

**Reaching out from the virtual lectern:
Managing teaching presence in an online classroom**

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Disclaimer

This study has been conducted and documented for educational purposes only. The views expressed in this study are those of the author and do not necessarily reflect the opinions of interview subjects or other University X staff who supplied research information.

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Disclaimer

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Abstract

New ways of interacting and sharing information have transformed the relationship between students, faculty, and technology in distance learning and highlighted the importance of teaching presence as a factor in enhancing students' learning and satisfaction with their learning experiences. This study describes instructors' experiences with using the University X School of Business (UXSB) online learning environment to foster teaching presence and explores whether their perceived sense of presence contributes to their satisfaction with online teaching.

A qualitative, grounded theory approach guides the collection, interpretation and analysis of data from unstructured interviews with selected instructors, historical UXSB documents, and observations of course features and activities. However, this study also considers Garrison, Anderson and Archer's Community of Inquiry framework (2000) in exploring relationships between faculty, students and educational technology. Themes that emerge from analysis point to instructors' use of instructional design, interaction and direct instruction in establishing teaching presence. A relationship between instructors' sense of teaching presence and their satisfaction with online teaching also emerges from interviews. While the UXSB learning environment provides some support for instructors in building presence, there are also significant constraints to presence building that might impact their ability to interact with students and teach effectively.

Introduction

Background

The explosion of communications and computer technology in recent years has had a significant impact on educational institutions, particularly at the post-secondary level. Cellular phones, PDAs and other mobile devices and, more importantly, computer-based technologies and applications have transformed the ways in which students, instructors and administrators interact, at the same time as the Internet and digital repositories and databases have opened the window to a world of almost limitless information and methods for sharing, interpreting and storing it. This new technology has made it possible for many conventional classroom-based universities across North America to offer online distance education classes or programs as an adjunct or as an independent-study alternative to conventional face-to-face instruction to better meet the expectations of today's computer- and Internet-savvy students, who want flexible learning schedules, control over the pace and progress of their studies, and convenient access to top-quality educational materials and instruction without necessarily having to attend classes at an institution (Bates & Poole, 2003).

The transformation wrought by educational technology on the level of interaction and the ways in which information is provided to and shared by students and instructors in conventional universities has been even more dramatic for distance education institutions. Many "traditional" distance education universities, based upon "guided didactic conversation" principles (Holmberg, 1983), have relied on print and broadcast media—textbooks, television and radio broadcasts, audio and video recordings—to deliver university courses to off-campus

students, who work through their course materials alone and correspond infrequently with instructors or administrators via mail, e-mail or telephone. Since the 1980s, the growth of personal computing, computer networks, the Internet and social software—and their ability to support interaction between students and instructors—has revolutionized the design, development and delivery of distance education and the roles that instructors and students play in the learning process. This has been accompanied by “a shift toward constructive learning, in which learners are given the opportunity to construct their own meaning from the information presented during online sessions” (Ally, 2008, p. 39). In constructivist distance education models, students are expected and expect to be actively and socially involved in building knowledge and shaping the learning process. At the same time, distance education instructors must now manage a diverse range of technical skills and resources and actively participate in online course development, while also acting as facilitators and guides in helping students analyze, interpret and share information and build knowledge together.

One means that many institutions have adopted to help instructors manage the many tools and processes needed to support interaction and the development and presentation of online activities is learning management systems (LMSs). Learning management systems “provide instructors with a way to create and deliver content, monitor student participation, and assess student performance” (TechTarget, 2008) by integrating tools for doing so in a centralized online learning environment designed to allow instructors to exploit their pedagogical value. LMSs contain or support a host of synchronous and asynchronous communication features—e-mail, instant messaging, discussion boards, interactive activities, assignment and examination drop boxes, and social software such as wikis and blogs—as well

as tools for designing and managing text and multimedia course materials and for managing online classes. Several commercially produced, “proprietary” LMSs (e.g., Blackboard, WebCT, Desire2Learn, Lotus Notes) have become mainstays in distance education delivery in recent years, but a few open-source LMSs (e.g., Moodle) and other systems developed originally as “in-house” LMSs for specific institutions have also gained wider acceptance and use. LMSs provide instructors with centralized control over ready-made communication and course design tools that “facilitate the development process by providing a ready-made framework for course development” (Bates & Poole, 2003, p. 186).

Constructive learning models and standardized online course development and delivery via an LMS have not relieved instructors of any responsibility for assisting students or for guiding and directing their learning (Fahy, 2008). In fact, one principle that has emerged clearly as more institutions have adopted online learning is that instructors play a key role in ensuring that students reap the benefits of whatever educational technology is used and learn effectively in an online environment. Online learning holds the potential to open new worlds of “collaborative, cooperative, active, and self-directed learning,” but it requires “the guidance and leadership provided by a skilled instructor-moderator” to sort through the many resources and masses of information available to students to “achieve ‘meaningful understanding’ through interaction and collaboration” (Fahy, 2008, pp. 170-171). An instructor provides this guidance and leadership through the presence they project to students in the online learning process and environment. The link between students’ sense of an instructor’s presence, or “immediacy,” and their learning success and satisfaction in the classroom has long been recognized; students who receive active instruction and feedback and guided discussions with their peers and who

perceive that their instructor is actively engaged in their learning are more successful at achieving their learning outcomes and satisfied with the learning process (Gorham & Zakahi, 1990; Moore, Masterson, Christophel, & Shea, 1996). In today's active, learner-centered online environments, teaching presence—"the design, facilitation, and direction of cognitive and social processes for the purpose of realizing personally meaningful and educationally worthwhile learning outcomes" (Garrison & Arbaugh, 2007, p. 163)—assumes even greater importance as a cornerstone in ensuring that students derive the maximum learning benefit from their interactions and activities in the online environment and that they feel satisfied with their learning experiences.

In the face of the many changes in distance education delivery and philosophy that have occurred as institutions have embraced online learning and widespread use of educational technology, instructors must find creative new ways to project and manage a sense of their teaching presence and to gain a sense of personal satisfaction with their effectiveness as educators in a learning environment where they cannot visually monitor their students for signs of interest, engagement, or comprehension from the lectern. The challenge for distance education institutions lies in providing systems, software applications and technical and instructional support that will allow instructors to better project and manage their online teaching presence and, by so doing, gain a sense of personal reward and satisfaction with their effectiveness as online teachers.

Purpose of Study

The purpose of this study is to investigate the impact of some of the changes wrought by online educational technology on the teaching practices and strategies followed by three instructors in the School of Business at University X (UXSB), a large distance-education university. Through interviews with the instructors and observations of the learning environment in which UXSB courses are developed and delivered, the study describes and analyzes the instructors' experiences and perceptions with teaching online and using an LMS to project and manage their online teaching presence. In addition, this study examines how instructors' perceptions of their ability to manage their teaching presence impact the satisfaction they derive from online teaching. By analyzing the experiences of the individual instructors as they adapt to interacting with students online and designing materials that capitalize on the UXSB virtual learning environment, this study provides a "ground-level" view—a magnifying lens—of many of the challenges and issues facing all higher education institutions as they search for ways to deliver high-quality learning experiences that attract students in today's digital age. Conversely, though, this study is also aimed at exploring the valuable insights that each instructor's unique responses to these challenges and issues provide into the bigger issues surrounding the impact of technology on people's ability to interact and share meaning and knowledge—to learn—

together.

This study also has another, more pragmatic, purpose. Common themes and patterns identified in the teaching principles and practices followed by the various UXSB instructors can be used to highlight the most (or least) effective technology applications, course designs, and

instructional strategies within the UXSB learning environment. These, in turn, point to “promising practices” that can be developed to guide future course development and delivery strategies for UXSB instructors and to identify aspects of the course environment and the course development process that work well or that require attention. This study captures practical ideas that can be used by UXSB managers and course development professionals to develop distance education environments and support instructional practices and policies that allow instructors to build a strong sense of online presence and satisfaction with their teaching effectiveness.

Significance of Study

This study has practical significance as seen from an institutional, or workplace, perspective. Distance education institutions often experience high attrition rates in online learning courses and programs; among the reasons cited for high attrition rates are student feelings of isolation and lack of integration into the academic and social life of the university (Ludwig-Hardman, 2003). Identifying effective teaching and design strategies for enhancing teacher presence and integrating these strategies in new course designs and learning environments could enhance the quality of instruction for students and make them feel more connected to a UXSB online learning community, which should in turn improve student retention. In addition, the study examines factors related to managing teaching presence that impact instructors’ satisfaction with their online teaching roles; these factors provide a starting point for exploring modifications or enhancements to institutional policies and procedures that would improve faculty satisfaction, retention and motivation to innovate and improve courses and programs (Fredericksen, Pickett, Shea, Pelz, & Swan, 2000).

This study also has significance for distance education and educational technology researchers. By exploring the interaction between instructors, students, and the UXSB virtual learning environment and the critical role that instructors play in that relationship, it adds to the growing body of knowledge related to Communities of Inquiry, first postulated by Garrison, Anderson and Archer (2000). Garrison et al.'s theory of online learning, in which the teacher is the cornerstone in creating a learning environment that nurtures interactions between students, instructors and learning content, is applied and tested specifically in text-based computer conferencing and online applications over which the instructor has easy access and control. This study identifies similar features to those highlighted in Garrison et al.'s research and complements their exploration of teaching presence by extending its tenets to a less-manageable, larger-scale learning environment that contains several interactive features and a range of different communication tools. By doing so, it provides a response to Anderson et al.'s note that "the analysis of teacher presence could be extended to other components of the course" and invitation to "subsequent researchers to follow through on this approach" (Anderson, Rourke, Garrison, & Archer, 2001, p. 5).

Research Questions

The following research questions and sub-questions guide the collection, interpretation and analysis of data in this study:

1. What are the main factors that affect instructors' ability to create and manage teaching presence in the UXSB learning environment?
 - What are the perspectives of front-line faculty/instructors regarding the need to maintain and actively manage their presence online? i.e., Do they feel teaching presence is important? How does their perception of their role in the learning process affect the presence they project?
 - How do instructors feel the UXSB learning environment and processes constrains (or enhances) their ability to build teaching presence? i.e., What special problems or opportunities for building and managing teaching presence have instructors encountered in the UXSB environment?
2. How do front-line faculty/instructors foster a sense of teaching presence within the UXSB learning environment?
 - How do instructors use or adapt media and technology in the learning environment that they perceive to be effective for projecting and managing their perceived teaching presence?
 - How do instructors apply instructional or communication designs and strategies that they perceive to be effective for projecting and managing their perceived teaching presence??
3. How do instructors' perceptions of their teaching presence affect their sense of satisfaction with their online teaching effectiveness? How has this changed as the UXSB has evolved from a more "traditional" distance education teaching model?

Definitions

The following definitions are applied to terminology used in the research questions and throughout this study:

- *Distance education*: “Planned learning that normally occurs in a different place from teaching and as a result requires special techniques of course design, special instructional techniques, special methods of communication by electronic and other technology, as well as special organizational and administrative arrangements” (Moore & Kearsley, 1996, p. 2).
- *Online learning*: “The use of the Internet to access learning materials; to interact with the content, instructor, and other learners, and to obtain support during the learning process, in order to acquire knowledge, to construct personal meaning, and to grow from the learning experience” (Ally, 2008, p. 17).
- *Learning environment*: “Computer-based [learning] environments that are relatively open systems, allowing interactions and encounters with other participants and providing access to a wide range of resources” (Wilson 1996, p. 8).
- *Learning management system (LMS)*: “Software application[s] or Web-based technolog[ies] used to plan, implement, and assess a specific learning process...[that] provide an instructor with a way to create and deliver content, monitor student participation, and assess student performance” (TechTarget, 2008).
- *Interaction*: Based on Moore’s (1989) definition, interaction comprises three dimensions in online learning: student-content interaction; student-student interaction; student-instructor interaction.
- *Teaching presence*: “The design, facilitation, and direction of cognitive and social processes for the purpose of realizing personally meaningful and educationally worthwhile learning outcomes” (Anderson et al, 2001, p. 5).

- *Grounded theory approach*: “A qualitative research method that uses a systematic set of procedures to develop an inductively grounded theory about a phenomenon” (Strauss & Corbin, 1990, p. 24).

Context for Study

The research site for this study is the School of Business at University X, a large, government-funded Canadian distance-education university that offers a number of degree programs and university transfer courses to students at both undergraduate and graduate levels. (**Note:** University X is a pseudonym.) Based on traditional “open” distance education models, University X’s self-described approach to education is based on “excellence, openness, flexibility, and innovation” (University X, 2009). True to its “open” philosophy, University X imposes no entrance requirements on its 37 000 worldwide students and instead defines its mission as “[removing] barriers that restrict access to and success in university-level study and [increasing] equality of educational opportunity for adult learners worldwide” (University X, 2009). Unlike many universities, University X is not semester-based. Courses are offered predominantly through “individualized” (independent) study mode, so students register at any time of the year and develop their own schedules for course completion. Students can study anytime from anywhere in the world and receive academic and administrative support from instructors and other University X staff and resources via mail, e-mail, telephone, or fax.

University X has followed the path of “traditional” distance education institutions such as the Open University of the UK in defining the roles that academic staff, course development professionals, and administrative personnel serve to produce, deliver and support courses for students. It has adopted a faculty-based (called Centres) organizational structure, and uses

centralized departments to manage and distribute universally needed resources and staff—technical support, student services, and course development and delivery resource—among its various academic units. Like the Open University, University X has also based much of its success in designing courses and processes that cater to individual learners, based on the “guided didactic conversation” model espoused by Holmberg (1983) in which “the only important thing in education is learning by individual students; administration, counseling, teaching, group work, enrolment, evaluation are of importance only in so far as they support individual learning” (Keegan, 1998). Because students interact predominantly with their course materials, the design and production of top-quality, self-directed materials are essential to student learning as, by implication, are instructional design processes and staff. At University X, academic staff are responsible for researching and writing “raw” course materials, and for providing mail, e-mail or telephone tutorial/instructional support for their courses (often with the assistance of several “tutors” or “academic experts”) after the courses have been prepared for delivery to students. Course development professionals such as instructional designers, editors, and multimedia designers are responsible for converting course authors’ materials into high quality, pedagogically sound print or Web-ready course materials that students can access “anytime, anywhere.”

As an integral part of the university—it is responsible for roughly one-third of student enrolments and course offerings—the University X School of Business (UXSB) shares the university’s commitment to ensuring open access and high-quality learning experiences for its students, and it provides students with the same access to university services and resources as other centres. However, UXSB has developed somewhat different course development and

delivery systems and processes than the rest of the institution. For most academic centres in the university, the transition from print-based to online course delivery has evolved slowly over the last 10 years and is only recently gaining momentum, largely because of the implementation of a university-wide LMS. UXSB, on the other hand, faced with fierce competition for students and increasing student demand for online access to business programs, piloted its first online courses in 1999 and soon after made the switch to online learning, converting and redesigning the majority of its courses for Web delivery. IBM Lotus Notes® was selected as the backbone LMS for UXSB online course and student management; it provides a robust, Web-accessible environment for creating and integrating course materials and other resources, managing student assessment and grading, and collaborating with or facilitating collaboration between students. (Appendix A, “UXSB Learning Management Software” lists UXSB course development and delivery applications supported by the Notes LMS.) Moreover, as well as supporting a wide array of third-party applications that can be used to enhance teaching functionality (e.g., audio and video conferencing via Elluminate or VoiceThread), Notes contains groupware features such as peer-to-peer collaboration and workflow management tools (i.e., calendaring, group scheduling, team rooms, document libraries) that keep instructors connected to each other and to UXSB production and administrative staff and processes.

