree of interactivity and participation' (Kearsley, 1998; Broadbent & Legassie, 2002). Effective online teaching consists of instructor 'visibility and frequent and timely feedback' (Bischoff, 2000). A facilitator who is not very 'visible' will likely have students who are also invisible (Hiss, 2000).

Facilitators should post notes regularly to their class and their names should appear frequently (Hiss, 2000).

Although the facilitator is now considered to be a 'guide on the side', it is important that the facilitator remains **visible** (Bischoff, 2000 – my emphasis) and has a **strong presence** (Schweizer, 1999 – my emphasis), also referred to as **teaching presence** (Anderson, Rourke, Garrison & Archer, 2001 – my emphasis). Instructors have to be



'seen' in order to be present in the online asynchronous environment (Picciano, 2002). It is the online presence of the instructor, the knowledge that the instructor is 'out there' that matters most to the students (Smith, Ferguson & Caris, 2002; Woods, 2002). The instructor has to be available everyday because learners expect instant responses (Arsham, 2002:10). In online courses learners 'demand more feedback, and the more feedback they receive, the more interaction they want' – learners develop a 'type of intimacy' in their communications with instructors that rarely manifests in face-to-face classrooms (Brown, 1998:3). If students are required to post a certain number of messages each week, then online instructors should maintain at least the same level of participation as students (Bischoff, 2000; Graham, Cagiltay, Lim, Craner & Duffy, 2001). Infrequent interaction with instructors was one of the reasons given by students for not completing distance education courses (Wilkinson & Thomas, 1991). Online learners require support and guidance to make the most of their learning experience. This support takes the form of a combination of student-instructor interaction and student-student interaction (Threlkeld & Brzoska, 1994). Learners value timely feedback regarding course assignments, exams and projects (Woods, 2002; Hootstein, 2002) and learners benefit significantly from their involvement in small learning groups (Kearsley, 1998; Dillenberg & Schneider, 1995; Palloff & Pratt, 1999; Barclay, 2001; Moore, 1989) because these groups provide support and encouragement along with feedback. Learners are more motivated if they are in frequent contact with their instructor (Ambrose, 2001; Barclay, 2001). The participation of the online facilitator is crucial for successful learning in asynchronous online environments (Blignaut & Trollip, 2003) and 'what is' certain is that some students are positively affected by receiving instructor-initiated personal e-mail messages outside the required group discussion formats (Woods, 2002:389).

It is apparent from the literature that there are a vast number of roles that the online facilitator could fulfil. However, it is important to note that no clear indication is gained as to which roles provide visibility for the online facilitator and which role the instructor should play in terms of contributions to the discussion group (Blignaut & Trollip, 2003:2).

Although the individual authors never list more than seven online facilitator roles at a time, when synthesised, these roles amount to at least 23 different roles. What is also evident is that some of these roles overlap and could possibly be integrated into already mentioned roles. Choden (2002) suggests that the various roles could be divided amongst several people, both in synchronous and asynchronous mode. Although

authors list responsibilities for the respective roles, it is often unclear how to go about fulfilling the particular responsibilities, because no guidelines or examples have been provided to assist a newcomer to optimally engage in the roles. Tables 2.3 to 2.25 provide a summary of the various roles and responsibilities of the online facilitator as synthesised from the literature.

The role of the learner reiterates the fact that an online facilitator should have participated in an online course prior to conducting an online course. Various references were made to this role as is indicated in Table 2.3.

**Table 2.3:** Role of Learner

Responsibilities	Reference
<ul style="list-style-type: none"> <li>▪ Learn the technology.</li> <li>▪ Learn in this new environment.</li> <li>▪ Participate before you facilitate.</li> <li>▪ Practice, practice, practice!</li> </ul>	Choden (2002) Peté <i>et al.</i> (2002) Zorfass <i>et al.</i> (1998)

The role of 'learner' would be a pre-requisite for any online facilitator.

The literature refers to 'administrative' tasks or duties but does not stipulate an administrative role *per se*. I have taken the liberty of including a role of administrator as is reflected in Table 2.4. The role of administrator is to plan, organise and monitor the learning intervention.

**Table 2.4:** Role of Administrator (my terminology)

Responsibilities	Reference
<ul style="list-style-type: none"> <li>▪ Set course agenda, rules and decision-making norms.</li> <li>▪ Post course materials at the beginning of the course.</li> <li>▪ Post timely bulletins about changes and updates to the course.</li> <li>▪ During first week, assure that all learners are 'on board'.</li> <li>▪ Return learner calls/e-mails within 24 hours.</li> <li>▪ Record questions asked in the session's chat function.</li> <li>▪ Refer learners' problems to advisors.</li> <li>▪ Provide statistics.</li> <li>▪ Track learner participation.</li> </ul>	Choden (2002) Learning Peaks (2001)

The role of a change agent encompasses helping people adapt to the changes brought on by new technologies as is reflected in Table 2.5.

**Table 2.5:** Role of Change Agent

Responsibilities	Reference
Be an advocate for the virtual classroom within your organisation	Choden (2002)

The role of coach guides the learner/s to build knowledge as appears in Table 2.6.

**Table 2.6:** Role of Coach

Responsibilities	Reference
<ul style="list-style-type: none"> <li>▪ Assist learners learning in self-study mode.</li> <li>▪ Comment on implications of comments made by learners.</li> <li>▪ Elicit conversation and foster reflection.</li> <li>▪ Encourage interactivity to foster the building of knowledge.</li> <li>▪ Encourage learners to discuss issues and collaborate with each other to generate solutions to problems.</li> <li>▪ Guide learners to post and read messages.</li> <li>▪ Guide learners through weekly tasks and activities.</li> <li>▪ Keep learners motivated and focussed on the instructional objectives of the course.</li> <li>▪ Organise the particulars of the project.</li> <li>▪ Orientate the learners.</li> <li>▪ Provide both support and challenge.</li> <li>▪ Work one-on-one with an individual and with the group.</li> <li>▪ Suggest schedules for communications and time lines for project activities.</li> </ul>	Ambrose (2001) Broadbent & Legassie (2002) Collison <i>et al.</i> (2000) Corley (1998) Harris & Figg (1994) McGee & Boyd (1995) Mazoué (1999) Regents of the University of Minnesota (2002) Rosenberg (2001) Zorfass <i>et al.</i> (1998)

This role is also referred to as the 'Guide on the side' (Ambrose, 2001), the 'Reflective Guide' (Ambrose, 2001), the 'Tour Guide' (McGee & Boyd, 1995) and the 'Travel Guide' (Mazoué, 1999).

The role of communication expert focuses on applying effective communication methods in the cyberspace as is indicated in Table 2.7.

**Table 2.7:** Role of Communication Expert

Responsibilities	Reference
<ul style="list-style-type: none"> <li>▪ Understand various types of interactions, exchanges and instructional collaborations that succeed in the virtual environment.</li> <li>▪ Liaise with the subject matter expert.</li> </ul>	Harris & Figg (1994)

In the role of co-presenter the facilitator uses the team-teach approach for synchronous sessions as is reflected in Table 2.8.

**Table 2.8:** Role of Co-presenter

Responsibilities	Reference
<ul style="list-style-type: none"> <li>▪ Standby to sort out administrative concerns because the synchronous session must start on time.</li> <li>▪ Share the roles.</li> <li>▪ Act as a soundboard.</li> </ul>	Duckworth (2001) Rykert (2002)

The role of the facilitator focuses on assisting and guiding the learners during the learning process to optimally interact with the learning content, the subject matter expert and peers, as is described in Table 2.9.

