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Leading the Band: The Role of the Instructor in Online Learning for Educators

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Abstract

Drawing from the online experiences of teachers across the United States who participated in online professional development courses, this article focuses on what educators/participants consider to be the roles and responsibilities of the online instructor. They see the online instructor as facilitator, model, planner, coach, and communicator. They describe how these roles are uniquely tuned in the online environment.

With the proliferation of distance learning through online courses, many educators find themselves considering the role of online instructors. As such, they may realize that online instruction is similar yet different from face-to-face learning, requiring new or different skills and strategies for effective online direction. This study, based on online adult learners' experiences and expectations, provides empirical elaboration on what some of these approaches are.

Online instruction is often recognized as particularly suitable for practical, multitasking adult learners because it offers anywhere, anytime instruction. Exploration of the role of the online instructor is appropriately grounded in the literature of adult learning and distance education through online learning. This perspective guides our investigation of how the online environment of instruction and delivery develops the role of the instructor and a different "rhythm" or way of teaching and learning than face-to-face environments have traditionally promoted.

Andragogical principles assume that adults tend to be self-directed, practical, and social, and that they bring varied experiences to their learning. Grow (1996) points out that adult learners may be at different levels of self-direction in different situations. They require different kinds of intervention from their teachers at these different stages. Bandura (1986) describes the importance of social learning and the validity of learning by observation. These principles suggest that learning environments should build on prior experience, promote active participation, use collaborative learning, and provide transferable, real applications (Lawler & King, 2000). They also underscore the need for the instructor to adopt flexible roles in response to the needs of adult learners.

Discussion of the instructor's role in adult learning is guided by a constructivist perspective where adult learners create their own knowledge and which is learner- rather than instructor-centered (Palloff & Pratt, 2001). The "sage on the stage" is replaced with the "guide on the side" approach wherein the teacher, while an expert, facilitates dialogue so that students learn from each other as much as from her (Collison, Elbaum, Haavnd, &

Tinker, 2000, pp. 208, 211). Many practitioners have noted this shift in emphasis from presentation of content to facilitation of learners and learning (Collis, deBoer, & VanderVeen, 2001). According to Johnson (2001), constructivism has five dimensions: (a) open-ended, complex questions; (b) real-world context; (c) shared goals; (d) cognitive organizing tools; and (e) instructor as facilitator or coach.

Similarly, the role of the instructor proceeds from a humanist perspective. Cognitive growth, knowledge acquisition, and skill mastery are not only possible, but also are preferable and can be ultimately empowering and transformative (Cranton, 1996; King, 2002; Merriam & Caffarella, 1999).

While online instruction shares many features with face-to-face classes, it also presents unique ones. The growing literature from online learning differentiates the instructor's role online from that in face-to face-instruction. This role is seen as "new and more complex" (Schofield, Melville, Bennet, & Walsh, 2001, p. 1). It has moved from "didactic, teacher-centered learning towards constructivist, learner-directed learning" (Adult Education Resource and Information Service [ARIS], 2001, p. 1). Collins and Berge (as cited in Palloff & Pratt, 1999) provide a most useful framework dividing the online instructor's role into four categories: pedagogical, social, managerial, and technical. They describe

> the pedagogical function as one that revolves around educational facilitation. The social function . . . is the promotion of the friendly social environment essential to online learning. The managerial function involves norms in agenda setting, pacing, objective setting, rule making and decision making. The technical function depends on the instructor first becoming comfortable and proficient with the technology being used and then being able to transfer that level of comfort to the learners. (p. 73)

ARIS (2001) similarly identifies four areas, dialogue, involvement, support, and control, where the role of the teacher is being redefined and the dynamics of the learning environment are being reframed. The online instructor's tasks translate to "setting the scene, monitoring participation, facilitating critical thinking, and encouraging student collaboration" (Youngblood, Trede, & di Corpo, 2001, p. 266). It is the instructor's duty to open discussion online of "goals, criteria of meeting goals, evaluations of whether goals have been met, plus peer evaluation and self-evaluation" (Johnson, 2001, p. 49). The instructor's mastery should extend to identifying self-motivating factors and enabling self-direction of participants (Powers & Guan, 2000).