In addition to its early adoption of an LMS and Web course delivery, the UXSB has implemented other organizational changes that differ from conventional University X centres. In conjunction with its move to online learning, for instance, UXSB established a dedicated Call Centre to serve as an always-accessible, centralized information and support resource for its students. Call Centre advisors respond to telephone, fax, or e-mail questions from students

about administrative issues, examination and assignment information, or course-related problems, or they forward the questions on to academic or administrative experts for resolution. Unlike the individualized study models followed by other University X academic centres, in which students contact tutors directly via e-mail or by telephone (during scheduled contact times), the Call Centre acts as “the point of first contact for students enrolled in business courses” (University X School of Business, 2009a) and, for some self-study students, the only direct contact that they have with the university during the course of their studies.

The shift to online delivery from the print-based course models that were in place at the time also necessitated a restructuring of UXSB production resources and processes. UXSB has steadily recruited its own specialized and dedicated team of course- and web-development and systems professionals—instructional designers, editors, web and multimedia developers, and systems experts—to build and manage its online learning environment and the materials that go into it. It has also focused on forming course development and production processes that reflect the new realities of managing online course development and pedagogy. In the “old” University X model, course authors or instructors wrote their course, submitted it to University X media development department responsible for putting it into print, and then waited, often for a long time, to see what the instructional designers and layout specialists would produce from their raw materials. They had little direct involvement with course production and preparation for delivery until the finished package was sent out to students. The UXSB, on the other hand, has been working towards developing work processes that draw authors/instructors (referred to as “Course Coordinators” in the production process) more closely into course production and decision-making processes. During a typical course

production project, Course Coordinators work first with instructional designers to set learning goals and plan the structure of their online course, then interact with text editors and multimedia developers to prepare course content and interactive tools appropriate for the course design selected. (Appendix B, “UXSB Course Development Workflow” describes UXSB course development and production processes and the numerous points at which course authors have an opportunity to provide input.)

Assumptions

The following assumptions underpin the research design and the collection, interpretation and analysis of data in this study:

- Instructors are familiar with communications technology, and more specifically, with technology and processes in the UXSB learning environment, and they are familiar with the resources and systems provided for enhancing their teaching experiences.
- Instructors work within the learning environment and follow similar accepted procedures in managing the type and level of teaching presence they project (i.e., everyone is working with similar processes, technology and constraints).
- Instructors are motivated to make the best use possible of their learning environment to enhance student learning and satisfaction (i.e., they want to be good teachers).
- Instructors work in a distance education environment, in which there is an inherent reliance on communications technology to connect with students, so they may have more positive attitudes towards using technology for teaching and managing the presence they project online than instructors who work in conventional settings.

Limitations and Biases

The following limitations and biases have influenced the design, data collection and conclusions reached in this study:

- Researcher's lack of expertise in using chosen research methodology might limit the directions of inquiry.
- Researcher has experience and familiarity with interviewees. This familiarity might have allowed subtle visual cues to affect responses and, combined with interview inexperience, might have produced observer-caused effects; "*every* sort of observation method, whether or not it involves a human observer, may importantly influence the behavior of the subject matter" (Simon and Burstein, 1985, p. 246).
- Researcher works within the institution being studied and participates in the course delivery and development processes described by interviewees. The researcher might have unintentionally introduced observer biases, values, or judgments into this study; "*every* observer may be biased in one direction or the other" (Simon and Burstein, 1985, p. 242).

Several strategies have been employed in order to mitigate as many of these limitations as possible. To triangulate all observations and findings—"to look at [data] from several angles [rather] than to look at it in only one way"(Neuman, 2003, p. 138)—and to ensure that the small sample size provides a rich and representative source of data, information has been collected from a diverse range of resources and perspectives (e.g., observations of the online learning environment, interviews and follow-up interviews with selected instructors, textual analysis of student satisfaction surveys and relevant UXSB historical and procedural documents). The

researcher has tried to address observer bias and observer-caused effects by selecting interview participants with whom he is not socially involved and by observing courses to which he has not contributed significantly to instructional design or development. To enhance the validity of the study's results, copies of the final study report have been issued to interview participants and their feedback incorporated.

Literature Review

Online Learning Environments

Communications and computing technologies and networks have had a dramatic impact on distance education and the options available to instructors for developing effective distance learning environments for students. The Internet, in particular, has opened a door to a world of almost limitless content that can be accessed, stored, revised and reused as necessary, as well as multimedia materials and applications that “allow for the representation of knowledge in a variety of ways and [allow students to] see the application of [abstract] principles through an animation or a video example” (Bates & Poole, 2003, p. 60). Even more important than the enhanced capabilities they provide instructors with for accessing, presenting and sharing content with students, computer technology and the Internet have created opportunities never imagined by distance education pioneers for generating interaction and communication between instructors and students, and more particularly, between students themselves (Moore, 1989); some researchers have even postulated that “the exponentially increased abilities of distant student-to-student interaction, rarely enjoyed by previous implementations of the Internet, [have opened] a new generation of distance education” (Passerini & Granger, 2000, p. 3). By supporting synchronous and asynchronous interaction between students and instructors, online learning technology has spurred recent trends towards collaborative and constructive approaches to distance education, in which instructors teach students to “interact within their context to personalize information and construct their own meaning” (Ally, 2008, p. 38) and help them to share that meaning and knowledge with other learners, a trend likely to intensify

in the years ahead as educators find ways to implement social networking and Web 2.0 applications into the learning process.

Learning management systems (LMSs) have emerged as the main solution adopted by most institutions in North America for harnessing the numerous collaboration and content management applications into a single, scalable centralized online learning environment. Coates, James, and Baldwin (2005) point out that “they are becoming ubiquitous at universities around the world, adding a virtual dimension to even the most traditional campus-based institutions ” (p. 1). An LMS provides instructors with “a set of tools and a framework that allows the relatively easy creation of online course content and the subsequent teaching and management of that course including various interactions with students taking the course” (EDUCAUSE, 2003, p. 1). There are several advantages for instructors to using an LMS, the most obvious being that they “facilitate the development process by providing a ready-made framework for course development” (Bates & Poole, 2003, p. 186) that integrates communication, course development, and student assessment tools and support (technical and administrative) functions in one centralized, Web-accessible, easy-to-manage location. The common interface and standardized course design and learning tool templates provided in most LMSs can reduce the amount of time instructors dedicate to course development. Additionally, content created in an LMS can be readily stored, revised, and repurposed for other courses and students so that instructors can focus on “learning management rather than course management” (Ceraulo, 2005, p. 6). Perhaps the greatest benefit for many instructors, though, is that they control what goes into the LMS and how students access and use it;

instructors “[like] the way in which the LMS allow[s] us to retain control over the learning process” (Hotrum, 2005, p. 2).

Of course, not all practitioners and researchers view the features provided by LMSs as beneficial to effective online teaching. Because LMSs are large, centralized systems that serve multiple students and instructors, it is difficult to implement innovative individual course models or non-standard teaching strategies; as Black et al. point out, “Today’s LMSs are not customizable for instruction aimed at a specific audience with specific content” (Black, Beck, Dawson, Jinks, & DiPietro, 2007, p. 2). Standardized course designs and teaching tools, while providing some efficiencies for course development, can also constrain some instructors’ ability to think “outside the box” and to explore teaching situations and strategies that are not accommodated easily by the LMS: “Standardization and inherent values in [LMS] design can create a number of implications, which push teaching and learning in a particular direction” (McConachie, Danaher, Luck, & Jones, 2005, p. 1). An LMS environment provides instructors with more control over course and student management, but there is a danger that by doing so it also impedes students from taking control of their own learning and thus capitalizing on the full learning potential of innovations like the Internet and Web-based collaborative software; as Hotrum (2005) opines, “The LMS [has given] us a predefined learning environment based upon the classroom paradigm....As teachers, we [use] the LMS to collect and re-broadcast information, when we should [be] reveling in the freedom offered by the Internet, and facilitating the sharing of experience and the creation of learning” (p. 2).

Online Pedagogical Models and Roles

As online learning technologies have generated new and innovative methods for connecting instructors, students, and course materials, distance educators have evolved pedagogical models that reflect new understandings about how people learn and the best ways to use online environments to enhance their ability to learn. One of the keys to the instructional benefits provided by computing and Web technologies is their ability to support multiple types of interaction. The centrality of interaction to effective learning has long been recognized by education theorists; Anderson's (2008a) summary of John Dewey's (1916) experiential learning theory identifies interaction as a "defining component of the educational process" (p. 55), while Moore (1989) lists three types of interaction—student-content, student-student and student-instructor—that characterize effective learning situations and advises instructors to carefully cultivate the "type of interaction that is most suitable for the various teaching tasks of different subject areas, and for learners at different stages of development" (p. 23).

Early models of distance education, by their nature, focused on the interaction between student-content and student-instructor, ignoring student-student interactions. In these models, many of which reflect course development and design principles consistent with Holmberg's "guided didactic conversation" theory, learning at a distance is considered to be a somewhat isolated activity, in which learning materials are designed to replicate conversation between student and instructor and "the character of good distance education resembles that of a guided conversation aiming at learning and...the presence of the typical traits of such a conversation facilitates learning" (Holmberg, 1983, p. 1). "Learner independence and personal responsibility for educational outcomes" (Anderson, Annand, & Wark, 2005, p. 223) are the defining goals for

distance learning, and social interaction occurs only when the student contacts an instructor or administrator; otherwise, information is transmitted “one way” from instructor to student via texts or broadcast media such as television, video or audio recordings. As Figure 1 below illustrates, “real” and “simulated” interaction play equally important roles in stimulating the internal didactic conversation by which students learn at a distance:

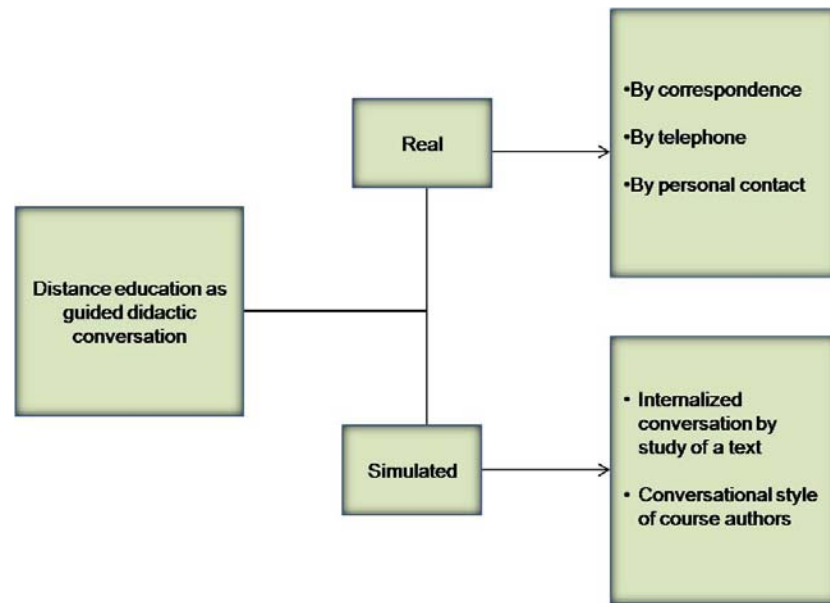


Figure 1. Interaction in guided didactic conversation (adapted from Keegan, 1998, p. 1)

For proponents of this learning model, the instructor’s primary responsibilities are, first, to design courses that contain everything students need to learn and navigate through the learning materials towards clear, predetermined learning outcomes, and second, to provide academic or expert guidance to supplement the “internal conversation” students have with their learning materials. This model has proven to be robust, widely applicable and popular for designing distance education materials and courses, but researchers also point out that it has left a legacy of inattentiveness to learner-learner interactions in distance learning models that has been an ongoing challenge for modern institutions to combat (Moore, 1989; Anderson 2008a, p. 57).

The ever-increasing array of learning technologies and communication tools for connecting students to each other, the institution, and the world of content and learning materials available to them on the Web has opened a new dimension for interaction that has transformed instructors' understanding of the nature of distance education. For many educators, Holmberg's (1983) concept of a student working alone with a carefully designed "package" of knowledge has given way to more social, learner-centered approaches to teaching that are now possible in online learning environments. Ally (2008) describes how distance learning systems have evolved from early deterministic models to more constructivist frameworks, in which "learners interpret the information and the world according to their personal reality, that they learn by observation, processing and interpretation, and then personalize the information into personal knowledge" (p. 19). In today's connected world, personalization of knowledge no longer takes place in isolation for distance learning students. Internet and computer communications allow distributed students to easily connect to other students and to their instructors, with the result that for modern distance educators "the social context of learning is critical. Ideas are rested not just on the teacher but also with fellow students, friends, and colleagues....what is taken to be 'valued' knowledge is also socially constructed" (Bates & Poole, 2003, p. 34). Like their counterparts in conventional classroom-based models, distance learners are active participants in building knowledge and meaning with their peers and others, and consequently, they have a high "need and desire for control over their learning environments" (Roblyer, 1999, p. 169) and want to control the pace and level of interactivity in their learning. This has led to a "major trend in teaching in higher education today...toward more learner-centered teaching...that focuses on the activities and outcomes of

the learner” (Bates & Poole, 2003, p. 43). This is not to say that distance-learning instructors play a reduced or insignificant role in social and learner-centered education. Garrison and Arbaugh (2007) assert that as opportunities for student-student interaction and interaction between students and an ever-wider range of content on the Web continue to grow, “interactions by themselves are not sufficient to ensure effective online learning. These interactions need to have clearly defined parameters and be focused in a specific direction” (p. 163). If students have become more active learners, distance-education instructors have also had to learn to become active teachers. Their role has shifted, to use an oft-used phrase, from being “the sage on the stage” who acts as the main provider of knowledge and instruction for students to being a “guide on the side” who acts as a moderator in bringing distributed students together online and helping them build knowledge together (Anderson, 2008b). Instructors’ primary responsibility is no longer to design course materials that allow students to work with as little social interaction as possible, but rather “to choose, adapt, and perfect, through feedback, assessment, and reflection, educational activities that maximize the affordances of the Web” (Anderson, 2008a, p. 68). They are expected to design online environments that support social learning and make effective use of realistic interactive content to facilitate the “scaffolding” of new knowledge for students by “[immersing] the learner in the situation, requiring him or her to acquire skills or knowledge in order to solve the problem or manipulate the situation” (Dodge, 1998). Knowledge scaffolding provides an effective means to promote high-order learning and to raise “learner knowledge...to a new level” (Garrison & Arbaugh, 2007, p. 164).

A related point also studied by researchers concerns the array of technical skills and practical knowledge that instructors need to meet the new role they play as “facilitators [and] intermediaries between students and the resources they need for their own independent study” (Bower, 2001). Early distance instructors required few more technical skills to communicate with their students than the ability to answer mail or the telephone. In order to take advantage of the many social- and interactivity-building advantages of online environments, distance educators today require, at minimum, basic computer and communication skills and a comfort level with adapting to new technology (Anderson, 2008b); in fact, Fahy (2008) contends that “in terms of student learning outcomes, the *teaching experience* of the instructor does not matter as much as the *instructor’s experience with technology*” (p. 171). Moreover, several researchers note that, compared to their classroom counterparts, online learning instructors can expect increased workload, preparation and course development time to develop online learning materials and deal with student issues related to course materials (Anderson et al., 2001; Cravener, 1999).