**Table 2.9:** Role of Facilitator

Responsibilities	Reference
<ul style="list-style-type: none"> <li>▪ Assist and facilitate learners in their own informational explorations; this is not handholding.</li> <li>▪ Create a strong interactive learning environment.</li> <li>▪ Foster group learning.</li> <li>▪ Post thoughtful discussion questions related to the topic.</li> <li>▪ Draw abstractions from the discussions.</li> <li>▪ Ensure learners understand expectations and norms for respectful interaction.</li> <li>▪ Ensure learners know how to follow directions for carrying out the associated tasks and activities, both online and offline.</li> <li>▪ Plan with the teacher to ensure collaborative learning happens between the teacher, learners and subject matter expert.</li> <li>▪ Facilitate interactive information exchanges.</li> <li>▪ Look at overall co-ordination.</li> <li>▪ Provide guidance / comments as needed.</li> <li>▪ Help learners apply, analyse and synthesise content.</li> <li>▪ Raise the level of a discussion.</li> </ul>	Ambrose (2001) Broadbent & Legassie (2002) Haynes <i>et al.</i> (1997) Learning Peaks (2001) Mazoué (1999) McGee & Boyd (1995) Peté <i>et al.</i> (2002) Zorfass <i>et al.</i> (1998)

This role is also referred to as the 'Conceptual Facilitator' (Ambrose, 2001).

The role of the instructor is to create realistic problem-based experiences for the learners in order to achieve meaningful learning as is reflected in Table 2.10.

**Table 2.10:** Role of Instructor

Responsibilities	Reference
<ul style="list-style-type: none"> <li>▪ Ensure that the instructor has previous experience of conducting workshops or courses.</li> <li>▪ Focus on the learners rather than on the technology.</li> <li>▪ Create realistic problem-based experiences to make content meaningful for learners.</li> <li>▪ Focus on the learning process to achieve the outcomes.</li> <li>▪ Guide the learning process.</li> <li>▪ Question, support, lead and pace.</li> <li>▪ Help learners connect content with prior knowledge.</li> <li>▪ Provide explanations.</li> <li>▪ Provide the instructional program.</li> <li>▪ Provide individual feedback.</li> <li>▪ Post at least 10% of discussion postings.</li> <li>▪ Provide information to help learners complete assignments.</li> <li>▪ Suggest strategies and ideas for learning.</li> <li>▪ Use a teaching assistant or subject matter expert.</li> </ul>	Berge (1996) Choden (2002) Hootstein (2002) Learning Peaks (2001) Zorfass <i>et al.</i> (1998)

Berge (1996) refers to this role as the 'pedagogical' area. According to Hootstein (2002) the instructor role encompasses a consultant, a guide and a resource provider.

In the role of jovial nag the facilitator tenaciously insists on interaction from the learners as is described in Table 2.11.

**Table 2.11:** Role of Jovial Nag

Responsibilities	Reference
<ul style="list-style-type: none"> <li>▪ Become the persistent voice that prods learners into communicating in a timely and consistent manner.</li> <li>▪ Remind learners of interim project deadlines.</li> </ul>	Harris & Figg (1994)

The role of knowledge navigator reiterates the sharing of information, as is described in Table 2.12.

**Table 2.12:** Role of Knowledge Navigator

Responsibilities	Reference
<ul style="list-style-type: none"> <li>▪ Create a learning environment where information is treated as a group resource instead of a scarce commodity for which learners are in competition.</li> <li>▪ Encourage learners to provide information and resources.</li> <li>▪ Guide information sharing.</li> <li>▪ Guide learners to locate, review and download relevant messages, material and resources.</li> <li>▪ Provide additional resources.</li> </ul>	Choden (2002) Mazoué (1999) Volery & Lord (2000) Zorfass <i>et al.</i> (1998)

This role is also referred to as the 'Orchestrator of resources' (Choden, 2002).

In the role of learning catalyst the facilitator has to precipitate the learning that will occur as is indicated in Table 2.13.

**Table 2.13:** Role of Learning Catalyst

Responsibilities	Reference
<ul style="list-style-type: none"> <li>▪ Ask questions.</li> <li>▪ Be able to catalyse learners so that they can discover their own learning that is crucial.</li> <li>▪ Engage learners in many different levels – deconstruct the worldview but also reconstruct it and relate it to daily problems.</li> <li>▪ Observe learner reflections as they have time to think before posting a message.</li> </ul>	Inayatullah (1999) Owston (1997) Volery & Lord (2000)

This role is also referred to as the 'Creator of learning experiences' (Owston, 1997).

The role of listener emphasises that the online facilitator should listen to various conversations as is described in Table 2.14.

**Table 2.14:** Role of Listener

Responsibilities	Reference
<ul style="list-style-type: none"> <li>▪ Stay tuned in to the learners.</li> <li>▪ Promote lively and relevant discussions amongst learners without monopolising the discussion.</li> </ul>	Choden (2002) Harris & Figg (1994) Zorfass <i>et al.</i> (1998)

The role of manager encompasses the organisational, procedural and administrative duties per learning intervention as is listed in Table 2.15.

**Table 2.15:** Role of Manager

Responsibilities	Reference
<ul style="list-style-type: none"> <li>▪ Keep to the tasks, agenda, timetable, procedural rules and decision-making rules.</li> <li>▪ Manage organisational, procedural and administrative duties.</li> <li>▪ Develop study guides for courses to help ease learners' anxiety and address both content and technical concerns.</li> <li>▪ Provide introductory information; describe learning activities and resource information.</li> <li>▪ Help learners manage their time and avoid information overload.</li> <li>▪ Define expected learner behaviours through guidelines, protocols and netiquette.</li> <li>▪ Track learners.</li> </ul>	Berge (1996) Choden (2002) Hootstein (2002) Peté <i>et al.</i> (2002)

Berge (1996) does not refer to a role, but rather to the 'managerial' area.

In the role of mediator the online facilitator ensures fair play between all learners as is described in Table 2.16.

**Table 2.16:** Role of Mediator

Responsibilities	Reference
<ul style="list-style-type: none"> <li>▪ Ensure standards of fair play and network scholarship.</li> <li>▪ Focus the discussion on common ground when learners are disagreeing.</li> <li>▪ Intervene in situations that threaten to undermine course cohesiveness.</li> <li>▪ Provide technological assistance that supports learning goals.</li> <li>▪ Set up real-time chat.</li> <li>▪ Tend to help build consensus and move the discussion away from debate to finding common solutions.</li> <li>▪ Track down resources and materials that enrich the learning experience and sort out disputes.</li> </ul>	Ambrose (2001) Broadbent & Legassie (2002) Harris & Figg (1994) Mazoué (1999) McGee & Boyd (1995)

This role is also referred to as the 'Referee' (Mazoué 1999).

In the role of mentor the online facilitator becomes a trusted teacher to assist an individual learner on his/her learning path as is reflected in Table 2.17.

**Table 2.17:** Role of Mentor

Responsibilities	Reference
<ul style="list-style-type: none"> <li>▪ Establish an instructional bond and rapport that will reinforce learners' sense of commitment to specific learning objectives of the course.</li> <li>▪ Move towards a mentoring role rather than a didactic one; take time to establish academic relationships with individuals.</li> <li>▪ Provide motivational support.</li> <li>▪ Provide ongoing guidance.</li> </ul>	Mazoué (1999) Nichols (2002)

In the role of moderator the online facilitator assesses the work of each learner and group as is described in Table 2.18.