Many authors offer metaphors to encompass the role of the instructor online. Cantor (2001) labels the instructor a "helper, guide, change agent, coordinator, and facilitator" (p. 310). Rogers (2000) refers to a moderator or a mentor. Goodyear, Salmon and Spector (2001) and others expand this list to describe the online instructor as process facilitator, advisor-counselor, assessor, researcher, content facilitator, technologist, and designer. Finally Salmon (2000) renames instructors, "e-moderators," and describes them as "weavers," who pull together the participants' contributions, by, for example,

> collecting up statements and relating them to concepts and theories from the course. They enable development of ideas through discussion and collaboration.

> They summarize from time to time, span wide-ranging views and provide new topics when discussions go off track. They stimulate fresh strands of thought, introduce new themes, and suggest alternative approaches. (pp. 32-33)

Salmon reiterates the theme that the e-moderator's role is to help students create meaning rather than to impart content. Our research would propose another analogy, that of the online instructor as conductor or leader of a band of learners who knows how, when, and to what degree to bring out the music, the strengths, and depths of various sections.

Purpose of Study

The purpose of this study was to examine perceptions of participants in an online course for educators concerning the role of the online instructor. This description would be derived from their experience and would include their expectations and their recommendations. The research questions addressed with this study include, What expectations do online learners have of the online instructor? How do they perceive the role of the online instructor in action? And what recommendations do they offer for online instructors?

Research Design

Context of Study

The Anytime Anywhere Learning Professional Development School (AALPDS) is an extensive online course delivery system of instructor-guided six-week courses. Each course is developed, implemented, evaluated, and revised in a continuous cycle of improvement. This online professional development school, funded by a United States Department of Education Fund for the Improvement of Postsecondary Education (FIPSE) Learning Anytime Anywhere Partnership (LAAP) grant in 2000, has among its goals, the development of online courses, in several content areas, that provide opportunities for teacher development in teaching and learning. With the proliferation of online initiatives, this project is distinctive in including a focus on the needs of teachers as adult learners, the development of local and distant learning communities, and unique content in the areas of standards-based teaching, online learning, and adult learning.

Within this online program, courses are written for a student population of teachers, administrators, and others interested in standards and online learning, and classroom strategies. The online courses consist of interactive, dialogue-based, asynchronous formats that present in-depth material, focus on immediate application, and facilitate critical reflection and collaboration through Web-based discussions and group projects.

The hybrid classes were embedded in educational technology courses in which graduate education students were enrolled. These courses alternated between online sessions and face-to-face sessions across 15-week semesters and 6-week course modules. These courses included specific discussions about leading online courses and participants' insights into the experience as educators and learners. The project went live in March, 2001, with its first online class. During the three and a half years of the project,

23 six-week course modules were created. As the project has developed over this time, formative evaluation has played a high profile role in guiding it to respond to the changing technological, motivational, and contemporary needs of the learners. This experience casts a perspective of learning through practice across the project that contributes to our understanding that the role of the instructor in online learning is also continually developing in new ways as learners' needs, skills, sophistication, and expectations are shifting in our world day by day. For these reasons, this study's focus on the adult learner is particularly significant in providing a guiding light for the initiative and to inform student-centered online learning. The fact that these participants are professional educators provides a distinctive insight into these teaching and learning dynamics and roles that would not always be afforded in all online classes. In addition this perspective is a limitation in that the role is perceived through the eyes of educators and not necessarily representative of all online learners.

Setting and Participants

All participants were enrolled in the AALPDS online courses. Contact with the largest group of participants was primarily through the Web-based online survey because courses are available to any educators who are in participating districts or who are members of the larger online learning environment of the corporate partner (80,000 Web visitors annually). Several sections of the courses were delivered in a hybrid (partly face-to-face and partly online) format in the New York City location, making up a total of 24 of the participants.

Among the 324 survey participants, 287 were female and 35 male. Regarding ethnic background, 279 were self-identified as White, 13 as African American, 8 as Hispanic, and 5 multiethnic. Teaching experience of the participants ranged from 0 to 16 years and more: 100 had 16 or more years, 149 had 6 to 15 years, 65 had 1 to 5 years; and 2 had no teaching experience. For 102 (31.5%) respondents, this was their first online course. Omissions by participants in checking these descriptors account for the discrepancies in total number of participants in these categories.