Bates and Poole (2003) actually describe this as a “critical issue” for educators as they admit that

teaching with technology is more work for the instructor than teaching face-to-face, at least initially. It is perhaps more accurate to say that the effective use of technology requires changes in instructors’ work patterns and in the organization and management of teaching...More work has to go into the front-end of teaching—the design and development phases. (p. 170)

In institutions where some of these aspects of course development and delivery are assigned to more qualified, centralized teams of experts for completion (e.g., instructional design, multimedia development, administrative tasks) instructors often face issues related to the

inflexibility and bureaucracy of the course development process and over who controls its various aspects (Bates et al, 2003).

Communities of Inquiry and Teaching Presence

One learning and teaching framework that has become popular for studying the dynamic relationship between instructors, students, and their learning environment in developing critical, high-order thinking skills is the “Community of Inquiry” framework (Garrison et al., 2000). Reflecting its constructivist approach, the underlying principle of the framework is that a community of learners can be formed online to achieve “a successful higher educational experience” (Garrison et al., 2000, p. 87) through the effective interaction of three essential elements: **social presence**, or “the ability of learners to project themselves socially and emotionally, thereby being perceived as ‘real people’ in mediated communication” (Garrison & Arbaugh, 2007, p. 159); **cognitive presence**, or “the extent to which learners are able to construct and confirm meaning through sustained reflection and discourse” (Garrison & Arbaugh, 2007, p. 161); and **teaching presence**, or “the design, facilitation, and direction of cognitive and social processes for the purpose of realizing personally meaningful and educationally worthwhile outcomes” (Garrison & Arbaugh, 2007, p. 163). Figure 2 on the following page illustrates the relationship between the three elements.

Each element of the framework makes a critical contribution towards building a “community of inquiry” in which learners and teachers interact and communicate as they construct deep and meaningful learning. Cognitive presence is generated by “an environment that supports the development and growth of critical thinking skills,” (Anderson, 2008b, p. 344)

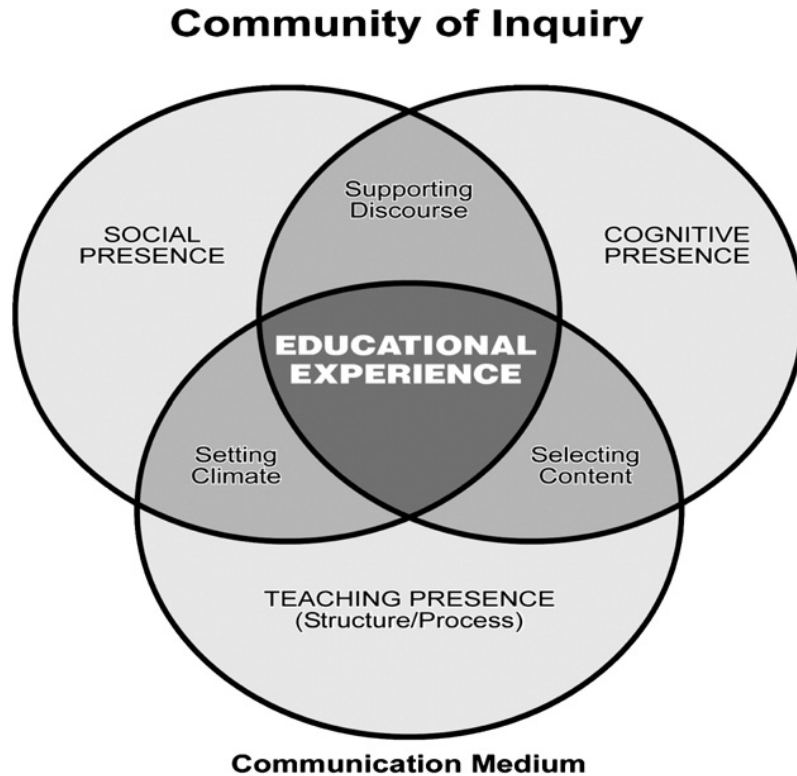


Figure 2. Community of Inquiry framework. From Garrison et al., 2000, p. 88. Used with permission of the author.

but students require the supportive environment of a strong social presence to “feel the necessary degree of comfort and safety to express their ideas in a collaborative context, and to present themselves as real and functional human beings” (Anderson, 2008b, p. 344).

Furthermore, as important as cognitive presence and social interaction are in providing an environment conducive to the reflection and discourse essential for high order thinking, “high levels of interaction...do not directly create cognitive development or facilitate meaningful learning and understanding... teaching presence in the form of facilitation is crucial in the success of online learning” (Garrison & Cleveland-Innes, 2005, pp. 135-136). Teaching presence provides the organizational and directive structure that enables students to maximize cognitive and social presence—to function as a community of inquiry—in their online environment.

In the framework, teaching presence has three aspects that fall under the instructor's direct control: instructional design and organization, facilitation, and direct instruction. Each of these three aspects is further broken down into specific tasks that instructors can perform to manage and use this aspect of teaching presence effectively. The practices described by Anderson et al. (2001) correspond to the seven principles of good practice for online teachers outlined by Chickering and Ehrmann (1996), as summarized in Table 1 below:

Table 1
Practices for Managing Teaching Presence

<i>Teaching Presence Aspect</i>	<i>Community of Inquiry (from Anderson et al., 2001)</i>	<i>Principles of Good Practice (from Chickering & Ehrmann, 1996)</i>
Instructional design and organization	<ul style="list-style-type: none"> • Set curriculum • Design methods • Establish time parameters • Utilize medium effectively • Establish netiquette 	<ul style="list-style-type: none"> • Use active learning techniques (and technologies) • Emphasize time on task • Communicate high expectations
Facilitation of discourse	<ul style="list-style-type: none"> • Identify areas of agreement and disagreement • Seek to reach consensus and understanding • Encourage, acknowledge and reinforce student contributions • Set the climate for learning • Draw in participants and prompt discussion • Assess efficacy of the process 	<ul style="list-style-type: none"> • Develop reciprocity and cooperation among students, • Respect diverse talents and ways of learning
Direct instruction	<ul style="list-style-type: none"> • Present content and questions • Focus the discussion on specific issues • Summarize discussions • Confirm understanding • Diagnose misconceptions • Inject knowledge from diverse sources • Respond to technical concerns 	<ul style="list-style-type: none"> • Give prompt, assistive feedback. • Encourage contacts between students and faculty

While all three types of “presence” have been widely studied and reported on in the literature (Garrison and Arbaugh (2007) provide a detailed listing of the growing body of research related to different aspects of social, cognitive , and teaching presence), emerging research has focused on teaching presence as a particularly important aspect of the Community of Inquiry framework. Researchers have characterized students’ sense of an instructor’s presence as a significant determinant of their sense of community (Swan, 2002) and satisfaction with instructors (Richardson & Swan, 2003), instructional quality (Swan, Schenker, Lin, Shea, & Aviv, 2006), and learning effectiveness (Shea, Pickett, & Pelz, 2003; Varnhagen, Wilson, Krupa, Kasprzak, & Hunting, 2005). Recent studies (e.g., Garrison & Cleveland-Innes, 2005) have explored the “complementary” nature of the relationship between teaching presence and cognitive presence by which “course design, structure and leadership significantly impact the extent to which learners engage course in a deep and meaningful manner” (Garrison & Arbaugh, 2007, p. 163).

The relationship between the presence projected by an instructor and its impact on students’ ability to learn has long been a subject of study by education and communications theorists. Interest in the mediating effects of technology on an instructor’s ability to project presence, for instance, has roots in Short, Williams, and Christie’s (1976) Social Presence theory. This theory postulates that an individual’s attitudes towards different communications media affect their perception of the medium’s ability to convey social presence, defined as the “degree of salience of the other person in the [mediated] interaction and the consequent salience of the interpersonal relationships” (p. 65). Other research stemming from Wiener & Mehrabian’s (1968) early studies on non-verbal “immediacy” behaviours and Argyle and Dean’s (1965) work

on the effect of body language on conversational “intimacy,” for instance, is also closely related to research about the role of teaching presence and focuses on similar issues and questions, albeit from a classroom perspective. A strong sense of instructor immediacy—created by using teaching behaviours such as addressing students by name, encouraging involvement, offering individualized feedback, maintaining relaxed body posture and eye contact—has been associated with improved student motivation (Christophel, 1990), satisfaction with instructional quality (Moore, Masterson, Christophel, & Shea, 1996), and perceptions of affective and cognitive learning (Gorham & Christophel, 1990; Gorham & Zakahi, 1990). Recent research has focused on immediacy effects in asynchronous environments, where non-verbal cues and body language are difficult or impossible to replicate, and is aimed at finding ways “to work within the limitations imposed by the Internet to create immediacy...in online instruction” (LaRose & Whitten, 2000, p. 332) through the use of synchronous communications technology and instructional design.

Managing Teaching Presence

The Community of Inquiry framework contains a prescriptive dimension insofar as Garrison et al. (2000) describe it as a template for “identifying, assessing and facilitating cognitive, social and teaching presence in asynchronous, text-based computer conferencing” (p. 103). The clearly defined criteria by which Garrison et al. identify and evaluate teaching presence, by implication, point to best practices for effectively managing or enhancing the three components of teaching presence. Several other studies describe strategies for enhancing teaching presence through effective teaching practices; as mentioned previously, Chickering and Ehrmann’s (1996) “seven principles” of good teaching practice recommend strategies aimed

at enhancing teaching presence and community-building, and in her “5-stage Model of E-learning,” Salmon (2006) provides even more detailed instructional strategies and “e-tivities” for online instructors to establish their online presence and facilitate student interaction and learning. She highlights the interpersonal and mediating dimensions of the “e-moderator’s” role and emphasizes that “successful online learning depends on teachers and trainers acquiring new competencies, on their becoming aware of [e-learning’s] potential and on their inspiring learners rather than mastering technology” (p. vii). Similarly, Heuer and King (2004) propose five interactive “roles” and their associated tasks that online instructors must fulfill in interactions to foster a sense of presence in their courses: planner, modeler, coach, facilitator, and communicator. Their classifications highlight the interpersonal and social nature of the online instructor’s duties, and reflect similar organizational and instructional functions to those described in the Community of Inquiry framework.

Another factor in building teaching presence that has been extensively studied is the inherent effects that different media or technology have on the type of presence conveyed online. Research in this field also stems from Short et al.’s work on Social Presence theory. Part of their hypothesis speculates that people attribute certain properties to communications media that affect their perceptions of how those media convey presence, so that “the suitability of any given communication medium for a specified type of interaction will depend upon two things: the degree of social presence of the medium, and the degree of social presence required by the task” (1976, p. 75). There is agreement among researchers (Walther, 1992; Gunawardena, 1995) for the idea that different technologies have properties that can be manipulated to influence the type and quality of teaching presence that instructors are able to project to their students; an

introductory video or real-time chat from an instructor discussing her “biography” and research interests, for example, is likely to convey a different sense of the instructor’s presence to her students than a written description or a static Web site. Garrison et al. (2000) advance the possibility that “it may be that different media have different potentials to address cognitive, social and teaching presence” (p. 92). Researchers posit that the most effective learning occurs when the presence needed for teaching matches the technology’s ability to convey it, so it falls to both distance learning instructors and those in blended or more conventional settings to carefully consider whether the presence they project online matches their pedagogical goals and to select the best technology for projecting it: they “need to assess which type of interaction will best suit [their] needs in teaching and which media or technology will best provide that type of interaction” (Bates & Poole, 2003, p. 100).

Teaching Presence and Faculty Satisfaction

While much has been written about the many factors that impact faculty satisfaction at the post-secondary level in both classroom-based and distance learning institutions, little research exists that looks directly at the relationship between an instructor’s sense of online presence and their sense of satisfaction with online teaching effectiveness. Researchers have commented on the need for further research in this area; Richardson et al. (2003), for example, point out that, “from the instructors’ perspective, research needs to be conducted to determine the extent of the influence of social presence on...instructor satisfaction with courses taught” (p. 81). Much of the literature focuses on advances in online interactivity and their resultant effect on faculty satisfaction; this literature also provides some insight into aspects of teaching presence management that impact instructors’ satisfaction.

Instructors place a high value on the quality of interactions they have with students or facilitate between them; Thompson (2003) cites the results of an American Faculty Poll in which higher education faculty rated “one of the most important factors...in their decision to pursue an academic career was the enjoyment of working with students” (p. 194). Among the factors that make online teaching “personally rewarding and satisfying” for faculty, Thompson counts increased access to students, higher quality interactions with students, and positive student outcomes. Bowers (2001), too, characterizes quality of interaction with students as a central factor in many online instructors’ sense of personal reward and satisfaction—“to see the spark of understanding begin to glow in the eyes of a student who has been struggling with a concept, to see confidence build, these are the “big payoffs” of teaching for many instructors” (p. 3)—but she shares the view of other researchers (Shea, Fredericksen, Pickett & Pelz, 2002) that factors extrinsic to the teaching process affect the quality of interaction, or presence, that instructors share with their students: design of online learning environment, communication with course and interface developers, and the level of instructional and technical support for course delivery. One study, however, (Fredericksen et al., 2000) makes a direct connection between faculty’s sense of personal satisfaction and the strategies they use for building teaching presence. Fredericksen et al.’s research demonstrates that faculty are most satisfied when they perceive that their online presence is directly helping students to interact with their course materials and each other to construct knowledge: “Successful, satisfied on-line instructors have effective course designs and effective teaching practices” (p. 14). As their research demonstrates, institutional strategies and policies that facilitate each instructors’ ability to create a strong sense of their presence—“instructional design assistance, technical support, training, collaborative

experiences, and printed and Web-based faculty materials” (pp. 2-3)—play a significant role in developing a culture and environment in which instructors feel rewarded and satisfied with their online teaching role and sense of connection to their students.

Methodology

Rationale for Research Design

The design of this study is based on qualitative research and analysis principles; more specifically, the study design and data collection and analysis procedures are based on the grounded theory approach described by Strauss & Corbin (1990). A qualitative perspective is well-suited to an exploration of “teaching presence” in a collaborative and interactive environment such as the distance education centre in which this study is conducted as it draws upon locally grounded data and provides “thick descriptions” of events that are “vivid, nested in a real context, and have a ring of truth” (Miles & Huberman, 1994, p. 10). The purpose of the study is to understand instructors’ experiences and perceptions of managing teaching presence in the UXSB learning environment and to observe the ways in which they interact with students and course materials within a dynamic social context—a good fit for a qualitative approach, with its emphasis on “naturally occurring events in natural settings...[and] on what ‘real life’ is like” (Miles & Huberman, 1994, p. 10).

Moreover, in keeping with qualitative methods, the data collected and conclusions formed are aimed at describing specific conditions and events that occur within UXSB; that is, “the emphasis is on a single case, a focused and bounded phenomenon embedded in its context” (Miles & Huberman, 1994, p. 10). Teaching presence is a subjective and difficult-to-quantify concept, and the study has a descriptive and exploratory objective, so a qualitative approach, which “can give the intricate details of phenomena that are difficult to convey with quantitative methods” (Strauss & Corbin, 1990, p. 19), might better capture the richness and

depth of instructors' perceptions and feelings than standardized questions, surveys and other quantitative analysis techniques. The inductive nature of the grounded theory method provides an enlightening means of relating the experiences and events that occur in the UXSB to a broader theoretical framework of issues facing all higher education institutions as they search for ways to deliver high quality learning experiences to today's students.

Researcher's Role

While every effort has been made to maintain the researcher's objectivity in this study, the researcher's closeness to the subjects and site being researched necessarily impact the level of objectivity maintained. Indeed, most qualitative research is better served by an observer-participant who has some personal understanding of and empathy for the subjects being studied; as Neuman (2003) points out, qualitative researchers "should reflect on, reexamine, and analyze personal points of view and feelings as a part of the process of studying others....The researcher's proper role is to be a 'passionate participant' ...involved with those being studied" (p. 80). In keeping with their approach to qualitative research, Strauss et al (1990) describe the skills of an effective researcher as being "grounded" in the social context and issues being studied: "theoretical and social sensitivity, the ability to maintain analytical distance while at the same time drawing upon past experience and theoretical knowledge to interpret what is seen, astute powers of observation, and good interactional skills" (p. 19).