**Table 2.18:** Role of Moderator

Responsibilities	Reference
<ul style="list-style-type: none"> <li>▪ Model the language, discussion techniques and netiquette protocols necessary for quality communication in the online environment.</li> <li>▪ Review contributions.</li> <li>▪ Reflect on the learning.</li> <li>▪ Provide learners with clear grading criteria.</li> <li>▪ Remind learners about upcoming assignments.</li> <li>▪ Provide examples of desired writings and assignments.</li> <li>▪ Provide resource ideas for completing assignments.</li> <li>▪ Assist learners who are having problems (by e-mail or telephone).</li> <li>▪ Acknowledge receipt of assignments within 24 hours.</li> <li>▪ Return assignments with detailed notes and grade within 96 hours.</li> <li>▪ Contact learners who have not completed assignments within 24 hours after assignment due date. Help a learner work out a plan to complete the assignment.</li> </ul>	Ambrose (2001) Choden (2002) Learning Peaks (2001) McGee & Boyd (1995) Peté <i>et al.</i> (2002)

The role is also referred to as the 'Evaluator' (Choden, 2002).



The role of personal muse reiterates the fact that the online facilitator has to critique his/her own views on topics under discussion as is reflected in Table 2.19.

**Table 2.19:** Role of Personal Muse

Responsibilities	Reference
<ul style="list-style-type: none"> <li>▪ Question your own views.</li> <li>▪ Legitimise critiquing the instructor's views and open up the discussion.</li> </ul>	Ambrose (2001) Broadbent & Legassie (2002)

The role of role player encourages the online facilitator to take any other role to provide alternative perspectives as is described in Table 2.20.

**Table 2.20:** Role of Role Player

Responsibilities	Reference
<ul style="list-style-type: none"> <li>▪ Assume a role of another person.</li> <li>▪ Playfully assume the role as a 'teacher' on a Monday, flush with new ideas – the facilitator then presents alternative perspectives without concern for personal ownership or direct confrontation with learners.</li> </ul>	Ambrose (2001) Broadbent & Legassie (2002)

The role of social supporter reiterates the importance of a social, learning community as is reflected in Table 2.21.

**Table 2.21:** Role of Social Supporter

Responsibilities	Reference
<ul style="list-style-type: none"> <li>▪ Create a friendly environment in which a climate for learning is promoted.</li> <li>▪ Foster collaborative learning.</li> <li>▪ Establish, facilitate and maintain a learning community, as learning is a social activity.</li> <li>▪ Stimulate learner participation and interaction by using small group discussions, collaborative projects, case studies and one-on-one exchanges.</li> <li>▪ Monitor and participate in discussion forums to identify misconceptions.</li> <li>▪ Keep discussions focussed on the topic, bring out multiple perspectives and summarise main points.</li> <li>▪ Encourage and ensure a high degree of interactivity and participation.</li> <li>▪ Guide learners in working together to become more skilled in collaborative skills such as scheduling, project management, time management, consensus building and leadership.</li> </ul>	Berge (1996) Choden (2002) Hootstein (2002)

This role is also referred to as the 'Social director – Creator of collaborative environments' (Hootstein, 2002). Berge (1996) refers to this as the 'social' area.

In the role as starter the online facilitator takes an active role in initiating discussions and making contact with learners as is described in Table 2.22.

**Table 2.22:** Role of Starter

Responsibilities	Reference
<ul style="list-style-type: none"> <li>▪ Start the session.</li> <li>▪ Take an active role in providing or even initiating contact with learners when it is necessary to promote and foster their ability to function in an intellectually independent manner.</li> </ul>	Broadbent & Legassie (2002) Harris & Figg (1994) Mazoué (1999)

This role is also referred to as the 'Prompter' (Harris & Figg, 1994).

The role of subject matter expert reiterates the need that facilitators also need to be content experts as is indicated in Table 2.23.

**Table 2.23:** Role of Subject Matter Expert

Responsibilities	Reference
Ensure that the instructor has strong content knowledge.	Zorfass <i>et al.</i> (1998)

The role of tutor indicates instructing a learner what to do as is indicated in Table 2.24.

**Table 2.24:** Role of Tutor

Responsibilities	Reference
<ul style="list-style-type: none"> <li>▪ Provide information regarding netiquette, language, appropriate style of communication and online communication conventions such as emoticons.</li> <li>▪ Provide standards for virtual interaction.</li> </ul>	Harris & Figg (1994)

The role of technical fundi indicates the needs for good control of the technology and the ability to perform basic troubleshooting tasks as is indicated in Table 2.25.

**Table 2.25:** Role of Technical Fundi (my terminology)

Responsibilities	Reference
<ul style="list-style-type: none"> <li>▪ Make technology transparent, as learners have to concentrate on the academic task at hand.</li> <li>▪ Sort out technical problems.</li> <li>▪ Help learners troubleshoot technical systems used in the course.</li> <li>▪ Help learners become comfortable with the system and the software.</li> <li>▪ Refer learners to appropriate help sources, if needed.</li> </ul>	Berge (1996) Choden (2002) Duckworth (2001) Harris & Figg (1994) Hootstein (2002) Learning Peaks (2001)

This role is also referred to as the 'Technical assistant' (Hootstein, 2002) or the 'Technician' (Learning Peaks, 2001). Berge (1996) refers to this as the 'technical' area.

The 23 roles mentioned above reveal information regarding the various activities performed by the online facilitator. The problem is that 23 roles are too many to use and not manageable for an online facilitator. It is necessary to combine some of these roles, and to determine the relative importance of the various roles; so the following question still has to be asked:

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

The American Society for Training and Development (ASTD) hosted an online interactive discussion on the human side of e-learning, featuring guest expert Karen Mantyla (2000b:1) and she made the following comment:

*Without human interaction at each step, the technology just sits there waiting for something to happen. So much emphasis is placed on the technology that there needs to be a focused shift to people – they make it happen. The human side includes all learners, trainers ...*

Rosenberg (2001:308) concurs in the following way:

*With all the movement to technology-based learning, human interaction and sharing could be at risk. If e-learning does not have a human element – if people do not have opportunities to meet each*

*other and work with each other, face-to-face or online – we may not like what we'll get. ... In a technological world, we must continue to preserve the people-centric nature of learning.*

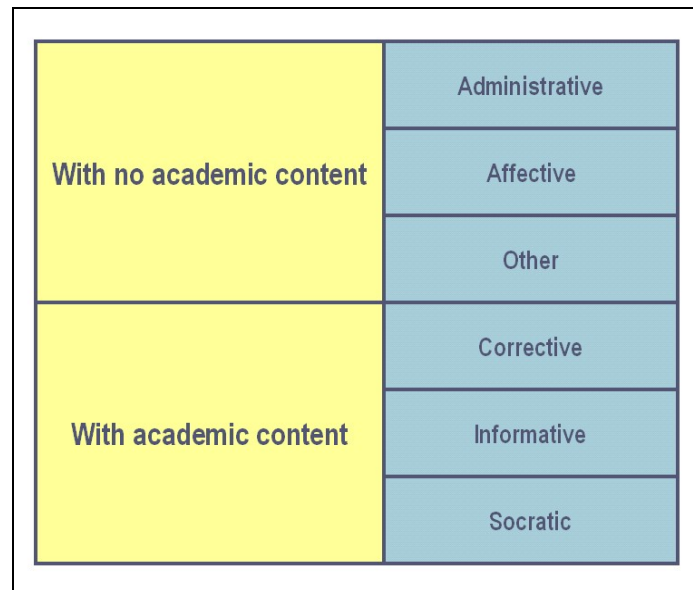
The abovementioned two quotations play an important part in positioning the roles of the online facilitator in a contextual framework. Although online learning emphasises learning via technology, it is clearly stated by Mantyla (2000b) and Rosenberg (2001) that the 'human element' of the learners and instructors cannot be ignored.