Based on responses to descriptors in the survey, participants identified themselves as follows: 158 (48.8%) early adopters ("first to try something new"), 152 (46.9%) "like to try technology after its been tried by others," 7 (2.1%) resist using technology, and 7 no response. Two hundred seven (63.9%) describe themselves as advanced technology users, 85 (26.2%) as intermediate, and 25 (7.7%) as beginners. Furthermore, 32 (9.9%) were enrolled in a degree program and 11 (3.4%) indicated that the course was part of the requirements for that program.

Characteristics of the majority of survey respondents included being female (88.6%) and nonminority (86.1%), and living in suburban communities 168 (52%). Additionally, 65 (20.1%) had over 21 years of professional educational experience, and nearly two thirds, 201 (62%), held a master's degree. In contrast, less than a fourth of the respondents, 77 (23.8%), lived in rural areas, and 21.9% (71) lived in an urban location. Studies indicate that there is a large economic and racial gap between users and nonusers of the Internet, and our respondent demographics appear to confirm this gap for our online learners (Burdenski, 2001).

The hybrid course students were a subset of the survey participants. They were enrolled in graduate education courses as matriculated or nonmatriculated students in a private university.

Data Collection and Procedure

The more quantitative aspect of the study consisted of the online survey. This survey was voluntarily completed by learners within the 4th to 6th weeks of their online course. Course facilitators informed learners when and how to access the survey. Respondent identity was kept confidential through passwords. The survey used a variety of question formats including multiple choice, Likert items, and free responses that covered nine topics: demographics (7), satisfaction (4), motivation (23), course and course impact (45), online learning (23), technology experience (2), access (12), barriers (5), and contacts (7). This paper focuses on the data collected from items concerning satisfaction and online learning

The external evaluation team created the survey through a review and revision process that included input from program directors and course content specialists. The first focus group received pilot survey questions in person and by e-mail. In October 2001, the survey went live online for learner responses. From among those participants who completed the courses, a response rate of 33% (n = 324) was achieved.

Qualitative data were collected using several methods. Participants in online courses completed open-ended items on the online survey at the end of their courses. In addition, students, enrolled in two hybrid courses, responded to an online discussion thread on the topic of the role of the instructor. Data were derived from participants who are educators and professionals as well as online students.

This mixed design (Creswell, 2003) allows researchers to include a broad base of participants, as in the online survey and also to explore a greater depth of experience through qualitative methods such as theme analysis of the online discussions. Findings that are particularly relevant to informing our understanding of the role of the instructor in online learning are presented here.

Data Analysis

As commonly used in mixed-design research, the multiple sources of data provide support for the validity of the data (Creswell, 2003). Survey items consisted of attitude scales and open-ended free-response answers. The discussion boards served to validate the survey responses as these participants had participated in both modes and the responses could be compared to one another. Construct validity of the survey instrument was a priority for the survey designers. Each section of the instrument had multiple items relating to the construct being used to insure fit with the purposes of the survey and the population being surveyed. Items covered both negative and positive responses; for example the items about assistance in accessing the computer were balanced by items about barriers to access. Both of these items also had write-in responses. The internal consistent reliability of the rating scales was tested using coefficient alpha showing a reliability of .8581. The online survey system also prevented redundancy of respondents because individual, unique, single-use passwords had to be developed for each participant

each time they took a course, thereby preventing any individual learner "stacking" the responses with multiple entries. Responses from the online survey were tabulated and coded for frequencies, percentages, and correlations.

Discussion board transcripts and free responses from the survey were coded using the constant comparison method. Themes were determined from the data and the data, in turn, were grouped and articulated within those themes (Creswell, 2003).

Findings

Based on their experience and expectations as online learners, educators/participants perceived the role of online instructors as multidimensional. They described the instructor's role as active and evolving during an online course. They expected the instructor to act as a planner, a role model, a coach, a facilitator and, above all, a communicator. These roles are interconnected and overlapping, with different emphases at different times and in varying degrees throughout the life of the course.

Planner

The planner role speaks to organizational and technical skills of the instructor online. As one participant says, "having clear directions as to what is expected from the instructor can make the difference between a positive learning experience and a stress-filled nightmare."