The researcher has worked as an instructional designer and editor at UXSB for nine years, and am well-acquainted with the interview subjects, learning environment, processes, and issues being explored in this study. While this means that he might have unintentionally introduced observer biases, values, or judgments into the study of the UXSB workplace, his

knowledge of the study site gives him a good perspective from which to consider the experiences described by instructors and to understand the issues facing all educators as they interact with students in a virtual learning environment. The researcher has endeavoured to be as objective as possible in analyzing events and people, or to be forthright about reporting any biases of which he is aware. To ensure the integrity of the study's conclusions and to triangulate the data, a diverse range of different data sources has been explored and interview candidates have been selected with whom the researcher has no close social ties.

Before any data collection or formal work on this study was undertaken, approval was obtained from the University X Research Ethics Board and the Faculties of Education, Extension and Augustana Research Ethics Board (EEA REB) at the University of Alberta to conduct my project.

Research Design Description

Grounded theory approach “uses a systematic set of procedures to develop an inductively derived grounded theory about a phenomenon” (Strauss & Corbin, 1990, p. 24). Data collection and analysis are governed by underlying general principles of “constant comparison” and the “asking of questions.” Strauss & Corbin divide this systematic set of procedures into different “stages” — developing a research question; using theoretical sampling to collect data; analyzing data through a progression of open, axial, and selective coding procedures and a review of the relevant literature; generating theories based upon the analysis. However, data collection, analysis and coding take place simultaneously and continuously during the study; in grounded theory, “data collection and data analysis are tightly interwoven processes, and must occur alternately because the analysis directs the sampling of the data” (p.

59). This study draws upon Pandit's (1996) adaptation of Strauss & Corbin's research stages as an operational framework for applying grounded theory principles, as described in Table 2.

Brief descriptions of the activities that were carried out in each of the five stages are listed below

Table 2; detailed accounts of data collection and data analysis procedures followed are described in later sections of this report.

Table 2
Application of Grounded Theory to Design of Study

<i>Study Stage*</i>	<i>Grounded Theory Stage**</i>	<i>Activities Performed</i>
Research design	Review technical literature. Form research question. Theoretical sampling.	Review literature and ideas for study. Form research question and basic design. Select initial cases and data sources.
Data collection	Theoretical and purposive sampling from: <ul style="list-style-type: none"> • interviews • historical data from UX • course sites 	Triangulate data collection by using multiple sources of data. Arrange and conduct interviews. Collect data from UX website; arrange for copies of UXSB documents. Obtain access and observe learning environments.
Data ordering	Coding preparation	Prepare interview transcripts. Highlight relevant secondary data or prepare documents for coding.
Data analysis	Open coding	Compare data. Apply initial data labels and categories. Document coding notes.
	Axial coding	Examine and compare data categories. Link categories and develop and relate subcategories. Verify categories to data.
	Memoing	Record analysis notes, operational notes, coding memos and notes.
	Selective coding	Identify emergent themes and relationships. Formulate conclusions.
Literature comparison	Compare themes and relationships to technical literature	Review literature and draw relevant comparisons. Build analysis and draw conclusions. Write final report.

Research activities move back and forth between these phases.

* This application of Strauss and Corbin's (1990) approach is adapted from Pandit (1996, p. 1).

** Adapted from Strauss and Corbin (1990).

Stage 1: Research Design

This study had an anecdotal genesis, suggested by different discussions that occurred among academic and professional course development staff in UXSB. In keeping with a grounded approach, a review of both technical and non-technical literature (e.g., University X student satisfaction surveys, IT planning documents and memos) related to learning systems and instructor management of teaching and social presence was conducted to clarify the research question and to identify “areas where concepts are open and unclear, where perspectives are left out and assumptions need to be challenged” (Auerbach & Silverstein, 2003, p. 20). After refining the research question and selecting a grounded theory study design, boundaries were established for the case and purposive sampling was used to determine preliminary data collection strategies. The Community of Inquiry framework was reviewed and used as a starting point for theoretical sampling and data collection planning.

Stage 2: Data Collection

In-depth, face-to-face interviews with faculty members formed the primary source of data for this study. Interviews were open-coded as soon as transcripts were prepared and a preliminary list of codes was developed that was used to suggest avenues for further theoretical sampling and data collection. Data and the preliminary codes and labels were triangulated with secondary data, comprising UXSB historical and organizational documents and websites, as well as first-hand observations of courses developed and taught by interviewees. Analytical, operational and coding notes, relevant historical excerpts, and notes or excerpts from secondary data were also collected and printed.

Stage 3: Data Ordering

Because this study explores and compares the individual perceptions and processes by which each instructor builds their own sense of teaching presence, the time sequence and ordering of data were not issues in this study. However, this step provided an opportunity to ensure that all data collected were organized, easily accessible and locatable, and ready for coding and analysis. Processes undertaken in this step included preparing transcripts from all interview audio-recordings, printing and preparing copies of University X and UXSB organizational documents for coding and analysis, and collecting and organizing coding notes and analytic memos. As the study evolved, a master list of codes and coding categories was also developed. Data ordering and preparation occurred regularly throughout the study.

Stage 4: Data Analysis

In preparation for open coding, a preliminary list of data codes and categories was developed, based partly on descriptors from the Community of Inquiry framework. In an effort to enhance theoretical sensitivity, the researcher applied Strauss & Corbin's (1990) "questioning" techniques to reflections about the data being collected in order to generate ideas for coding and for "[asking] questions more precisely in the next interviews, or of any pertinent readings in the literature" (p. 77). As data collection and open coding evolved, new codes were added to the coding list and recurrent codes and data categories emerged. During axial coding, the next analytical phase, codes and categories of data were compared and reduced into more comprehensive lists of codes, categories and sub-categories. While every attempt was made to verify the accuracy and validity of these codes by checking them against the data, it should be noted that, given more time and resources for the study, their reliability might have benefited

from having a second researcher read and independently interpret the transcripts. Operational and analytical memos were also examined, coded and analyzed. Finally, selective coding was used to link categories and identify themes that were used to draw conclusions about UXSB instructor perceptions.

Literature Comparison

After coding had revealed the major themes generated by the data, a review of the literature was conducted to explore relevant frameworks for describing and relating the themes. Data were inductively compared to previous findings in the literature; similarities and differences were highlighted and used to draw conclusions about presence-building processes within the UXSB learning environment.

Data Collection

Purposive sampling was used to direct the initial selection of interview participants and historical data sources for this study (Miles & Huberman, 1994). Instructor-interviewees were selected on the basis of their experience—teaching experience (both classroom and online teaching experience); University X work experience (tenure-track faculty with at least five years' experience at University X); experience with UXSB course development and teaching environment (developed and taught at least one online UXSB course within the previous six months)—and academic diversity (each interviewee teaches in a different sub-discipline). Due to time constraints for completing the study and the difficulty of locating distributed faculty during summer, a list of six potential participants was generated, from which an initial sample size of three instructors was selected on the basis of interviewees' compliance with these criteria

and their availability. Historical and organizational documents were also chosen for sampling on the basis of their potential to reveal information related to interacting with students and building presence in the UXSB learning environment. In order to “triangulate” data obtained from interviews—“to look at something from several angles [rather] than to look at it in only one way” (Neuman, 2003, p. 138)— multiple sources of data, as described below, were collected for analysis.

Interviews

In-depth, unstructured, face-to-face interviews with faculty members formed the first-collected and primary source of data for this study. Three selected instructors agreed to participate in the study and they accordingly provided their informed consent to be interviewed (see Appendix C, “Information Handout and *Informed Consent Form*”), as well as verbal approval to record the interview. Interviews took approximately one hour to conduct, and were digitally recorded for later transcription. The researcher also recorded notes and highlighted points to guide the discussion as the interview progressed. An interview guide, rather than a formal interview script or questions, was used to keep discussions focused and structured, and to ensure that all required information would be collected from each interviewee (see Appendix D, “Interview Guide”). Interview questions were open-ended and largely unstructured, and encouraged participants to talk freely about their strategies for and experiences with managing their online presence and their perceptions about teaching in the UXSB learning environment. Transcripts and field notes were prepared immediately after each interview. Transcripts were then forwarded to interviewees for their review and verification (see Appendix E, “Interview Transcripts”). Interview and field notes and transcripts were open-

coded to generate ideas for shaping consecutive interviews and course site observations. To protect the anonymity and confidentiality of interviewees, they are identified anonymously as “instructors” and “interviewees” in subsequent references in this study.

Course Website Observations

In conjunction with interviews, permission was obtained from the University to collect data from UXSB course websites and the researcher accessed one online course designed and instructed by each of the three interview participants. Two of the courses observed were introductory, high-enrolment courses (approximately 50 or more continuously enrolled students) in their respective disciplines, while the third was an advanced, low-enrolment senior-level course. The course sites accessed were copies of “live” courses and contained no student assignments, e-mails or discussion board or instant messaging comments. These courses were explored to collect first-hand information about design elements, interactive features, and technology applications described by interview participants. Data collected from the three different course sites was useful for supplementing or clarifying information provided by interviewees and for gaining insight into the conditions and constraints under which they manage their teaching presence online. Course-site data was also coded and compared to interview and historical data, and subsequent amendments were made to coding labels and categories on the basis of the new information being evolved from the various data sources. Again, to assure the anonymity and confidentiality of the interviewees, courses are identified anonymously in subsequent references.

Historical and Contextual Documents

University X and UXSB historical and contextual documents form the final source of secondary data collected for this study. Ideas for “leads” about locating documentation were generated by interviews and discussions with UXSB course production and development professionals. Approval to access and use UXSB documents was obtained during the study’s ethics approval process. Student satisfaction surveys contributed valuable contextual information regarding student perspectives on instructor presence and satisfaction with instructional support. One of these documents surveys students who have experienced more than one type of University X delivery mode (individual study with tutorial support versus individual study with Call Centre and tutorial support) and summarizes their perceptions of the levels of “presence” they felt in each mode. Other contextual data sources worth mentioning include the *UXSB Student Support Committee Report*, an as-yet unpublished analysis of faculty perspectives on UXSB course development, delivery and support processes, and University X and UXSB strategic planning documents, which contain information about Centre and institutional goals and plans. Copies of each of these documents were obtained for analysis and, as analysis and data collection progressed, coding and operational notes and analytical memos were compiled and integrated into the analysis. Each of these secondary data sources added to or clarified existing code labels and categories.

Data Analysis

Data analysis procedures used in this study were based on the “constant comparative method of analysis” outlined by Strauss & Corbin (1990), which relies on two main analytical procedures—“the asking of questions about data and the making of comparisons for similarities

and differences between each incident, event, and other instances of phenomena” (p. 74)—to explore relationships and reveal themes in data. As the first step in analysis, though, information collected from interviews, course sites, and historical sources had to be prepared for analysis. Interview and field notes were retyped, revised as necessary, and printed, as were notes from course site observations. Relevant excerpts from UXSB historical data and documents (e.g., *UXSB Student Support Committee Report*, *Strategic University Plan*) were also printed and sorted for analysis. Immediately after completing each interview, audio-recordings of the interview were transcribed verbatim (with minor edits to remove pauses, repetitions, etc.) and printed.

Open coding of interview transcripts and field and interview notes, the first level of analysis in grounded theory, was performed on each piece of data immediately after it was collected and prepared for analysis. During this stage of analysis, data were deconstructed into discrete parts and closely examined and compared, and questions about the data and its relationship to the the study’s research focus were generated. Before conducting interviews, the first source of data collected for analysis, the Community of Inquiry model (Garrison et al., 2000) and related literature were consulted as a starting point for developing a preliminary list of codes—“tags or labels for assigning units of meaning to the descriptive or inferential information compiled during a study” (Miles & Huberman, 1994, p. 56)—and code categories to apply to textual data. After the first interview transcript was prepared, it was reviewed reflectively, then re-examined using sentences, or more frequently, concepts or entire responses as units of analysis. Applicable codes were noted in the margins of the transcript. Open coding generated new codes, which were added to the master code list, as well as refinements and

clarification to existing codes. A comparison of emerging codes highlighted common properties that were refined and reduced into coding categories and sub-categories. Changes to code and category descriptions and ideas for shaping future analysis and data collection were recorded in coding and operational notes, respectively, as open coding progressed. A similar iterative process of building the master code list and adding code labels to concepts was applied to first-level analysis of the other two interview transcripts and excerpts of UXSB historical documents and field notes.

As open coding advanced, the descriptive codes attached to the various data began to reveal patterns and similarities that shifted analysis into the axial coding phase, in which the data deconstructed during open coding are “put back together in new ways by making connections between a category and its sub-categories of data” (Strauss & Corbin, 1990, p. 61). Pattern coding was used to “identify emergent themes, configurations, or explanations” (Miles & Huberman, 1994, p. 68) in the relationships that were appearing between categories of coded data and many of the coded concepts from the various data sources. A comparison of coded categories from interview transcripts, for instance, highlighted patterns that provided insights into the UXSB social context and conditions that affect each instructor’s online teaching experiences, and into similarities in each instructor’s response to their environment and strategies for dealing with it. Links between these categories and concepts that appeared in University X historical documents added to the picture forming of the UXSB learning environment. Notes about pattern codes and the relationships they describe were recorded in analytical memos, and new pattern codes and coding categories were added to the master code list to inform the open coding performed on the last pieces of data collected.

As the relationships between different coding categories and patterns began to emerge more clearly, analysis evolved naturally into its final stage of selective coding. Relationships, patterns and concepts that had emerged during axial coding were further refined into themes that provided full-bodied descriptions of the relationships and patterns that characterize instructors' experiences at UXSB. Coding notes and analytical memos also contributed to identifying or clarifying themes in the coded data, as did contextual data collected from course sites and University X historical sources. To confirm their internal consistency and representative quality (Neuman, 2003, p. 388), themes were verified against the relevant data sources. An increasingly clear picture began to form about conditions in UXSB, which prompted a review of the literature—particularly literature related to the Community of Inquiry framework—for explanations and insights into these themes developed by other theorists. The final stage of analysis highlighted dominant themes that characterize instructors' experiences with establishing an online presence and interacting with students in the UXSB learning environment.

Findings

Introduction

Interview questions were aimed at probing instructors' strategies for developing presence and their experiences with teaching in the UXSB online learning environment. Data coding and analysis of their responses revealed four dominant themes:

- Establish presence through instructional design
- Enhance interaction to foster presence
- Provide expert leadership
- Ways to satisfaction

In addition to the main themes, several sub-themes emerged as listed in Table 3 below. Descriptions of each of the main themes and sub-themes (*bold italic text*), along with representative remarks collected from interviews or other relevant data, follow Table 3.