To analyse online facilitator postings it was important to select a classification scheme that would form a conceptual framework, considering the intellectual side as well as the social or people side of online facilitator postings and messages. The 23 roles already listed did not provide any indication for an intellectual dimension and people dimension or which roles were more visible to the learners. Very little information is available on models that encapsulate the intellectual side and social side of online messages. White and Weight (2000) provide examples of messages that online facilitators could write and Anderson *et al.* (2001:6-10) provide a coding scheme for Instructional Design and Organization, Facilitating Discourse and Direct Instruction. For the purpose of this study, the researcher selected the Blignaut and Trollip (2003) taxonomy of faculty participation in asynchronous learning environments. This taxonomy distinguishes between academic content and no academic content messages. Academic content would relate to the intellectual side of online messages because the sub-headings deal with corrective, informative and Socratic messages. No academic content would relate to the social side of online messages because the sub-headings deal with administrative, affective and other matters.

### 2.5.2. Conceptual framework for facilitator roles

The Blignaut and Trollip (2003) taxonomy was created from postings of instructors to categorise their attributes. Figure 2.5 provides a graphical representation of the taxonomy of instructor postings. The taxonomy provides clear examples of how to categorise the various instructor postings.

**Figure 2.5:** Taxonomy of instructor postings



An explanation of the taxonomy follows (Blignaut & Trollip, 2003:157):

#### **Administrative (with no academic content):**

Postings that relate to general administrative topics, such as dates, profiles, formats, functionality of software and many other organisational aspects, for example *Welcome to the class! I have recorded your preference for a letter grade. I look forward to your contributions to the class.* (Blignaut & Trollip, 2003:157).

#### **Affective (with no academic content):**

Postings that acknowledge learner participation and provide affective support, for example *I am enjoying your comments and especially the replies and threads that are forming. Keep up the great work!* (Blignaut & Trollip, 2003:157).

#### **Other (with no academic content):**

Postings that contain non-content related messages, as well as the posting of discussion topics, for example:

- *Here's the official wording! Discussion 2: Is consciousness at the heart of psychology or is it a concept outside the realm of psychology? Support your responses with references. (Blignaut & Trollip, 2003:157).*
- *To all the mothers in the class, a Mother's Day card ... (Blignaut & Trollip, 2003:157).*

**Corrective (with academic content):**

Postings that correct the content of a learner's posting, for example *You have talked about the instructional designer not being the project manager, however, you have listed several project management duties, e.g. under #7 to monitor: time spent, ... Please reconsider if these are project manager duties or ... (Blignaut & Trollip, 2003:157).*

**Informative (with academic content):**

Postings that comment on a learner's posting from a content perspective and provides individual feedback, for example *This is a fine posting, not only answering the questions but going into reflection and application of your experience to an attempt to solve the problem. In addition, while you took your own position based on your experience, you posed a counter argument, which is the essence of scholarly discussion. You make a fine example of good intellectual discourse, by raising the contrary arguments and treating them respectfully. Nicely done! (Blignaut & Trollip, 2003:157).*

**Socratic (with academic content):**

Postings that ask reflective questions (Socratic questions) about the learner's postings, for example *In your posting you took the position of a teacher. Please explain the same scenario from the position of a learner. (Blignaut & Trollip, 2003:157).*

## **2.6. Theme 4: Challenges and demands**

### **2.6.1. Literature review**

Almost anyone who has taught online would agree that the demands on online facilitators are different from those of face-to-face facilitators, although the general issues and situations with which they deal are, in essence, the same (Don'tTeachOnline, 2002; Barclay, 2001; Choden, 2001; Broadbent & Legassie, 2002; Dewar & Whittington, 2000; Parkin, 2001). Many instructors who receive positive evaluations from students in traditional classrooms find it difficult to adapt their style to a distance learning format (Clay, 1999).

The online facilitator must manage a course, guide learners throughout the learning experience, motivate the learners and interact with them, assess the learners and deal with conflicts or difficulties. Although each course must be understood within its own specific context, the teaching and learning settings, constraints of the environment, status of the learners and the online facilitator and the pedagogical model, several authors have identified challenges (Graham *et al.* 2001) or demands (Higgison, 2000) for the online facilitator. These challenges or demands are not discussed in terms of importance. It is also essential to note that these challenges and demands are taken from the online facilitator's perspective and not from a learner's perspective because it is the online facilitator that is scrutinised in this study.

#### **Challenge 1: Online facilitators are inundated with e-mail messages and bulletin board postings**

Instructors want to be accessible to online learners, but are worried about being overwhelmed with e-mail messages or bulletin board postings (Graham *et al.* 2001). Instructors fear that if they fail to respond quickly, learners would feel ignored (Young, 2002). While interaction is encouraged (Chickering & Ehrmann, 1996) it takes time to adjust to the promptness of responding to individual learner messages (Kochtanek & Hein, 2000).

#### **Challenge 2: Online facilitators have extended working hours**

It takes more time to teach in a virtual classroom than in a face-to-face classroom and the growth of e-mail, course Web sites, instant messaging software and online courses have forced many online facilitators to rearrange their daily routines to accommodate their learners (Young, 2002). According to Darling (2000), online facilitators need much

more time offline in preparation for the class, which includes creating extra materials and in addition, the time to respond to learners in writing. It takes about two hours to answer all questions and e-mail messages every day (Young, 2002). Teaching online takes three times as long as face-to-face teaching (Palloff & Pratt, 1999) and some universities consider teaching one course online to be the equivalent of teaching two face-to-face courses (University of Toronto, 2000; University of North Carolina, 2000). Teaching online takes 25% more time than teaching face-to-face (Schweizer, 1999). Online courses are more demanding and time consuming than face-to-face courses (Young, 2002; Coghlan, 2002). Asynchronous courses require approximately two to four times more facilitative interaction than a classroom-based course (Kochtanek & Hein, 2000). Apart from the fact that teaching online takes more time, some teaching staff make promises to their students that they will answer e-mail messages within 24 hours (Young, 2002) or even five hours (Darling, 2000).

Online practitioners report that they have developed an obsession when it comes to online courses – a mixture of curiosity and a sense that if they do not keep logging on, they might fall behind, but online teaching cuts into other activities such as research and time with the family (Shepherd, 2000b; Taylor, 2002; Mantyla, 2000a; Hofmann, 2001a). Without self-discipline, online classes can ‘eat up’ an online facilitator’s weekend – set aside time for the online classes and stick to it (Western Nevada Community College, 2001).

The time requirement comes as a shock to instructors who are not prepared for the frequent and heightened level of interaction with learners (Kochtanek & Hein, 2000). Instructors also need to check into the course interactions several times each day as a specific threaded discussion unfolds (Kochtanek & Hein, 2000).