While organizing the course and making expectations clear at the beginning of the course are crucial, timely help throughout the duration of the course are equally important to the online learner. It is important too to "constantly reiterate the purpose of the group."

Helping students through technical glitches is part of the planner's role. Almost three quarters of our learners, 237 (73.2%), reported in the survey that they had had three or more years experience with computers and almost half of the respondents, 149 (46.0), had six or more years experience. Less than 10%, 25 (7.7%), said they were "beginners." The instructor must respond and accommodate these various levels of experience and comfort with the technology. Access to computers and namely having a home computer was a commonality of most respondents: 96.3% of participants had computers at home.

Model

While participants stressed the importance of shared learning and equal footing of student and instructor online, they alternately called for the instructor to be a leader in modeling online behavior. Several called for the instructor to "model reflection," and "model being on top of things and organized." Another summed up the online instructor's role as an "inspiring leader, [providing] day to day leadership, clear directions, and organizational structure." A key aspect of modeling is timeliness. One noted that "if the leader sets the example of responding to postings and being timely with other correspondences, it will motivate the students to do so."

Coach

This third category of descriptors calls for the instructor to be a coach, encouraging individuals and creating a team of learners. This role recognized the affective repercussions of computer-mediated communication. As a coach, the instructor should, according to one student, "challenge people who are bound by a common purpose to think differently, try out new methodologies and initiatives." She is to "motivate students to take initiative and responsibility for their learning," said another. While the instructor encourages critical thinking and fresh perspectives, she provides moral support to her students. The instructor must "foster an environment that keeps discussion going and weaves discussion threads," at the same time she "provides support and catch up time to those who are struggling, which includes checking on quiet students." She must be aware of differences, and "bring out diversity, not only of community, but of individuals."

Facilitator

As facilitator, the instructor is both guide and learner. "Instructors must be trained in this new mode, to facilitate student success and develop online participation, as they themselves develop in the art of becoming an online guide." One participant noted that it is important that "we are all learning from each other, not just the teacher." As an equal partner in learning, the instructor who "becomes a learner and experiences the joys and difficulties of learning online . . . will be in a better position to help potential students in designing appropriate learning programs."

The instructor must also operate democratically, and "give everyone an opportunity to express opinion, respect opinion and ideas, identify need . . . and keep lines of communication open." Another respondent advised, "Don't dominate, keep it simple. Ask leading, open-ended questions that beg thoughtful responses and foster interaction."

The instructor needs to be collaborative because "so much learning is done by sharing good and bad stories." "Sharing is what teaching is all about," concludes one participant. "There is no better way to make students a part of the learning experience than to share in their interests."

Many respondents acknowledged the process or evolving nature of online instruction over time. "It takes a lot of time for the teacher to create a climate of cooperation and understanding." As one said, online teaching has a different twist to it. "It is student centered. The instructor is involved as a guide, steering the evolving group in a suitable direction."

Communicator

A crucial role of the instructor, reiterated by many and woven through most of the participants' responses, is as communicator. "A key is an instructor who communicates before the class begins, who fosters communication and collaboration among classmates, who responds timely [*sic*] and with critical feedback." The amount, timing, content, and format of communication between instructor and students is of critical importance in the

online course deprived of face-to-face sensory clues. From the survey, we learned that many learners are spending over two hours every time they logged in. The majority of respondents allocated the distribution of time according to these categories: 20 minutes reviewing assignments, 10 minutes downloading information, 30 minutes searching the Internet for topics, 30 minutes reading the forum, 15 minutes posting on the forum, 30 minutes working on course project and reading e-mail, and 5 reading the water cooler. Almost half of the survey respondents said they logged in "once every few days," while 32.4% said they logged in every day. This sizable commitment of time implies the need for flexible and frequent skillful communication from the instructor. The instructor, as one respondent summed up, "must remember the three p's, preparation, patience, and practicality. They must be ready for anything . . . to listen and respond to individual student needs . . . to create an environment of comfortable communication that all learners can flourish in."

Discussion

In answer to the research questions of this study, participants described the role of the instructor in online learning in many different ways. This role was dynamic and changed throughout the course. At times the instructor was expected to be an expert, demonstrating mastery and experience with the material. At other times, the instructor was a facilitator, prompting discussion with well-timed and well-tuned comments. In online instruction, the students have technical, content, affective, and cognitive concerns and are at different levels to which they expect the instructor to respond. Respondents commented from their own experience in an online course.