Table 3
Major Themes and Sub-themes

<i>Major Theme</i>	<i>Sub-theme(s)</i>
Establish presence through instructional design	<ul style="list-style-type: none"> • Plan design • Make use of structural elements • Choose appropriate technologies and activities • Obstacles to presence-building
Enhance interaction to foster presence	<ul style="list-style-type: none"> • Add personality to course materials • Increase immediacy • Involve students in course development • Constraints on interaction
Provide expert leadership	<ul style="list-style-type: none"> • Personalize instruction • Increase direct instruction and personal contact • Provide expert knowledge • Obstacles to direct instruction
Ways to satisfaction	<ul style="list-style-type: none"> • Help students achieve their learning outcomes • Level of interaction

Establish presence through instructional design

The most dominant theme expressed by interviewees related to the primacy of instructional design for establishing a sense of their teaching presence. Each instructor focused on *planning the design* of their course as a crucial first step in building a learning environment that matched their pedagogical goals and conveying the type and level of presence appropriate for meeting those goals. Each instructor used a metaphor to represent their vision of the learning process and their role in it, and used similar terms to explain the course design model they were using and the type of presence they wanted to convey. One interviewee described the teaching role to be like directing a movie, in which the “movie” simulates real-life experiences and students are immersed in their learning experience “the way movies involve people.” Working “in the background as a producer,” this interviewee designed each course as an “instructional kit...a complete learning environment for the student who wants to learn alone” in which students could immerse themselves as if they were watching a video or movie. Another instructor described learning as “a journey of inquiry and discovery” and interpreted the role of the teacher as a guide in helping students along their “shared approach” to learning; true to this vision, this interviewee’s sparse course design was an unexplored vista that was “completely shapeless...it’s shaped by the student.” The third instructor, while more succinct in describing a metaphor, likened the ideal course model to a classroom, where “students have problems, they ask [them], and the response is immediate”; this instructor accordingly implemented a course design aimed at reproducing the immediacy and interactivity of a live classroom.

As part of design planning, instructors also drew attention to the importance of choosing a course design that conveys an appropriate level or type of presence for the content being delivered and for the knowledge level of different students. One of the two interviewees who taught an introductory-level course, for instance, commented that “for these courses, there are so many skills, so many rules, so many figures that they have to go through that it is really a very controlled progression,” while the other introductory-course instructor was even more pointed in assessing that the level of presence needed “depends on the course. My course is an introductory course so you have to do a bit more handholding than for other courses.” Even at a senior level, venturing into new knowledge areas can fill students with “feelings of dissatisfaction, perplexity, even almost deep-seated concern about where [they] are going— [and] they don’t like being perplexed.” Instructors thus agreed that the course design applied should convey an appropriate level of teaching presence to match the complexity of the content being presented as well as students’ level of learning and expected need for instructional support.

In addition to design planning, instructors also drew attention to the importance of *exploiting structural elements* of the course design as a means of establishing a sense of their teaching presence. While some of these elements—course schedules, basic visual and Web designs—are displayed generically for students as part of the UXSB course template and cannot be personalized or adapted to reflect the instructor’s presence, a review of each instructor’s course site revealed that instructors manipulated other structural design elements—types and timing of instruction, group discussions, practice exercises and assignments; level and types of interactivity; navigation through course materials—to establish the level and type of presence

online that they perceived would best “ensure that people proceed down a certain process of inquiry that leads them towards education.”

Instructors also identified *the choice of appropriate technologies and activities* to be a related and significant factor in establishing a level of presence suited to their pedagogical and course designs. Thus, the instructor who based course design on the live classroom metaphor, for instance, included multiple interactive exercises and opportunities for interaction and instructional assistance from students in the course as well as detailed, frequent video and written instructions for walking students through their content and learning activities in a “step-by-step process where you learn one thing, you do the exercises, you learn another thing, you do the exercises...you learn content and do an exercise”—much like students would do in a classroom. Similarly, the instructor whose course design was patterned on the journey metaphor took a “low-tech” approach and listed instructions for students seeking guidance on their journey to “phone and discuss with [the instructor] what they’re doing” using a more personal medium such as the telephone.

Of course, instructors do not design course and build teaching presence autonomously in a large, standardized environment such as the UXSB, and interviewees identified some *obstacles to presence-building* that they had encountered in their experiences. One professor expressed concerns about the lack of personalizability inherent in standardized University X course design models, calling them “Walmart models...where I’d better be conscious of mass responses and mass effects” and another questioned the growing tendency towards treating students as “consumers” who require nothing more than a simple, limited education designed according to the aforementioned “Walmart model.” A bigger issue for interviewees, though,

was the obstruction to personalizing designs caused by the bureaucratized course design and development process at University X. The length of time taken to produce an online course after its creation by the course author/instructor, as well as the number of processes and hands (e.g., instructional designer, editors, web developer) through which the original course passes during development and online production mean that, as one instructor described it, “five, six, seven people have already put their input into it and it is no longer just yours....at the end of it, it’s a year and the person who wrote it has no recollection of what they wrote anymore and no buy-in with it.” That is, the instructor might not feel the same sense of presence in their course.

Enhance interaction to foster presence

Another main theme that emerged from interviews with instructors related to the importance that they attached to interaction in fostering a sense of their teaching presence. One technique for conveying a sense of presence that might encourage students to interact more easily with instructors was to *add personality to course materials*. Two of the instructors added personalized videos in their course introductions to welcome students to their respective courses, and another described incorporating humanizing elements such as “humour and imagination” (and included a very humorous anecdote about a relevant personal experience in an assignment instructions video) into course materials to imbue them with personality and presence. In a related sub-theme, instructors identified strategies for *increasing the immediacy* that they conveyed to students in an effort to enhance interaction and students’ sense of their presence. One interviewee described several techniques for improving response and feedback rates and times—automated interactive exercises that generate instant marks for quizzes, whiteboards and other synchronous communications technologies that speed up response

times—and reasoned that a two-day response to a student’s problem in today’s digital world “projects the image that we don’t really care about them.” Early and frequent contact with students via introductory letters, progress calls, or online, real-time Elluminate meetings were also described by instructors as techniques they had used to project a stronger sense of their immediacy and imminent presence, or as one interviewee said, to “[let] students know that we’re here and we can help you.”

Another important aspect in increasing interaction with students and enhancing their sense of the instructor’s presence identified by interviewees was to *involve students in the course development process*. One interviewee used a synchronous whiteboarding activity in which students created and uploaded video presentations directly to the course site for other students, for instance, while another encouraged students to participate in an “Easter Egg hunt” for early-version glitches and oddities in the design elements and learning activities, which were incorporated later as “fixes” in the course. This instructor described the feedback process as being interactive; feedback from students “informs [my] teaching pedagogy for the next revision” of the course, while responses to their feedback informed students that their instructor was present and listening to their input, “and they seemed to appreciate...the interaction.”

However, interviewees also highlighted several *constraints to enhancing interaction* that had adversely affected their efforts to enhance the teaching presence they were projecting. Some of these constraints were institutional, arising from the UXSB course development process or learning environment. One interviewee, for example, pointed to the limitations of common UXSB asynchronous course technology in capturing the level of interactivity and dynamics present in face-to-face teaching: “the way we present course materials...the environment we

work in, it's online, so that does not jive very well with teaching, actual teaching. In order to do teaching you have to go back to more traditional ways of interaction like videoconferencing or Elluminate." For this interviewee, "actual" teaching involves a real-time, face-to-face interaction that is difficult to replicate in the asynchronous, text-based UXSB learning environment. Course revision processes in UXSB, which are often resource- and time-consuming, were also identified as a potential obstacle to presence-building. Student-suggested course fixes, if implemented quickly, can foster a sense of teaching or institutional presence in students, but at least one interviewee agreed that the opposite effect could be incurred by a slow response: "if you can make adjustments fairly quickly it creates a real sense that you're there and that you're present, but when it takes six months to get changes implemented it makes [students] wonder if we're not sitting in an ivory tower."

Providing expert leadership

Related to the theme of enhancing presence through increased interaction, a third and related main theme that emerged from interviews with instructors centered on their provision of expert knowledge and leadership—what Garrison et al. (2000) refer to as direct instruction—as a means of asserting their teaching presence. One aspect of direct instruction that all three interviewees flagged as crucial was finding ways to *personalize the instruction* provided to students. They described using strategies such as having students submit assignments in PDF format so that markers could insert individualized comments and notes directly into them ("being able to write on it is a personal thing, and that's what I'm trying to encourage") or creating assessment activities in a self-study course that required students to discuss their progress with their instructor before moving on to the next stage of their course ("they've got to

show me where their research taught them things or gave them a perspective that they never thought of before”) for conveying the impression to students that a “real” person was teaching their online course and personally monitoring their learning progress.

Similarly, interviewees described methods for *increasing direct instruction and personal contact* with their students in order to enhance the teaching presence they project. Two of the interviewees had experimented with using synchronous, video-based, interactive technologies such as VoiceThread and Elluminate to meet with students in real-time online, and another had tried designating scheduled online “office hours,” during which students could be assured direct expert assistance from their instructor.

The most important strategy outlined by instructors for providing leadership to students and asserting their teaching presence, though, was *providing expert knowledge* to help students “scaffold” the knowledge acquired in class to their real lives. The interviewee teaching the senior-level course described providing expert knowledge by conducting incremental “meta-analyses” with students, which helped them see how the knowledge they were gaining in class was affecting their attitudes about other aspects of their lives: “By the time they turn in their final paper I expect [it] to be quite far removed from their original proposal...I expect [them] to be a little bit changed.” Another instructor encouraged knowledge scaffolding by designing learning materials that simulate real-life situations and dynamics—that “link students to working conditions [and] immerse them into a situation...It’s simulating real-life situations and having a bit of fun doing it.”

One noticeable obstacle to enhancing direct instruction and expert leadership that was identified by interviewees and also appeared as a theme in UXSB historical documents related

to the student service model in place at UXSB. Student calls for assistance or expert instruction are routed through the UXSB Call Centre, where student service experts sort them and either provide an immediate response (non-academic queries) or forward them to the course instructor for resolution (academic or assessment-related queries). Call Centre staff also make the all-important “first call” to welcome students to the course. Several instructors who provided comments in the *UXSB Student Services Committee* report voiced “concerns about the Call Centre model’s negative impact on the student-academic relationship; however, these concerns [were] not universally held” (University X School of Business, 2009, p. 4). Similar findings appeared in interviews with instructors. One instructor felt that more personal contact with students, particularly at the first contact stage when they are just beginning their online course, was critical in establishing teaching presence; this interviewee stated that “the first interaction between me and them is the most important because that sets the tone for future interactions.” Another of the interviewees listed instructions in the course site instructing students to contact him directly via phone or e-mail early in the course to establish contact and maintained this personal contact with students throughout the course—a strategy also employed by other instructors, according to the *UXSB Student Services Committee* report.

Ways to satisfaction

The final theme described by interviewees related to the connection they felt between their sense of teaching presence and their satisfaction with their effectiveness as online teachers. Two different aspects to the connection emerged, each producing different impacts on the satisfaction felt by interviewees: Two of the instructors associated satisfaction with generating a teaching presence that contributed to *helping students achieve their learning outcomes* and

build knowledge. Their perspectives on how well students had achieved those learning objectives, not surprisingly, were based on their respective pedagogical objectives and models. The senior-level course instructor whose aim was to guide students along their journey of inquiry to effect change in their ways of looking at their jobs or lives, for instance, described the satisfaction derived from discovering how effectively he had performed his role as a guide as follows: "An RCMP inspector who came up to me and congratulated me on graduation day for forcing him to change his mind about certain things [was] one of my most gratifying things, because yes, I did." Similarly, the instructor whose teaching model was based on providing students with a movie-like "kit" that contained everything they needed to learn and who wanted to "motivate students to engage in a scenario, to use their imaginations to relate to what they already know," accordingly felt most satisfied when students synthesized their real-life experiences with their simulated ones; for this interviewee, "the *best* courses [were] the ones where we've done silly things with things that people know." Both these instructors seemed to base their sense of satisfaction on having created an effective presence for helping students to learn.

For the other instructor, though, satisfaction was dependent on the richness of the LMS communication media for providing a *level of interaction* that would allow allow the instructor to perceive when students were learning something; this interviewee based it on "being able to interact and see people's expressions...to sense the light bulbs going on." Consequently, this instructor felt some dissatisfaction with the levels of interaction and presence conveyed by tools in the LMS template, but this dissatisfaction was tempered by an acknowledgement that "in this environment I have to be creative about [finding ways to interact] that give satisfaction."

Discussion and Conclusions

Discussion

The purpose of this study is to explore the ways in which UXSB instructors build a sense of teaching presence in their learning environment and to understand how teaching presence impacts their ability to help students learn and gain a sense of satisfaction from doing so. By definition, conclusions related to this exploration that are generated by grounded theory approach should be grounded in the phenomenon or situation being researched, but Strauss & Corbin (1990) also sanction the use of prior theory or concepts, such as those derived from the literature, for framing grounded theory research as they provide the analyst with a degree of practicality and analytical parsimony. Accordingly, the Community of Inquiry model (Garrison et al., 2000) is used as an interpretive framework for considering the significance of the themes and analysis results in describing the practices, perceptions and experiences of UXSB instructors. Although the model analyzes the relationship between students, instructors and learners in a specific, well-defined computer conferencing environment, the principles and strategies that it describes for creating and managing teaching presence can also be “extended to other components of the course....Teaching presence mediates all of these components” (Anderson et al., 2001, p. 5).

One of the first things evident in the interview data is the importance that instructors attach to instructional design for establishing and managing their teaching presence. At first glance, this does not perhaps seem surprising. UXSB instructors are formally responsible for

writing and selecting the design of course content and learning materials as part of their normal duties as course authors and academics at University X. Moreover, online course development and production processes at UXSB (and throughout University X) reflect systems-based models in which design professionals (instructional designers, editors, multimedia specialists) modify and prepare course materials for web delivery and develop design templates to ensure that all courses meet University X standards for quality and bear a distinctive University X look and feel. They have considerable input into course creation and focus considerable attention on the design of each course that gets delivered in the UXSB learning environment. The “package” of various web-accessible course materials that gets delivered to students is carefully designed and structured to contain everything they are likely to need—including instructions for using each component in order to minimize the necessity for tutorial support—to complete their course of study.

As defined in the Community of Inquiry framework, instructional design and organization comprise “the planning and design of the structure, process, interaction and evaluation aspects of the online course” (Garrison & Arbaugh, 2007, p. 163) and the authors identify “instructional design and how we use technology to create a learning environment [as] paramount in achieving quality learning outcomes” (Garrison et al, 2000, p. 92). Instructional design is an especially powerful tool for instructors in establishing their teaching presence in the UXSB online environment. By selecting course designs and manipulating various structural elements of the course, they create learning environments that embody their chosen pedagogical models and objectives, and they use multimedia technology and interactive tools and activities to assert their presence and to define their role in the learning process for

students. Indeed, in their online environment, where the content of the course provides the only assured contact with students, the presence instructors project in the design is their main means of controlling students' interaction with the learning materials and progression through the course, as illustrated in one instructor's comment: "[I lead students] through a controlled progression. I'm not going to let them invent the course. It's not just control of the content—it's the environment."

Also evident in the UXSB instructors' interview results is the central role that enhanced interaction with students plays in helping instructors build and sustain their teaching presence. The techniques described by instructors for increasing interaction with their students and establishing an online presence that encourages them to ask questions and explore their learning environment—personalizing course materials using video technology, personal anecdotes and humour; engaging students in course development and revisions; using synchronous and interactive technologies to reduce response times to student queries and to increase response rates—reflect principles for effective online instruction advanced by Chickering and Ehrmann (1996) and echo Anderson's (2008b) description of another critical element of teaching presence, facilitating discourse, in which "the teacher regularly...responds to student contributions and concerns, and constantly searches for ways to support understanding in the individual student, and the development of the learning community as a whole" (p. 350). By increasing the quantity and quality of their interactions with students, UXSB instructors cultivate personable and responsive learning environments in which students feel comfortable asking questions and voicing their ideas. Moreover, the enhanced sense that students have of their instructors' immediacy and intimacy possibly conveys the impression to

students that there is a “real” person monitoring or guiding their progress through their course materials who is present and available to help.