### **Challenge 3: Online facilitators battle to design assignments that facilitate meaningful cooperation among learners during asynchronous discussions**

Online learning does not always involve independent work (University of Toronto, 2000) because interaction among learners is crucial in the online environment (Kearsley, 1998) to create a sense of community and belonging (Palloff & Pratt, 1999). However, instructors often only require ‘participation’ in the weekly discussion forum with the result that discussions often have no clear focus and never reach the point of meaningful, in-depth discussions (Graham *et al.* 2001). In order for students to participate, they must receive clear expectations from their instructors. This is often a mistake on the side of the instructor because the instructor fails to develop structure



and clear requirements (Clay, 1999). Saying 'every student must post to the bulletin board at least twice a week' is better than saying 'be sure to use the bulletin board for interaction' (Clay, 1999). Regardless of the technology used, faculty need to learn how to personalize their instruction and incorporate student involvement activities into the instruction (Dillon & Walsh, 1992; O'Quinn & Corry, 2002).

**Challenge 4: Online facilitators should at least take an online course as learners first and they need training before facilitating an online course**

Many case studies endorse the view that online facilitators need to experience online learning as a learner before they can effectively support other online learners (Cornelius & Higgison, 2000). Taking an online course as a learner is the most effective way to understand the online process, the chaos and confusion that accompany online learning (Dewar & Whittington, 2000).

Online facilitators need to acquire new skills (Dewar & Whittington, 2000). Acquiring these skills takes practice and time. The time to address these issues is not when the online course has started. Any online learning project must begin with a consideration of instructor roles and requirements early in the process and identify potential instructors, train them in the techniques of online instruction and ensure that they are comfortable in the role (Broadbent & Legassie, 2002:8). So often online facilitators are forced into teaching classes online without any support of their institution or having received training in the art of online facilitation (Cornelius & Higgison, 2000).

It is imperative to take time to learn the technology (Clay, 1999). Students are more suitable to use the technology effectively when instructors show the confidence to answer most of their questions and understand their problems. By practicing and mastering the technology, instructors are able to move beyond the basic features and optimise the effectiveness of their courses. Instructors will also save a lot of time in the long run by being able to quickly make adjustments to a course.

Whilst the principle of using the medium to teach about the medium is commendable, there clearly needs to be more individual support for instructors in coming to terms with not just the technical but also the pedagogical dimensions of their newer roles (Brennan, 2000).

Regrettably, Zorfass, Remz and Gold (1998:14) feel that not enough has been done to develop the skills of the online facilitator:

*So far, the literature on Online facilitation has examined what the Online facilitator does to promote thinking, conversations and learning. We have not located articles that have taken the critical step back to consider what it takes to help Online facilitators develop the skills they need to do their specialised work.*

### **Challenge 5: Online facilitators are solely responsible for the design and delivery of online classes**

It would appear that online facilitators are responsible for most of the development of the course and provide both subject and technical support to students (Higgison, 2000). It is for this reason that staff is reluctant to become online facilitators (Templeton, 2000). The time to create an online course is substantial (Kochtanek & Hein, 2000). Administrators do not recognise the effort that is required to develop online classes and fellow staff members feel that because online teaching is not face-to-face teaching in terms of contact hours, the online facilitators are getting a break (Western Nevada Community College, 2001).

The majority of instructors who develop online courses are using technologies that are entirely new to them and many of these instructors have limited information technology (IT) skills, which affects their ability to design and deliver such courses (Templeton, 2000; Kochtanek & Hein, 2000). Developing online course materials involves much more than simply putting the syllabus on the web, turning the lectures into PowerPoint slides to be viewed on the web, assigning homework and required readings and testing at the end of the semester (UNCW, 2000; Arsham, 2002; Barclay, 2001). Hands-on training with the technology of delivery is critical for the instructor (UNCW, 2000; Carnevale, 2000; Clark, 1998).

A mistake often made by instructors is using cutting-edge technologies when simple measures would suffice (Clay, 1999). Instructors are tempted to put PowerPoint slides on Internet courses when text would accomplish the same objective. The same goes for putting the textbook online (Clay, 1999). The purpose of an online course is not to replace the textbook. Instructors are doing the students a disservice by forcing them to read pages and pages of text from a computer screen.

Wolcott (1993) remarks that it is particularly challenging to focus on instructional activities because most faculty members are trained in content areas as opposed to curriculum and lesson planning. It is a 'foreign practice' (Wolcott, 1993) for faculty members to plan interactive strategies in advance of course delivery because faculty

members are accustomed to rely on verbal cues and the spontaneity of the classroom discussion to serve as a catalyst for interaction (O'Quinn & Corry, 2002; Wolcott, 1993; Lick, 2001; Levy, 2003).

### **Challenge 6: Learners need support apart from the course work support provided by the online facilitator**

An important role to be played by those involved in online learning is that of supporting learners. Learners stumble upon a number of challenges in the online learning environment, including administrative and technical difficulties and course work issues (Templeton, 2000). Instructors often feel responsible to assist the learners in overcoming these problems. However, the challenge for the institution is how to provide the learners with administrative and technical support without the instructors feeling they have to take on all these roles and affect the level of learning support they can provide (Templeton, 2000; UNCW, 2000).

According to Morrison (1999) there has never been a period during which more forces have had an impact on higher education at one time – faculty are moving forward, technology is improving and student demand is increasing, but few changes are taking place in the university structures to accommodate the special needs of distance-learning students (Bothel, 2001). Faculty ought to change the admission process; registration, technology support and other student services must be advanced to support the student who is not physically present on campus (Bothel, 2001).

### **Challenge 7: Online assessment is a huge issue for online facilitators**

Online assessment is a huge issue for instructors. Participation in online activities in some cases is an assessable task (Hinnett & Thomas, 1999). While some facilitators like to use self checking devices, an online quiz, multiple choice questionnaires or written assignment and problem based exercises sent by e-mail, there are many who believe that the assessment process should be as rich as the learning process and should be a transparent process for the learner (Brennan, 2000). How does the online facilitator ensure that the person submitting the assessment task is indeed the 'actual' learner? There is scant research available to assist with these issues.

**Challenge 8: Online facilitators are slack in providing feedback to learners**

Online communication requires that instructors and learners learn new communication and information management skills (Bradey, 2003). An active learner online requires an active instructor online (Bradey, 2003). It is essential that instructors provide timely and appropriate feedback to their learners about their work (Chickering & Ehrmann, 1996; Bradey, 2003). Instructors need to provide two types of feedback, namely information feedback and acknowledgment feedback (Graham *et al.* 2001). Information feedback provides information or evaluation, such as an answer to a question or an assignment grade and comments (Graham *et al.* 2001). Acknowledgment feedback confirms that some event has occurred such as the instructor acknowledges that s/he has received a question or assignment and will respond shortly (Graham *et al.* 2001).

Research (Graham *et al.* 2001; Collis, Winnips & Moonen, 2000) indicated that instructors gave prompt information feedback at the beginning of a course, but as the course progressed and instructors became busier, the frequency of responses decreased and the response time increased. In some cases learners only received feedback on postings after the discussions had already changed to another topic. Likewise, instructors rarely provided acknowledgement feedback. Instructors only provided acknowledgement feedback when they were behind with marking and wanted to inform the learners that their assignments would be graded soon (Graham *et al.* 2001; Collis *et al.* 2000). Students feel more connected with instructors who participate regularly (Clay, 1999).

**Challenge 9: Online facilitators need to respond effectively to online conflicts**

The interaction with a network is via a computer and it is easy to forget that there are people at the other end of the line. People interacting on computers are isolated from social cues and non-verbal communication, with the result that messages are often blunt and discussions can be rude and insulting (White, 2000; Shea, 1994; Palloff & Pratt, 1999; Harasim, Hiltz, Teles & Turoff, 1996).