The online instructor is important to successful online instruction. While roles and expectations may be familiar to most students and instructors in a face-to-face classroom, they are not as well established online. The instructor takes on the role of guide and model to adult students. Unaccustomed to this new arena and unsure how to proceed in it, students take their lead from the online instructor. The online instructor's roles extend the responsibilities and skills required of the educator teaching face-to-face. To compensate for the reduced sensory cues, the instructor must be adept at communicating with students, employing the full capabilities of the technology, and responding to individualized learning styles and motivation. The asynchronous nature of online instruction that permits anytime and anywhere computer-mediated communication calls on the instructor to develop strategies to manage 24/7 communications, maintain momentum of the dialogue over time, and foster communities of learners.

Preplanning and introductory activities were important, so that participants came into the course with a positive attitude and had a clear understanding of how the course would proceed and what was expected of them. The instructor must engage the students from the outset, appealing to their learning styles and goals. Once launched, discussion must be deepened with relevant and meaningful prompts. In progress, the instructor needs to strike a delicate balance between being responsive to students, but not dominating. While students look to their instructor for expertise, they concurrently are creating their own knowledge and gaining insights from classmates.

These findings confirm adult learning principles that adults learn best in a safe, inclusive, comfortable environment where their opinions are respected, where their

learning has practical applications, where there are opportunities to share experience, and which accommodates different levels of self-direction.

The roles of the instructor might be thought of as on a continuum and in this way encompass the more complex nature of this instructional delivery environment. Rather than the instructor being seeing as predominately embodying one metaphor of an instructor, multiple roles, perceptions, and interactions need to be used in a flexible and student-centered manner.

It might be suggested that across such a scheme, a continuum of direct intervention, from lesser to greater, might be seen as follows:

Planner >>> Model >>> Coach >>> Facilitator >>> Communicator

However, this also has to be a dynamic continuum as the instructor shifts roles many times throughout an online course. Yet the concept of the continuum can assist in bringing the degree of direct intervention and "control" to the surface of awareness for the online instructor. Multiple and varying needs can be supported by fluid instructional roles. Seeing the online interaction as a dynamic flow of communication offers a different perspective that is rooted in the orientation of the adult learner.

Implications

The data also point to the impossibility of a comprehensive turnkey course or template applicable to many courses. Different groups and different content areas require individualized approaches to each course. The instructor's role is dynamic and intimately connected with all aspects of the online course, the content, the medium, the participants, and the process over time.

It might seem that online instruction simplifies the role of the instructor. However, these data indicate the need for the instructor's constant, continuing, informed, and observant involvement. The instructor needs to prepare her students for the online experience and lay out an organized curriculum with clear expectations. The instructor, to be effective, must be able to "hear" both the melody and harmony in participants' remarks.

Future research can further develop our understanding of not only communication, but also the personal, professional, and pedagogical meaning of such learning environments and experiences. Additionally, what does this evolving experience mean for our understanding of teaching and learning for both faculty and learners? Finally, in the area of faculty development, how do we best prepare and support faculty to discover the interpretation and application of adult learning principles to their online classrooms?

Conclusion

Initially, we suggested likening the role of the instructor to a leader of a band in her need to prepare, set the course and tap the talents of her musicians in different ways and at different times. Like the band leader, the instructor plans for the class performance, setting expectations and arranging the timing and technical environment. The instructor provides encouragement to involve individuals to broaden and deepen the online

discussion. As the facilitator, she lets the members perform throughout the course from start to finish. As a fellow "musician," she is expected to be a knowledgeable expert. She is expected, with limited cues, to communicate effectively with each individual for the good of the whole band. This online leader leads by example, and the collaborative corps of learners, each unique and contributing to the total, march forward with an unmistakable energy and goal of their own. It may be that the online facilitator strikes an initial "downbeat" and monitors a rhythm for teaching and learning that provides a foundation for student-centered and collaborative learning. In this case it would seem that the leader of the band has to be a distinctively different leader in order to be successfully perceived through this medium, environment, and learning community.

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