Increased interaction also lays the groundwork for providing expert leadership for students, another of the principal means by which UXSB instructors assert and sustain a sense of teaching presence. Like the instructional design and organization function that instructors perform, this aspect of their online teaching role has deep roots in traditional teaching practices—most educational systems are predicated on the idea that experts (instructors) will share their advanced knowledge of a subject with novices (learners) while teaching them how to acquire that knowledge for themselves. But intellectual and scholarly leadership—delivered through “direct instruction that makes use of the subject matter expertise of the teacher” (Anderson et al, 2001, p. 8)—plays an especially significant role in establishing an authoritative teaching presence that guides students in achieving high-order thinking skills, and in fact, many of the techniques used by instructors reflect the same intent as Anderson et al.’s proscribed practices. Interviewees describe using personalized feedback to comment on student exercises and assignments, for instance, to add personal relevance to each student’s assessments while also correcting any misconceptions they may have acquired about ideas presented in the course. Providing increased opportunities for direct contact with students, through the use of synchronous software such as Elluminate and VoiceThread or by means of regular contact hours such as the virtual “office hours” advocated by one of the interviewees, gives students regular access to instructional assistance and confidence that someone is present online to help them when necessary. All of the instructors provide expert knowledge through course content and assistance to students, and all of them include “real-life” cases or scenarios in their courses

to help students scaffold course concepts to their own experiences. In short, interviewees provide direct instruction and expert leadership that “allows students to construct the content in their own minds and personal contexts” (Anderson et al., 2001, p. 9).

In spite of some of the effective methods used by instructors for enhancing their teaching presence by manipulating the instructional design and facilitating interaction with and direct instruction for students, interviewees also identify some significant constraints on their presence-building efforts, many of them based in UXSB processes and systems. Two instructors, for instance, feel hampered in their attempts to incorporate personalized or non-standard instructional designs or tools in their courses by the UXSB’s use of standardized LMS tools and design templates—the “Walmart model.” Similar concerns emerge about loss of control over the course design process. UXSB’s centralized, systems-based course development processes, though considerably evolved, have their roots in traditional “guided didactic conversation” models. Every new course or major course revision goes into the “production queue,” where editors, instructional designers, and multimedia and web developers check the various course components for quality, usability and suitability, add interactive tools and features, and prepare the course for Web delivery to students. At least one instructor describes feeling a loss of ownership of their course, and consequently, a loss of presence in it as a result of the number of “hands” in the course design process and the length of time required to prepare it for delivery. The UXSB is not alone in struggling with issues of control over course design and production and ensuring that a course author’s “presence” remains intact; the State University of New York, a giant consortium of distance and mixed mode universities and colleges that also employs a centralized course development model, identifies as its first two principles in

providing support to online faculty “[First], faculty-driven course design or pedagogy must not be imposed by the course management application or the instructional designer; [and second], faculty must develop the course themselves” (Fredericksen et al, 2000, p. 13).

UXSB processes and systems also constrain some instructors’ ability to foster a sense of their teaching presence through closer interaction with their students. Instructors voice concerns about the length of time required to incorporate course revisions and student-suggested changes through the complex course development process in UXSB, for instance, and worry about the negative effects of these delays on their attempts to enhance the sense of immediacy they project to students. They believe that students will interpret a lag in incorporating these suggested revisions—which they attribute to their inability to make immediate changes to online course materials and their limited means of informing students about required revisions or changes—as a lack of teacher’s presence. An even greater impediment to interaction and to providing direct instruction to students is represented by the Call Centre student support model used in UXSB. Two instructors express frustration at the “intermediary” function that the Call Centre performs; one of them has designed his course to circumvent the Call Centre system by arranging direct telephone and e-mail contact with students, and the other has plans to assume the “first student contact” function currently being performed by Call Centre staff and to institute set “office hours” during which students can contact their instructor directly with problems and questions. Comments in UXSB historical documents add credence to instructors’ concerns; the Call Centre model is identified as an impediment to student-instructor interaction by several faculty members (University X School of Business, 2009a), and in the most recently published comparison of student satisfaction with

tutorial support and “presence,” students give consistently more favourable ratings to direct tutorial instructional models than to the Call Centre model (University X, 2006).

The constraints felt by instructors may in part explain the noticeable lack of discussion in interviews about techniques for asserting their teaching presence by facilitating student-student interaction or building learning communities. In fact, in comparing the techniques described in the Community of Inquiry framework for developing teaching presence to the processes followed by UXSB instructors, this is the major point of divergence between the Community of Inquiry framework and the models described by instructors. While there is a definite initiative on the part of all instructors (driven partly by LMS template design) towards providing more learner-centered activities and tools for students—the personalized feedback, self-paced activities and exercises, and learner-structured course design described by interviewees—two of the instructors interviewed base the design and structure of their courses on conventional didactic pedagogical principles. Only one interviewee, the “journey guide,” espouses a clearly constructivist philosophy that sees learning and knowledge as “something that you construct...in a social environment”; however, his course is a senior-level, self-study reading course that contains no collaborative activities.

Several factors contribute to UXSB instructors’ reluctance to adopt community or social learning environments or to focus on the moderating element of teaching presence. In part, traditional distance education principles influence teaching models, so a course design aimed at providing students with a tidy “kit” that contains all the online tools and instruction they will need to study alone or with a highly directive and feedback-oriented replica for a classroom experience would seem to be a logical choice for instructors. Moreover, University X, founded

on Holmberg's framework of "guided didactic conversation" and its "conviction that the only important thing in education is learning by individual students" (Keegan, 1998, p. 2) has built its reputation on ensuring students can study "anytime, anywhere" so there is institutional resistance to adopting social learning activities that may interfere with individuals' ability to study alone, and a widely held assumption that University X students do not support social learning. (This is consistent with Anderson's (2008a) assertion that "the major motivation for enrolment in distance education is not physical access per se, but the temporal freedom that allows students to move through a course of studies at a time and pace of their choice" (p. 52).) Interviewees base their decision to use more traditional pedagogical models in part on the level and volume of content being presented and the associated level of knowledge demonstrated by their students; two teach introductory courses that require "a lot of handholding" of students, which they feel is best accomplished using a less social framework. Each instructor selects a pedagogical model that they feel is most appropriate for the subject and students being taught, then manipulates each of the elements of teaching presence—instructional design, facilitation of discourse, or direct instruction—in order to fashion the type and level of presence commensurate with their model.

How well they succeed at attaining a teaching presence that is effective in helping students meet their learning goals seems to be the most significant contributing factor to instructors' feelings of personal reward and satisfaction. Regardless of the pedagogical model applied, each of the instructors expresses satisfaction at seeing the model they have designed and the role they have played effectively produce their intended results, a finding consistent with Fredericksen et al. (2000), who report that faculty "who felt that their on-line students did

better also felt significantly more satisfied with on-line teaching” (p. 15). Thus, the instructor whose aim is to guide students along a journey of inquiry and self-realization experiences “one of [my] most gratifying moments” (quote from instructor) when a student thanks the instructor for changing the way the student thinks, and the instructor whose aim is to direct a movie-like environment in which students immerse themselves completely describes “the best course [I] ever taught” (quote from instructor) as one in which students used cameras and filmed each other making ads while the instructor provided guidance and direction from behind the scenes. The key, of course, lies in being able to “sense” or “see” the changes wrought in students as they gain new knowledge, as pointed out by one interviewee. This is a problem for all instructors, whose “indications of success in imparting knowledge may be as subtle as a twinkle in a student’s eye or the dawning of awareness that passes across a student’s face (Pool, 1996, p. 1), but it is an even more significant challenge for online instructors, who cannot see the “twinkle” or physically detect the “dawning of awareness” in students. Synchronous audio and video tools or social networking software may provide a better means for sensing student learning, but the answer may also lie in finding creative methods of connecting with students to sense their learning—such as the instructor who attended the University X graduation ceremony and talked “off-line” to his student to discover how his teaching presence had accomplished its goal.

Conclusions

The Community of Inquiry learning model provides a useful framework for examining the strategies and techniques used by UXSB instructors to create and effectively manage their online teaching presence. The same elements of online teaching that Anderson et al. (2001) identify as central in establishing a teaching presence that helps students take maximum advantage of their online learning environment are reflected in UXSB instructors' practices. By manipulating the instructional design and structural elements of their courses, enhancing their interactions with students, and finding innovative ways of personalizing and increasing the direct instruction and expert leadership they provide, the UXSB instructors help to create a rich learning environment in which students are comfortable asking questions and looking for information because they are confident in their sense of the instructor's presence and guidance. Evidence that lends support to the effectiveness of instructors' efforts is found in the 85%-plus satisfaction ratings from students for current course delivery models (University X School of Business, 2009b).

Interestingly, however, UXSB instructors' practices diverge from the Community of Inquiry model by adopting more independent than collaborative pedagogical goals. While there is some merit to instructor and institutional arguments against using learning community models for all subjects and types of students, the literature provides strong evidence for the merits of collaborative learning (Ally, 2008; Fahy, 2008; Garrison et al., 2000; Gorham & Zakahi, 1990; Gunawardena, 1995; Richardson & Swan, 2003), and UXSB would be well-served by exploring the potential for using more learning community models and ensuring that resources and encouragement are directed towards efforts at incorporating them in online course designs.

Introductory-level courses, for instance, in which instructors generally focus on transmitting information and teaching basic skills to students, could provide a fertile environment for testing course designs that facilitate greater student interaction and peer-assisted learning and that encourage students to assume a greater degree of responsibility for their own learning. In addition, all faculty members would benefit from faculty learning communities dedicated to sharing and documenting promising practices and ideas for managing and exploiting the various aspects of teaching presence to improve instructional effectiveness.

Many of the challenges that face instructors as they search for ways to interact with students and establish their presence in the online learning environment can be addressed by implementing process and role changes within UXSB. Course development processes and production roles that were designed for print production and early generations of online course delivery should be deconstructed and examined to find ways to ensure that instructors retain “ownership” of their course in each step of the process and feel “present” in the finished product. UXSB policies that require all calls from students to be routed through the Call Centre and not directly to instructors or academic experts also represent a potential obstacle to instructors’ presence-building efforts, and as noted, some instructors have already been circumventing this process by corresponding directly with students via e-mail or telephone. In order to bolster instructors’ efforts to build an effective teaching presence through interaction and direct instruction, these policies might also be examined and possibly revised. Both of these issues have been “flagged” for future discussion in the University X School of Business *Student Support Committee* report (2009a), so there is every likelihood that creative solutions to these challenges can be found in years to come. Removing some of these constraints and making it

easier for instructors to realize their pedagogical goals should, in turn, have a positive impact on instructor satisfaction. The reward, as summarized by one of the interviewees, will be worth the effort: “When we find a way to [really] teach effectively online, this university will be *the* university to go to for online education. We have to keep searching for that.”

Suggestions for Further Research

This study focused on collecting and analyzing instructors’ perceptions of their experiences with creating an online teaching presence and using it to enhance student learning. Research into student perspectives on the effectiveness of instructors’ efforts would provide further validation for the findings in the study. Also, further study on the role that teaching presence, or the elements that comprise it, play in supporting other pedagogical models should be considered. Finally, the UXSB and all other departments are currently changing their course delivery platform to Moodle. This should provide some innovative synergies as the conversion moves forward, and it might prove useful to conduct a follow-up study to determine the impact of the new LMS technology and environment on presence-building processes for UXSB faculty and on students’ ability to learn in their virtual classroom.

Researcher Background

Vincent Ambrock is currently employed as an Editor and Instructional Designer at University X. Since graduating from the University of Alberta with a Bachelor's degree in English Literature (Honours), he has worked as a professional editor, writer and visual designer for such diverse publications and organizations as *The Canadian Encyclopedia*, *Alberta Report*, Northwestern Utilities Limited (ATCO) and Spar Aerospace Limited. His research interests centre on educational technology and finding better ways to help students and teachers communicate with each other and share knowledge.

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Appendix A

UXSB Learning Management Software

This table describes standard course development and collaboration software and tools available to instructors in the UXSB learning environment. Instructors are constantly encouraged to find, test and use new software for specific applications:

System	Function	Features/Applications Supported
Lotus Notes	Learning Management System (LMS)	<ul style="list-style-type: none"> • multimedia course/content preparation and Web delivery • content management/document storage • portal to UX website and services • e-mail • discussion board • team/group rooms • instant messaging • shared calendaring and workflow • assignment/exam marking
GWI	Customer Relationship Management (CRM)	<ul style="list-style-type: none"> • student problem/incident tracking • e-mail • knowledge management bases • access to administrative resources
Notes-supported third-party applications	Synchronous audio/video Assessment Web browsers	<ul style="list-style-type: none"> • Elluminate • VoiceThread • Lyryx • Internet Explorer • Mozilla • Firefox • Opera
Microsoft Office	Office productivity	<ul style="list-style-type: none"> • Word • Excel • PowerPoint • Access • Outlook

Note: At time of writing, UXSB is moving towards integrating its course development systems more closely with University X systems by converting course development to the Moodle LMS; this may entail small changes in the degree of functionality of some applications, but Moodle offers the same or improved features as Lotus Notes.

Appendix B

UXSB Course Development Workflow*

*Adapted from workflow description provided by UXSB Manager, Course Production.

Design and Development (course materials created and prepared for production)			
Steps	Who?	Average Timelines	Action/Outcome
Preliminary Course Proposal	Course coordinator Centre chair Instructional Media Coordinator (IMC)		Course coordinator prepares a brief report about the proposed course and submits it to IMC. The Pre-Phase 3 Report is circulated to Academic Centres and approved by Centre Chair.
Course coordinator finds Subject Matter Expert (SME) to work on new course or revision, or course coordinator writes the new course or revision as part of his/her workload.	Course coordinator SME		Course coordinator informs IMC and a date for a team meeting is determined.
Initial Team Meeting- Standard list of items discussed (checklist). Academic staff informed of technology available.	Centre chair Course coordinator SME Editor Instructional designer Multimedia designer IMC For major revisions, include Undergraduate Student Advisor (USA) Course assistant		*Revision material sent: course evaluations, GWI summaries, current course files, assignments and exams. *Online course access given to SME. *Link to <i>Course Development Guide</i> given to course author. *Date of next meeting determined. *Summary of meeting placed in tracker.

Evaluate teaching and course materials.	Course coordinator Academic experts (AE)	1 day	The course coordinator consults with the AEs to determine whether the materials have been effective and what changes may be required. The course coordinator completes the Phase 6 form and returns it to IMC.
Phase 3 or Phase 7 A detailed course plan is developed in either a Phase 3 form (new courses) or a Phase 7 form (major revisions).	Course coordinator and/or SME	3 - 6 months	The phase form is circulated for discussion among the Academic Centres and a number of other UX departments. Feedback is taken into consideration and may be incorporated into course. An external review could take place if the Course coordinator desires.
VPA approval to move to Phase 4 (for Phase 3 only)	IMC		Approval is recorded in the Production Tracker.
Phase 4 Course materials are prepared in accordance with the course specifications	Centre chair Course coordinator		The chair and/or course coordinator set up the contract. The contract approved by chair and course coordinator and cc'd to IMC for informational purposes.
Course author works on Phase 4.		3 - 6 months	Course materials are prepared/written.
First 2-3 lessons and assignment submitted	Centre chair Course coordinator Author Instructional Designer	1 week	Learning Design review takes place.
Author continues to write course, incorporating feedback from LD review.	Author		
Team meeting to discuss progress, concerns, and issues. (Did the author make changes as per the ID review.)	Centre chair Course coordinator SME Instructional designer IMC		Summary of meeting placed in tracker.