During online courses, online facilitators encounter difficult learners who dominate a class discussion, challenge course content, resent the expertise of the instructor, display rude and inappropriate tone to peers, refuse to adhere to the class structure and assignment schedule, or simply do not participate (White & Weight, 2000).

The online facilitator needs to 'watch' inter-group conflict situations and prompt mediation has to take place when the following problems occur: attacking, flaming,

dominating, disrupting, sarcasm, drifting off track and withdrawing (University of Toronto, 2000).

Various challenges and demands have been discussed above. For the purpose of this study, it is vital to determine what challenges this particular online facilitator had to deal with. Are the challenges similar to those already mentioned or are there new and additional challenges that the online facilitator had to cope with? Therefore, it is fitting to ask the question:

### **What challenges did the online facilitator face?**

The Webster's College Dictionary (1991:225) defines 'challenge' as

*difficulty in a job that is stimulating to one engaged in it.*

The Webster's College Dictionary (1991:359) defines 'demand' as

*an urgent or pressing requirement.*

On analysing the abovementioned challenges and demands, it can be deduced that there are difficulties attached to the role of the online facilitator, which could cause conflict within the online facilitator *per se*.

Challenge 1: Online facilitators are inundated with e-mail messages and bulletin board postings. The online facilitators are overwhelmed with messages and they do not know how to stem the flow of messages, which can cause inner conflict.

Challenge 2: Online facilitators have extended working hours. In this scenario there will be conflict situations because family life suffers.

Challenge 3: Online facilitators battle to design assignments that facilitate meaningful co-operation among learners during asynchronous discussions. The word 'battle' clearly indicates a conflict or struggle because online facilitators are not sure what to do.

Challenge 4: Online facilitators should at least take an online course as learners first and they need training before facilitating an online course. Indirectly, there is confusion within the online facilitator because this person feels inadequate to present the online class.

Challenge 5: Online facilitators are solely responsible for the design and delivery of online classes. In this section it was clearly indicated that online facilitators do not necessarily have the IT skills to design online courses, therefore a team is appointed to help with the design of the online courses.

Challenge 6: Learners need support apart from the course work support provided by the online facilitator. There is inner conflict because the online facilitators feel that they are wasting valuable facilitation time helping learners with administrative and technical queries.

Challenge 7: Online assessment is a huge issue for online facilitators. Once again, there is the inner battle and struggle with online assessment.

Challenge 8: Online facilitators are slack in providing feedback to learners. The conflict arises here because there is just too much work to do and the online facilitators cannot cope with the workload.

Challenge 9: Online facilitators need to respond effectively to online conflicts. This is a tricky situation and deals with conflict *per se*.

It is for this reason that the researcher selected the 'four elements of online conflict' model (White & Weight, 2000:151) as the conceptual framework for the challenges that the online facilitator faces.

### 2.6.2. Conceptual framework for online challenges

The 'four elements of online conflict' model is graphically illustrated in Figure 2.6.

**Figure 2.6:** The four elements of online conflict

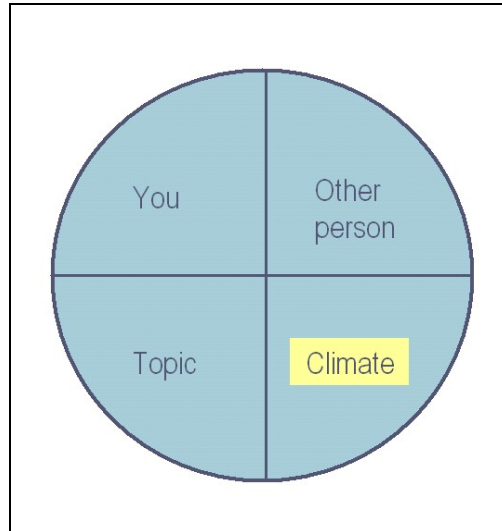


Figure 2.6 illustrates a circle where each one of the conflict elements makes up one quarter of the circle. Three of the four elements are self-explanatory. The 'you' of a conflict is anyone who deals with the second element, 'other person'. The 'topic' is the subject you and others are talking about. The climate of a conflict is the physical environment and objects, such as the computer, the temperature in the room, but also the emotional state of the person or sensitive topic.

Table 2.26 provides a breakdown of the abovementioned challenges in accordance with the 'four elements of the online conflict' model.

**Table 2.26:** Breakdown of online facilitator challenges

<b>Challenge</b>	<b>You</b>	<b>Other person</b>	<b>Topic</b>	<b>Climate</b>
Too many e-mails	Online facilitator	Learners	Too many private and course e-mails	Frustration and workload
Extended working hours	Online facilitator	Learners	Long hours – login to system at night and also over weekends	Balance between work and family life
Battle with design of co-operative asynchronous discussions	Online facilitator	Faculty or institution	Incorrect design	Learners do not participate and online community dysfunctional
Be a 'learner' and receive training	Online facilitator	Faculty or institution	Attend a course and receive training	Incompetence and time limitations
Design and develop course solo	Online facilitator	Faculty or institution	Course development	Incompetence, frustration and time limitations
Additional learner support	Online facilitator	Faculty or institution	Administrative and technical support	Frustration, additional workload and infrastructure
Online assessment	Online facilitator	Faculty or institution and learners	Online assessment	Incompetence and infrastructure
Slack with feedback	Online facilitator	Learners	No or late feedback on assignments	Frustration, pressure and workload
Effective response to conflict	Online facilitator	Learners	Online conflict	Dysfunctional group

Cognisance needs to be taken of the various challenges that the online facilitator needs to face. It is imperative that solutions be found for these challenges otherwise potential newcomers might never take up the challenge to conduct online classes.



## 2.7. Theme 5: Competencies

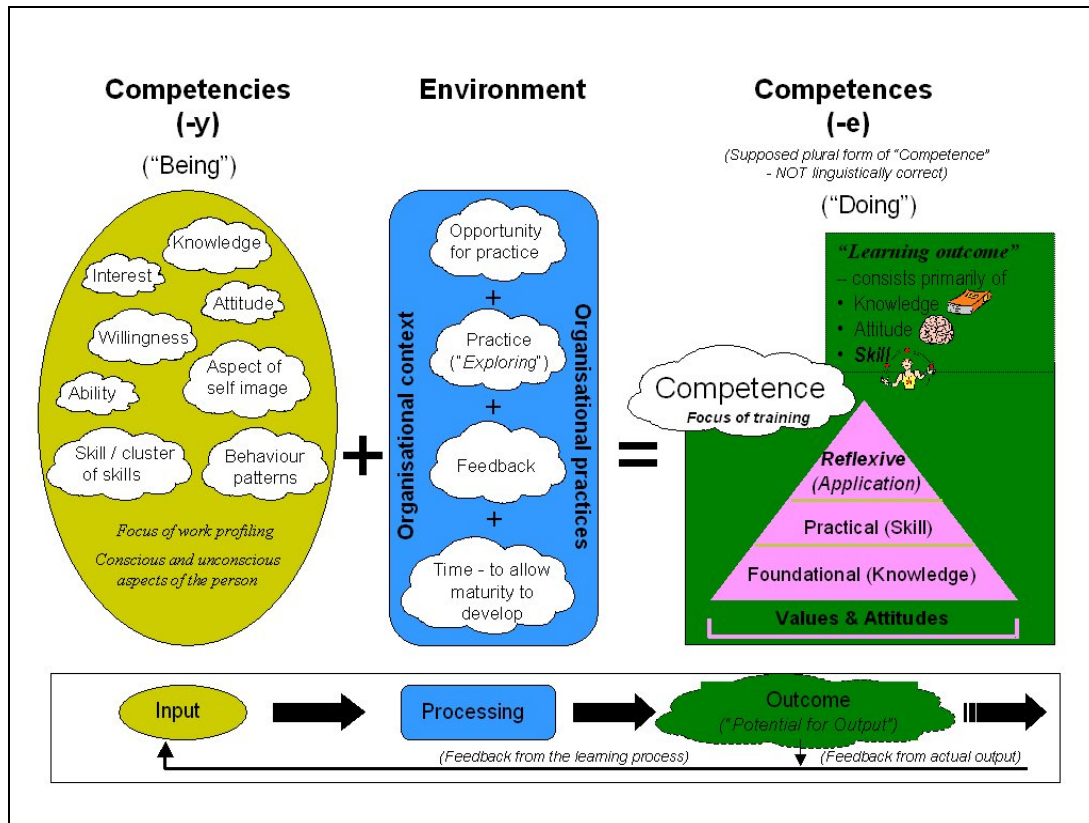
### 2.7.1. Literature review

Over the last ten years, particularly within the service industries utilising call and contact centres it has been reported that recruiting staff on the basis of their competencies has become normal practice (Shellabear, 2002).

*If you get the right person it's easy to give them the skills* (Shellabear, 2002; SHL, 1998).

Competency models have developed as a way to discuss worker characteristics in a manner that is in language of business people as opposed to psychologists (SHL, 1998:33). As such these competency models tend not to be as detailed as attribute models and they generally include specific job/industry knowledge or skill requirements not included in attribute models. The use of competency models make activities such as succession planning, individual training and development plans and performance management programmes easier to design and implement (SHL, 1998; Boyatzis, 1992).

Competency profiling is a method for identifying specified skills, knowledge, attitudes and behaviour necessary to fulfil certain tasks within a role (Krüger, 2002; Boyatzis, 1982; Shellabear, 2002). In categorising competence, some organisations and industries make distinctions between **competencies** (my emphasis), which refer to desired personal attributes and behaviours and **competences** (my emphasis), which are the knowledge and skill required to bring about improved performance (Shellabear, 2002; Krüger, 2002). Figure 2.7 provides a graphical representation of competencies and competences. Competencies (Krüger, 2002) refer to the inherent (or pre-existing) *clusters* of knowledge, skills and human attributes important for effective functioning in a role. 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, aspect of one's self image or social role, or body of knowledge that s/he uses. Competences, on the other hand, refer to replicable and repeated application of a skill (or a cluster of skills) in the domains of knowledge, psychomotor skills and attitudes within a defined context, and to a specified standard. A technical or practical skill or skills cluster, such as typing skill and numerical skill can be included here (Boyatzis, Cowen & Kolb, 1994).

**Figure 2.7:** Competencies versus competences  
(Adapted from Krüger, 2002)

For most organisations and institutions, it is necessary to ensure that its business outcomes are achieved. If standards and the means to achievement are ill defined, an organisation or institution is unable to deliver products and services to customers that meet quality, deadlines and price. For existing staff, knowing specifically what skills, knowledge, attitudes and behaviour their employers seek enables the staff to assess their own strengths and recognise development areas.

For a competency framework to be effective it needs to be used by line managers and staff within a performance management system (Boyatzis, Cowen & Kolb, 1994). Performance management is the continuous process of developing both competencies and competences to improve individual, group and organisational performance. Competency profiling is a valuable tool for both an individual and the organisation. It has the potential to facilitate training, development and learning and making a measurable increase to performance (Shellabear, 2002; SHL, 1998).

For the purposes of this study it is important to pinpoint the competencies that an online facilitator needs in the online environment. To date, several task listings have been provided for online facilitators (Full Circle Associates, 2002b; Schuman, 2000), which

still do not answer the question of online facilitator competencies. Sanders (2001) has grouped eLearning competencies into generic categories, namely general competencies, management competencies, distribution method competencies and presentation method competencies. For the presentation method competencies, the following are mentioned (Sanders, 2001:7): Cost analysis and return on investment (ROI) of the presentation methods which include understanding the relative cost of each presentation method or combination of methods and assuring that the organisation is receiving a good value for the money spent. Skills and knowledge that make up the competency include *inter alia* analysis skills, ability to compare features of various products and evaluate them against organisational needs and knowledge of which distribution methods can deliver which presentation formats. This information does not assist the online facilitator in any way and still remains at an impractical level. Considering the analytical component, what skills does the online facilitator need to operate at this level – is it judgement, problem analysis or objective setting? (SHL, 1998).

A facilitator, as defined by Zhaba (1998:1) is not necessarily an expert on a specific topic, but an expert in the process of communication, working with people, group dynamics, workshop design and implementation and dealing with crises. Literally translated from Latin, a facilitator's domain is 'to make things work' (Zhaba, 1998:1). Attributes for a facilitator include interpersonal skills, effective communication skills, teaching and facilitation ability, attitudes and knowledge (Zhaba, 1998). On reviewing these competencies, it is once again noted that these attributes are too vague. The facilitator, in this instance, seems to be restricted to a workshop scenario and no reference is made to the online environment. Effective communication skills are mentioned, but it does not specifically state that written communication skills are important.

Broadbent and Legassie (2002) come the closest to indicating competencies for the online facilitator. Online facilitators need to have a number of competencies to be an effective part of an eLearning programme and these competencies are *inter alia* (Broadbent & Legassie, 2002:5):

- A willingness to step back from the limelight and facilitate learning.
- An openness to learn new approaches to learning.
- Ability to monitor personal progress and take action to improve skills.

- Appreciation of the benefits of eLearning.
- Creativity to design and adapt eLearning for various purposes, groups and topics.
- The ability to write clear e-mail messages.
- The ability to anticipate learner reaction to situations.
- The ability to learn online facilitation skills.
- Time management skills.
- The ability to provide support and counselling via e-mail messages.

Except for the ability to write clear e-mail messages and to provide support and counselling via e-mail messages, the abovementioned competencies are also vague. Broadbent & Legassie (2002:5-6) mention that if no person can be found with the exact skills listed above, one option is to identify in-house people who possess three higher-level competencies that indicate they can further develop the specific skills. The higher-level skills and attitudes are empathy, flexibility and eagerness to become an online instructor.

Higgison (2000) states that institutions need to support the development of the technical, teaching and contextual knowledge and skills needed for online delivery. It is important to identify the main roles and activities involved in supporting online activities. This can only be achieved when skills, abilities and behaviour patterns associated with each role have been identified (Higgison, 2000). When the suitable person is appointed as an online facilitator, the development process starts, which include the drawing up of a training and development plan, including objectives, timetables and resources, setting up a monitoring and evaluation process and ensuring the institutional culture, procedures and process support and value the online innovation (Higgison, 2000).

Before any recruiting process or development process can start, it is important to ask the question:

### **What people competencies, thinking competencies and energy competencies were identified for the online environment?**

Palloff and Pratt (1999) suggest that faculty teaching online must play both intellectual and social roles. It is for this reason that the *Work Profiling System (WPS)* tool from Saville and Holdsworth Ltd (SHL) was selected as the conceptual framework, as it has a specific intellectual component, indicated as thinking competencies as well as a social component, indicated as people competencies. Energy competencies 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.