Status meeting as required	Centre chair Course Coordinator SME Instructional designer IMC		Summary of meeting placed in tracker.
SME submits Phase 4 course files and checklist to course coordinator for approval.	Centre chair Course coordinator SME IMC		Chair and course coordinator verify if contract obligations have been fulfilled. If Course Coordinator desires, AEs are given an opportunity to review course to offer input before the materials go to the production team. AEs time is recorded on the regular time sheet for this service.
Production (Course enters production process)			
The SME or course coordinator submits all of the course materials (Phase 4) to IMC.	Course coordinator/SME IMC	1 day	Phase 4 checklist is reviewed to ensure everything has been submitted.
Course is assigned to Managing Editor.		1 week	Senior Editor reviews course files. Course may be returned to author for further work if content is lacking in any area or if pieces are missing (e.g., references, copies of quoted material, etc.)
Course is added to Production Queue.	IMC Editor		Editor is assigned.
Course is edited. Multimedia items are built.	Editor Multimedia designer	2 -4 months	Editing and multimedia work begin. Copyright requested. Textbooks ordered. Exams formatted and put into template.
Course is ready for layout.	Multimedia course production specialist (MCPS)	2 weeks	Course is built in online template.

Editor reviews online layout; proofreads all content.	Editor	1 week	Changes are made as required.
Final Author Review (FAR)	Course coordinator and/or SME	1 week	FAR is completed as per checklist.
Editing changes based on FAR.	Editor	1 week	
Final signoff steps	SME Course coordinator Editor Copyright office		Course is ready to be opened.
IMC requests to have course opened.	Materials Management Dept (course package) Registry Department confirms exams and sets up course in Banner	1 week	Course must be signed off by the 1st of the month so all departments can complete tasks prior to the 10th in order for the course to open for students the following month. Course is opened. All course packages must be used up or disposed before the revision is opened.
Syllabus is updated	MCPS	1 day	Syllabus information is updated at UX Web site.
Marking scheme is created	Course assistant	1 day	Course marking scheme is signed off by coordinator and new marking scheme is entered into Newton.
Phase 5 begins			The course opens and enters Phase 5, course delivery and academic experting.

Course Delivery (Course open and delivered to students)

Appendix C

Information Handout and *Informed Consent* Form

As part of a Masters of Arts in Communications and Technology program at the University of Alberta, I am conducting a research project in the School of Business. This message provides a brief overview of my research project, and invites you to participate in this study as an interview respondent.

Purpose of Project

The explosive growth of online communications and computing technology has created a host of new possibilities for interacting, accessing and sharing information. This, in turn, has transformed the roles that students, faculty/instructors, and technology play in the distance learning process and highlighted the critical importance of teaching presence as a factor in students' learning and satisfaction with their learning experience. The School of Business has taken the technological leap into online learning, building a learning environment aimed at facilitating interaction between students, faculty/instructors and materials, and at maximizing students' learning and satisfaction with their learning experience. The purpose of this project is to explore how School of Business faculty/instructors make use of various tools and techniques to create a sense of teaching presence in the School of Business learning environment, and at discovering which aspects of the learning environment they find most useful for managing teaching presence, and thus, for building connections with students and helping them to learn.

This research project is not funded. It comprises a requirement towards completion of my Masters degree.

Methodology and Participant Time Commitment

As part of my project, I am collecting data from faculty interviews, historical documents and course site observations. Your participation in the project would involve meeting with me in person (preferably) or by teleconference for an interview for no longer than 60 minutes. The interview will consist of open-ended questions asking you to describe techniques and tools you typically use to communicate and interact with students or to get students interacting with the course materials or each other, and to provide your perceptions about the strengths and weaknesses of the School of Business learning management system in helping you to project a sense of teaching presence to your students. You will have the opportunity to ask any questions, and of course, to decline answering any questions you wish.

The interview will be complemented by observations of features and activities in courses that you teach. If necessary, I would arrange a brief follow-up interview (no more than 20-30 minutes) or contact you via e-mail to answer any questions arising out the interview and subsequent data collection.

Confidentiality and Participant Risks

Your identity will be kept anonymous and in strict confidence. Quotations from interviews may be used in reports, articles, and presentations in scholarly and professional venues, but your name will not be associated with any quotation and all personal identifiable information will be removed from quotations.

There are no known risks associated with your involvement in this project, and no remuneration is provided. Should you participate, your employment relationship with the University and your comments will not be released to the University at any time.

All data collected in the course of this project will be stored in a secure location for a maximum of 5 years (September 2014) and then destroyed.

Withdrawal from Project

There are no penalties or consequences for withdrawing from this project (no questions will be asked about your reasons for withdrawing). You may withdraw from the project any time up until two weeks after you have reviewed the transcript(s) of your interview and any follow-up interviews, and any data collected from you will be withdrawn and destroyed (hard copy interview transcripts) or deleted (digital audio files).

Ethics Approval

The plan for this study has been reviewed for adherence to ethical guidelines and approved by the Faculties of Extension and Augustana Research Ethics Board (EEA REB) at the University of Alberta. Questions regarding participant rights and ethical conduct of research should be addressed to the Chair of the EEA REB at (780) 493-3751.

The plan for this study has also been reviewed for adherence to ethical guidelines and approved by the Research Ethics Board at University X (University X REB). Questions regarding University X REB approval should be addressed to appropriate party at University X.

Any Questions?

If you have any questions about this research study and your participation in it, now or in the future, feel free to contact me at the following locations or numbers:

Investigator/Researcher

Vincent Ambrock

Master of Arts Communications and Technology Student

University of Alberta

Project Supervisor

Dr. Stanley Varnhagen

University of Alberta Faculty of Extension

e-mail: Stanley.Varnhagen@ualberta.ca

Once you have read and understood the contents of this information letter, discussed any questions about it with the researcher, and agreed to participate in the project, please sign the Participant Informed Consent form on the following page and return it to the researcher.

Vincent Ambrock

Master of Arts Communications and Technology Student

University of Alberta

Participant Informed Consent

I, _____, am a faculty member at University X. As a volunteer participant, I agree to participate in this research project. I understand that my responses to questions and comments of this interview will be recorded for the purpose of data collection by the researcher. I also understand that the researcher may access the website(s) of courses that I instruct to observe activities and collect course-related data in conjunction with this interview.

I acknowledge that the research procedures have been explained to me, and that any questions I have asked have been answered to my satisfaction. I know that I may contact the researcher listed on this form if I have further questions now or in the future.

I have been assured that my participation in this study poses no known risks or benefits to me, and I understand that I am free to withdraw from the study at any time without having to provide a reason. I also understand that all data collected will be kept in a secure location for no more the five years and then destroyed. Any personal records relating to this study will be kept anonymous and all data and information collected and used in this research will be kept strictly confidential.

I have been informed that the plan for this study has been reviewed for its adherence to ethical guidelines and approved by the University X Research Ethics Board and the Faculties of Education, Extension and Augustana Research Ethics Board (EEA REB) at the University of Alberta. For questions regarding participant rights and ethical conduct of research, I may contact the Chair of the EEA REB at (780) 492-3751.

Participant Name (please print)

Participant Signature

Investigator/Researcher Name (please print)

Investigator/Researcher Signature

Date: _____

Date: _____

Appendix D

Interview Guide

Step 1: Pre-interview checklist

- Explain project purpose and methodology.
- Outline participant requirements: time required/responsibilities.
- Describe process for coding, storage and destruction of data.
- Outline confidentiality protection and risks/benefits to participant.
- Offer right to withdraw or refuse to participate.
- Explain interview process:
 - unstructured, conversational discussion based on a few guiding questions
 - some preliminary descriptive information needed
 - informed consent form signed and returned
- Describe disposition of final report, offer to provide a copy.
- Obtain consent to audiotape interview.
- Provide interviewee with copy of information letter and informed consent.
- Ask for questions or comments.

Step 2: Facesheet/descriptive information

Interview no. _____

Date and time of interview: _____

Location of interview: _____

Summary of teaching experience (specify mode) _____

Other observations: _____

Step 3: Definition of terms used in interview

- Teaching presence: The design, facilitation and direction of cognitive and social processes for the purpose of realizing personally meaningful and educationally worthwhile learning outcomes.
- Interaction: A term often used to describe the main advantage of computer mediated communication; most online distance learning environments are designed to support three types of learner-based interaction – learner-content, learner-learner, and learner-instructor.
- Learning environment: Computer-based learning environments that are that are relatively open systems allowing interactions and encounters with other participants and providing access to a wide array of resources.

Step 4: Interview guiding questions and potential probes

	<i>Guiding Question</i>	<i>Probes</i>
I.	What is your role as an instructor (lecturer, guide, facilitator, etc.)? Do you feel your role has changed as a result of new learning technologies in the School of Business?	<ul style="list-style-type: none"> • How have your interactions with students changed? • Do you find it easier or more difficult to interact with students and to get them to interact with each other? • How do you see your role in the course development process, and [how] has it changed? • Is teaching presence important? • Do you actively manage your teaching presence? • Challenges and opportunities for building connections?
II.	How do you use tools and media in the learning environment to foster and manage presence?	<ul style="list-style-type: none"> • What tools or technology have you found useful for creating and managing teaching presence? What has been less useful? Provide examples. • What about course-based technology---are multimedia and design useful for managing teaching presence? Provide examples • Do you choose between media and tools on the basis of the presence you want to project? How do you choose? • Are there tools that might be more useful?

III.	What design or pedagogical strategies do you use to manage teaching presence?	<ul style="list-style-type: none"> • What instructional or communication designs and strategies have you found to be effective for projecting and managing teaching presence? (instructional design, feedback, discussion behaviours, etc.) • Pedagogical philosophy: does it align with learning system design? Ask about course design and assessment, multimedia for building teaching presence. • Other immediacy behaviours?
IV.	What factors do you feel affect your ability to manage teaching presence?	<ul style="list-style-type: none"> • What factors enhance or constrain faculty/instructors' ability to create a sense of teaching presence in the School of Business learning environment: technological constraints? lack of control over process, environment, course development? support issues? • What special problems or opportunities for creating teaching presence does an "unpaced" learning environment present over conventional teaching models? • Ideal world: What would you do differently to provide an environment that would let you create presence?
V.	What factors affect your sense of satisfaction with online teaching?	<ul style="list-style-type: none"> • Overall, are you satisfied with the connections you make with your students, i.e., the presence you project? your effectiveness as a teacher? • Is this effect different than you've experienced in more "traditional" distance education or classroom-based environments? • Does your sense of teaching presence affect your overall sense of satisfaction with online teaching?

Appendix E

Interview Transcripts

Interview No. 1 Interview Transcript

I = Interviewer P = Participant

I: *How do you see your role as an online educator? How has it changed?*

P: I'm going to answer in different ways, okay?

I understand what you're trying to find in terms of information, but I have had formal training in education..... As a student I produced material for a language lab so I was always in the background producing things and wanting to make my life out of that....I learned to design instructional kits, and that's still a big metaphor in my design approach because I've really worked at the introductory level—skills-based education. The approach that I use today is still inspired by creating a complete learning environment for the student who wants to learn alone. With the language lab it was designing exercises on a cassette and students would just use that and practise, with very little intervention from the teacher. We just occasionally intervened....I learned to design complete lessons for using a flip chart as a support or articles. So...I still see myself doing that—electronically. I've gone through many different media. I've worked on radio, I was a photographer, so in a sense, I don't think that any of these technologies in themselves are very revolutionary or will transform learning. I remember visiting a high school when the video-cassette came out—they got rid of the teacher and all of the courses were on video and students went through four years of that.

Surprisingly it didn't work, OK? But there have been many, many new technologies that have prompted educators to say this is it! ...I know that when the record—Alexander Graham Bell came out with the cylinder and then the record—came out they thought it would revolutionize teaching and learning, so nothing of this is new. I don't believe in transformative...in technology transforming education and yet I am very conscious that students can learn alone and the kit is my metaphor.

I: *Your course is designed that way. There is group work but you could also take each of those modules away and work on them independently and everything you need is in there. There is a consciousness that they will likely be working on their own.*

P: Yes, there is a consciousness, and that comes from having done that before with different media. What else? I've studied learning theory but most of what I do is still gut-based. When I say that, I came to these courses having understood what students had done up until then...it's by being aware of their level, aware of the conditions under which we design and teach and also seeing some problems that appeared where students didn't have examples before them and they were asked to recall and describe and it didn't get them very far, so I'm trying to push the envelope based on my assessment of what went wrong as well. Then there are other metaphors that have influenced me—not so much the Internet metaphor as much as the movie metaphor. In all of my courses I've wanted to ask students in a sense to be grounded, or, it's scenario-based so it's to involve them the way movies involve people. They give up something about belief—suspension of disbelief—that's part of it all because we're supposed to link students to the working conditions—we're supposed to in a sense. It's a pedagogical intention on my part to try to do that, so all of my courses will be either scenario- or video-based. It will be based on what people see or imagine something related to.

I: *Do you select media like that on the basis of the presence you're trying to project? You seem to be very conscious of the image you're creating.*

P: I don't want to project **my** presence; I want to project them into this world. They have to use their imagination, in a sense, to simulate reality. And I don't care if I'm master of the show. I want the content to get them. So, actually the model here is much like a movie than it is, say, the kit as well.

I want to immerse them into a situation, so whether I achieve that or not I don't know.

I: That's a whole philosophy and instructional design strategy and an instructional strategy you follow, so the technology is secondary in the process for you, correct?

P: Right. We're looking at problem resolution, we're looking at...you could cite Bruner...working with content is also theorized as being a learning tool. I just do it by gut, having assimilated a lot of these life's experiences and really it's because I am designing for the introductory or closed, skills-based, short, simple issue-based courses. I wouldn't be doing this if it were for third year or fourth year.

I: What kind of success have you had so far with following this model? Do students learn well in this environment?

P: I haven't yet confirmed the success because students haven't completed the course yet, but in the past I've taught [courses] using children's toys with much more effect than when I taught using grammar. It's simulating real-life situations and having a bit of fun doing this. All of my courses include concepts but I don't want to start there. The hard part is that I've had no material to work with that begins with the videos and moves to the concepts. Everything is concept-based and stays there. That's why it's been hard and slow to build the course.

I: Well, I think throughout the university and education in general there is an inertia associated with course development based on the old print-based models. The print-based models have been effective but they're very different than multimedia course designs.

P: Really what I've done is...my design is bottom up, so instead of starting with the concept, I first ask the students to watch this video, and that's step 1 instead of saying read these concepts or rules or skills or whatever, which is the old way of doing it, but there's little material to support that kind of activity. I spent a lot of time trying to find a video that would match a chapter and then coming up with questions that situate the student in the video first, and then go the concept and back to giving a personal opinion....I had thought about simulation and all that, but that's what I'm really doing, in a sense. But it's not using the computer to simulate, it's using the scenarios. The best course I ever taught was using fun activities and coming up with fun activities. My students used cameras to film each other making ads. I got them to walk the cat-walk and tell each other what they were wearing. But it only worked with a certain type of student; they came back semester after semester. And I've tried it with another group and they hated me, because they were expecting grammar.

I: So it's not just the institution that resists the new learning models, it's also a whole way of learning that students have been taught since they were in kindergarten.

P: Right...a learning style.

I: You follow a more constructivist philosophy, where you get students to take a hand in their own learning, and you're happy to hand over control to students, then?

P: Well, up to a certain point. You see, these students need to be led by the hand. I'd relinquish control in third or fourth year.

I: Is there a difference as students progress?