#### **2.7.2. Conceptual framework for competencies**

The *Work Profiling System* is used in over 40 countries and in 20 languages. The *Work Profiling System* tool covers all the key tasks performed in a job. It provides a thorough and systematic basis for analysis and forms a vital check to ensure that no important areas of a role are overlooked (SHL, 1998). The data collection process is fast and reliable. It provides an objective framework to handle complex and sensitive issues such as organisational change and job evaluation.

Features and benefits of the *WPS* (SHL, 1998:42) are *inter alia*:

- The *WPS* uses standard terminology for increased objectivity. The *WPS* questionnaires and reports describe work characteristics, such as work behaviour or human abilities. This makes comparing different jobs to one another much easier.
- The information database of the *WPS* provides reports on the tasks and behaviours that comprise a role (including work context and environment) and the characteristics and competencies employees need in order to be effective.
- Compared to other methods, the *WPS* is considerably less time consuming. The analysis can be completed in less than a day.

- Research has shown that the process is role sensitive and effective discrimination between different roles can be achieved.
- The *WPS* has successfully been defended in major labour court cases.

Figure 2.8 provides a graphical breakdown of the various competencies.

**Figure 2.8:** *Work Profiling System* competencies

People Competencies	Leadership
	Interpersonal
Thinking Competencies	Analytical
	Business awareness
Energy Competencies	Dynamism
	Operational

Each set of competencies has indicators attached to them to pinpoint what is expected of a particular person designated for a certain role (SHL, 1998).

The indicators for Leadership (SHL, 1998) are *inter alia*: providing direction, empowering, motivating others, developing others and attracting and developing talent.

The indicators for Interpersonal (SHL, 1998) are *inter alia*: interpersonal sensitivity, teamwork, building and maintaining relationships, flexibility, stress tolerance, tenacity and integrity. Cross-cultural awareness is another indicator. At present, this indicator has few *WPS* items that load onto it and does not register moderate, high or extreme. Therefore, this particular indicator is always at baseline level.

The indicators for Analytical (SHL, 1998) are *inter alia*: judgment, information gathering, problem analysis, objective setting, management control, written communication skills and technical skills and competence.

The indicators for Business awareness (SHL, 1998) are *inter alia*: organisational awareness, strategic perspective, commercial orientation, cross-functional awareness, innovation and career and self-development.

The indicators for Dynamism (SHL, 1998) are *inter alia*: self-confidence, impact, decisiveness, drive, initiative, persuasiveness and oral communication skills.

The indicators for Operational (SHL, 1998) are *inter alia*: concern for excellence, customer service orientation and execution.

## 2.8. Conclusion

According to the literature, cognisance should be taken of the different 'look' of the online environment as opposed to the classroom environment. An online facilitator should realise that s/he does not have as many control points (Tobin, 2001) in cyberspace. Online learning is learner-centred (Kearsley, 1998) and the learners are the active performers of tasks and assignments (Makin, 2002). The online environment is more challenging than the classroom setting (Moreira, 2002) and it is actually more demanding to teach online than face-to-face (Harasim, 1993; Berge, 1995). These facts will be corroborated in Chapter 4 after studying the online facilitator who performed the *CyberSurviver* case study.

The online facilitator is the person that has to make the biggest adjustment to the online environment. This person has to move from the centre stage position in the classroom setting to that of a 'guide on the side' (Collison *et al.* 2002) or even to a less glamorous position of 'host on the post' (Ambrose, 2001). The online facilitator has to facilitate the learning process and provide support through asynchronous text messages. The online facilitator must also compensate for the lack of physical presence by creating a supportive environment where learners feel comfortable to participate (Hobgood, 2003; Palloff & Pratt, 1999). Chapter 4 will reveal how the online facilitator under scrutiny managed to adjust to the online environment and it will also indicate which personal adjustments she had to make.

According to Bischoff (2000), effective online teaching consists of instructor visibility and frequent and timely feedback. Twenty-three online facilitation roles have been identified from the literature, indicating the variety of activities that the online facilitator has to perform. Not one of these roles indicates visibility *per se*. The problem is that 23 roles are too many to use and not manageable for an online facilitator, thus creating more frustration and anxiety for future online facilitators. These 23 roles have also not indicated which are important in terms of an intellectual focus and people focus towards learners. How must these newcomers cope with the technology and perform 23 roles without appearing less than proficient? (Murray, 2001). To make matters worse, various challenges were highlighted which the online facilitator needs to be aware of



and manage in the online environment. It is for this reason that the *Work Profiling System* tool (SHL, 1998) was selected to identify people competencies, thinking competencies and energy competencies for the online facilitator. It is important to identify the visible roles and applicable competencies to appoint the suitable person for this role and to contract development plans to support this online innovation because ...

*The role of the **online facilitator** is emerging as an important role in the success of online group work spaces* (Rykert, 2002:1 – my emphasis)

and

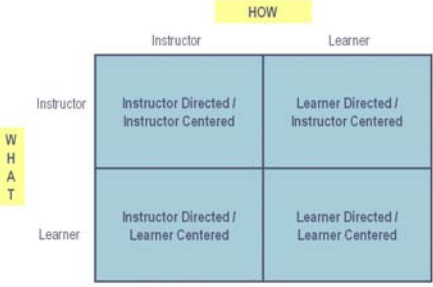

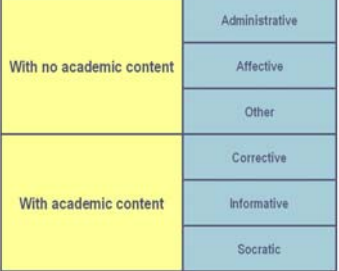
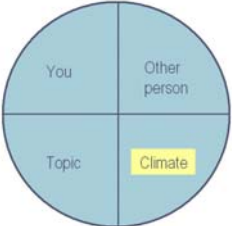

***Instructors** ... play a crucial role in maintaining the viability of their online courses ...* (Mazoué, 1999:108 – my emphasis).

A synopsis of each subsidiary question within its conceptual framework is depicted in Table 2.27 to provide an overview of all the concepts that influence this study.

Chapter 3 provides the research strategy and research design to address the research problem.



**Table 2.27:** Each subsidiary question within its conceptual framework

 <p>Models of Teaching (Williams <i>et al.</i> 1999:107)</p>	<p>How did the facilitator adjust to the online environment?</p> <p>The learner-centred environment has an impact on the online facilitator because the facilitator has to move from being the 'sage on stage' to a 'guide on the side'.</p>
 <p>Interpersonal-Impersonal Continuum (White &amp; Weight, 2000:4)</p>	<p>How did the online facilitator 'talk' to the learners and encourage dialogue with the learners?</p> <p>By definition, the online facilitator needs to be caring and help and assist the learners.</p>
 <p>Taxonomy of instructor postings (Blignaut &amp; Trollip, 2003:157)</p>	<p>What roles did the online facilitator play to be 'visible' in the online environment?</p> <p>Although the online facilitator is working on the side, s/he still needs to be visible for the learners in a social and intellectual manner.</p>
 <p>Four elements of online conflict (White &amp; Weight, 2000:151)</p>	<p>What challenges did the online facilitator face?</p> <p>Being online brings along new challenges that can be clustered into four quadrants and the 'climate' needs to be understood to avoid possible conflict situations.</p>
 <p>Work Profiling System competencies (SHL, 1998:60)</p>	<p>What people competencies, thinking competencies and energy competencies were identified for the online environment?</p> <p>Because teaching online needs a social and intellectual component, the <i>Work Profiling System</i> will be used to pinpoint competencies.</p>