P: I'd like to design a third-year course someday where I get students to research more, but these courses, there are so many skills, so many rules, so many figures that they have to go through that it is really very controlled. It's a controlled progression. I'm not going to let them invent the course. I had the same issue with learning objects. It's not just the control of the content—it's the environment, so [when] I tried to design a course using learning objects and it scared me, because those first-year and second-year students would not put up with an unpredictable environment.

I: I could see where that might be difficult. A graduate student will not need the same type of direction.

P: Graduate studies are issue-based discussions, not skills they have to apply, and that's the difference. You can choose 10 different articles that are very different in their writing styles. One could be from a research paper, another from *Newsweek*, it wouldn't much matter. But you cannot introduce different learning activities in every lesson because it would be so unpredictable you will lose your students. They would drop out. Unless you're designing a very controlled environment

but giving students a certain kind of immersion into the world that is creative and imaginative. That's where they can participate, but I'm actually holding them very tightly because I'm not allowing them to evaluate each other's work or to come up with comments about each other.

I: Is it possible to do that with the technology?

P: Yes, we could have peer review, we could have, well...but we're dealing with such high numbers, that's my fear. I'm introducing [synchronous learning technologies]; both courses teach eight lessons of basics, then students use those skills. So I'm moving there, but I still don't know whether they will comment on each other—that might come later. It's still tightly controlled.

I: Has there been much feedback from students about their own comfort level with using technology? What impact does this have?

P: ... I've only gone on gut feeling, no science. I purposely design these courses for a younger audience, because I've taught multimedia before, and in a college situation I realized that they were comfortable with the technology but not with the learning experience. Really, I gave up on giving them handouts the night before, either books or articles or anything; they really worked on the computer, chunk by chunk and that's what I've done for my students. I've chunked their learning experience into little bits and morsels. I cater to the lowest common denominator...not technologically, but in terms of learning.

I figured out that 1/3 of my communications students were illiterate, 2/3 did not know how to learn. So they were handicapped by the fact that they had no learning backbone. They went into the field of communication because they could not write; they were there for the image, they were there for the interaction, for the interactive design, for the tips and tricks. So here I'm taking no chance. I'm linking the book and my lessons and assignments very, very tightly.

I: And the videos, too?

P: Right. I've introduced icons for using different platforms like books. But the technology is just part of the learning, an interior environment. There's an exterior dimension but it's all interiorized. My fear is how it's going to play out because it's a bit more complicated with [all the materials]. It's the interiorization of all that I aim to achieve. As long as students can do it nicely, seamlessly, that's fine. If they can't, then I've got a problem. There are issues now—the screen size—I never thought about. On both of these courses it's a small screen and you have to look at nonverbal cues, but the more I worked with it the more I forgot about the size of the screens.

I: That has a huge impact, though. The technology is not divorced from the pedagogy.

P: I can see that communication can be as much of a barrier as it breaks down barriers, and it does build up new barriers. And I'm at a stage in my life where I've seen so much I can take my distance from technology—take it or leave it, that is.

So...you can see that I'm using a life's experience but also gut feeling to guide me, knowing my students and what we've done here, knowing what my predecessor has done, and then trying to push the envelope in terms of...I mean I don't always theorize what I do, but I know that our university has been talking about bringing our courses to, especially in our faculty, bringing them to the workplace somehow. There are many different options I threw out. I could have asked my students to observe a company and this would be a much more personal kind of learning. I just don't believe that at year 1 or year 2 that they're ready for that. I'll do it in year 3...At that level think you can do it. I just know having taught grammar and others, it's all about little bits and pieces and taking them by the hand from A to B to C. Otherwise, the whole experience crumbles.

I: Do you feel as though the UXSB learning environment has placed any particular constraints on your ability to connect to your students? Is there a difference between teaching here and teaching face-to-face, for instance?

P: I can tell you that I am not a good face-to-face teacher in that I am too sensitive to students' responses and displeasure. I'm basically a shy person, and I've always relished being in the background as a producer. So what I'm doing now is my favourite approach to teaching, because that's what I've done since it was in the language lab. I've always been producing tapes, or whatever, you name it. I was happy behind a radio microphone. I loved it.

I: So you are comfortable with managing your sense of presence in a multimedia environment?

P: You put me in a studio with a camera and a mike and I love it. I've done this for years, and I like it...outlining learning objectives, coming up with a strategy a creative strategy-- there is a structure to the whole thing, and a creative angle. Unfortunately, my vision is usually too ambitious, and I hate the details...So I really enjoy the team approach that others might hate, because the book writers are not necessarily team players. For me, being alone with a book and not knowing the audience's reaction would be scary. All of that is part of a vision shaped by experience, partly media, partly teaching. I have always taught at this level, which means I'm comfortable and familiar with skills-based teaching.

I could have been dropped into Hollywood and told to write a script for a movie, not ever having done it, but I would have had...in some ways I've been trained to media to think it visually, and I might not be any good at it but at least I understand the importance of telling a story visually. Others who are not trained for that would suffer in that environment, so here it's a bit the same thing. I've suffered for the only reason because I've been too ambitious and we didn't have the means....[some text omitted for lack of relevance].

...So, really, my discussion to you today is about a life's experience teaching and going through media and eight years of working with my students and seeing what the old course design couldn't do and what technology could allow us to do, knowing that there are a lot of limits to our production capability. We're only just getting started with some of these ideas. It was also being timid using the video camera UX's videographer was the only person we could work with. It was not that spontaneous

I: What is the importance of the presence you project and the connections you build with students to your overall sense of satisfaction as a teacher?

P: I am aware, probably from the media angle, that you can motivate people to engage in a scenario, to use their imaginations to relate to what they already know. It's a teaching strategy, it's a media strategy, and the **best** courses are the ones where we've done silly things with things that people know. I haven't yet given my students the creative freedom that I gave [other] students where they paraded and pretended they were fashion models to explain what they were: they actually cut out a *Vogue* photo and stuck it on their chest and paraded and explained their whole outfit. Now if I could do that with these classes. I'd be happier, but what I see is that I'm dealing more with a Walmart model...where I'd better be conscious of mass responses, or mass effects.

I: That's sort of the whole institutional approach to online learning, isn't it? You're allowed a certain amount of latitude for creativity, but we need "bums in the virtual seats," too.

P: Yes, I think students can be creative as they progress through the scenarios (I like using humour and I like using imagination) but it's sort of creative freedom between boundaries, and I have actually very strict boundaries.

Interview No. 2 Interview Transcript

I = Interviewer P = Participant

- I:** *How have things changed for you and how you connect with students, and how well the learning management systems that we've got in place right now do that. I'm interested in the different techniques that you use for communicating with your students—both technology and instructional techniques... Part of where all this is going is I'm looking at the relationship between faculty satisfaction and teaching presence so I'm interested in what the connection really is and how well our systems are helping faculty feel some level of satisfaction with their teaching experience...Is it all right if I look at one of your courses to see how it's designed?*
- P:** Absolutely...please do! And I hope you'll look at student comments on the discussion boards, because the discussion boards you and I created are actually one of the real pride and joys that I have, because of how well they work.... What are the questions you want to ask—can you lay out a framework for my comments when we talk about what you are talking about? Did you want to maybe prime me a little more about what you're interested in hearing from me and then maybe I can lay out a bit of a framework for what I'm going to say?
- I:** *Sure. I want to ask you about the technology you use and describe your preferences—what technology you find most useful for talking, if you find technology useful—maybe you don't. What instructional techniques do you use? What constraints do you find—i.e., how do you find the system that we're using and what constraints has it put upon your ability to connect to students? I guess finally my last question is what is the relationship between your sense of presence and your satisfaction—when you connect to students is that a big part of what is important in your job and does the way that the UXSB systems let you interact with students give you satisfaction as a teacher? Please talk...If anything gets missed in your discussion I'll bring it up; otherwise, just follow a framework you're comfortable with.*
- P:** Well yes, there is sort of a theoretical frame that I think needs to be discussed a little bit before I answer those specific questions and the theoretical frame would be composed of epistemological/pedagogical elements for sure and, if you like, some socioeconomic elements. In terms of epistemology, I'm very much a constructivist and I'm one that goes back to the study of John Dewey and the pragmatic school of thought, which is a theory which is based upon a theory of inquiry that dictates how people learn and what they learn. The constructivist, of course, adds the notion that which you actually do is you learn, you construct the notion of reality. Reality isn't a given in the objectivist or positivist sense—it's something that you construct, so the process of education is one in which you are led through a process of inquiry and discovery, where far from being a passive subject of education, or rather, a passive object, you are an active subject of your own education, because as you go through the process of inquiry the purpose of the inquiry, of course, is that you are journeying through life and as you journey you identify and overcome problems and you do so in a shared approach because the environment that we're adapting to is not just a physical environment, where you are stuck in a little cottage in the wilderness all by yourself, either. It's a social environment, and in fact, the process that you go through is one where, you know, you are in essence socializing yourself as part of this process of accommodation and assimilation. So, that's very much of my sort of epistemological, and it's a pedagogical view as laid out by people, as I said, like John Dewey, who heavily influenced me—the study of such psychologists as Jean Piaget and others who held to that particular developmental view and didn't have much use for a system of education as laid down by the Scottish father's education system like Edgerton Ryerson, who said that education is one where you sort of put kids in a room and fill them full of knowledge and strap them when it's necessary. I guess that when I come to AU, then, or any university I've been in I have trouble with a particular view that is propounded quite often, because in the first place its highly individualistic and University X, if it's allowed to go in a certain direction, if the courses are laid out in a certain way is if you want kind of the epitome of this individualized process of education, which is tied in with sort of an economic view of the individual, which says that we're all these little acquisitive, possessive individualists and that the purpose for gaining an education is so that we can acquire more attributes so we become more salable on the open market. And so it's very much an individualistic sort of enterprise of getting ahead, far

removed from the kind of educational process that John Dewey and other people and even some of the modern constructivists lay out. But the challenge in the case of University X is to live up to its mission and one reason why I've stayed at University X as long as I did, in spite of the fact that long ago I made both the silent and the spoken vow that I'd never go back into academia—never—is because of University X 's mission, which is to open up education possibilities to people who have been, for various reasons, obstructed or kept out of mainstream post-secondary education. So I like that, and just to bring a little economic view, a little socioeconomic view, one of the driving forces...See, I'm not a technological determinist—I don't hold that kind of industrialist view of history, which says that it was driven by technology. It was driven by people who used and demanded technology to meet their needs. And the main reason why they wanted technology was to overcome problems that were related to turning around their investments, I suppose, and the investments can be viewed in a very broad sense, not in a narrow sense. So that, for instance, the reason that the chronometer became such an important invention was because sailing ships needed it. In order to carry on international trade; we can go on and on. The history of technological enterprise has been one of overcoming problems of space and time, with a view of contracting, bringing people closer together. If you talk about a strict view of the capitalist challenge to turn around your investment then there's a good reason for that, because you want to turn around your investment as quickly as you can. No good sending a ship out to return with your investment in two years if you can press a computer button now and get a return your investment in 35 seconds. In terms of our educational enterprise at University X, the challenge of distance education is to overcome problems of space and time so the student doesn't have to send their paper in one week and three weeks later get it back because that's how long it takes to turn it around. Now, we can get it turned around in a few days and when students have an inquiry we can turn it around almost instantaneously. If they send me an e-mail, I respond by e-mail. So you see, in a way I applaud the advances that have been driven, and that have made University X possible which makes it possible for us to use technology to reach the kind of students we have, students who have been—for various reasons—kept out of the post-secondary mainstream because we have been successful in inventing and creating technological responses to the challenges of meeting these people we have been able to create a system of education, which is drawn them in. But then we get back to the original problem I outlined. It could be become, then, a highly individualistic, enterprise, where they say “OK, I'm not going to talk to anyone for three years. I'm going to sit in my corner and I'm going to read those courses, and I'm going to click on my computer and in three years I'll have my degree, and then I can go and sell myself.” That would be to sell our process of education short, so you constantly are looking for ways to use technology—because that's what we have to do when you're in distance education—by to create an environment where they feel that they're part of something. If I can talk about my students, my students are primarily people who are [working professionals]—the reason I like them so much, why I've stayed with them so long—is because they kind of epitomize the ideal student in a “John Deweyian” or constructivist sense, I suppose, they come to you with a fairly firm worldview. And you're working with them with that worldview to say, “There are some things that you should think about, there's ways that you should maybe readapt, accommodate some things, that maybe you've never been forced to think about before. I mean, in [one of my introductory courses] we get them to confront the notion that there are these different points of view, these different schools of thought, and in fact, they are deep-seated, philosophical differences....See, that's the whole point....

...And then you have to find enough commonality to make sure that cars are actually produced or that education is produced, or that editors sit down at University X and edit courses. And so, that's that context for learning so when we talk about my presence as a teacher in that context, obviously. I'm the fellow who works in the courses with professionals in University X and we say, “Okay, how can we try to facilitate a learning enterprise or activity that insures that people proceed down a certain process—a certain journey in ‘Deweyian’ sense, a certain process of inquiry that lead them towards education?” And there's another fellow who has shaped my thinking: his name is R.S. Peters. He was an educational philosopher. R.S. Peters was the fellow (I'd be surprised if you find any reference to him today, because I studied him so long ago) , who talked about education as initiation. Because, you see, the central contradiction of education, or conundrum if you want, is that you can't explain to the uneducated person why they need an education, because in order to understand your explanation they'd have to be educated, especially when you come to areas like

philosophy and areas like that. He was a big-time philosopher in the 1960s, in education. Very much in that... that was his major contribution to educational philosophy. So, in a way he said, what you have to do is almost trick people into being educated. You have to almost lead them through a process of initiation, where they don't know why they're being led through the process necessarily, but they almost have to trust you, that by the end of it they will achieve something...They think they're coming for a degree. "Ha! We're going to trick them. We're going to entice them with a credential and in the process we're going to make sure that we change them—that they change themselves, to use my language.

- I: I have noticed in my work with you that you espouse a constructivist point of view, and you like using tools that encourage that. So that ties in to your whole worldview. This gives you a chance—you're working with students, and getting students to work together to achieve a goal.*
- P:** Yes, and we tried to construct our assignments that way .too. One of my favourite courses is the one that I just have a few students in—and the way we've laid that out is I start out by explaining to them when they first phone me for approval that the course is going to be an individualized research course and that they are going to have to create a proposal within the broad outlines of what industrial relations are all about and I kind of talk with them about that for a while. So they come back with something and usually what they come back with is [not the right kind of problem]. They come back with a technical problem...I say, "Put it into a broader context..." And so anyway we get there. So, the finely drafted proposal, that's paper number one. Then, they begin this process of inquiry, in which I expect them to phone me and discuss with me what they're doing and we talk about it and they go into reading research and I say, "Look, what I want from you at the end of this intermediate stage, which is halfway through, is a kind of report on what you've researched and I want it to be in the form almost of a bibliography—a kind of annotated bibliography in which you explain what you learned from that particular research. It may be that you've learned nothing from that piece of research because it only confirms what you already were thinking all along anyway." It allows them to say, "See? There's authority! Before, I accepted it as an article of faith, now I accept it as something that an authority tells me I'm allowed to believe"—kind of like they do in the Roman Catholic Church. Or else there may be something that challenges you or causes you to change but by the time you give me that intermediate paper, that intermediate annotated bibliography, I expect you to be a little bit changed.
- I: So, this is like a "meta-analysis," then? Not only are they doing the assignment and achieving its stated goals; afterwards they analyze the process they went through to get there?*
- P:** Right: the process of education. And by the time they turn in their final paper I expect their final paper to be quite far removed from their original proposal. So, you started out here, you went on a little journey, you ended up there.... So you see, that's the way we do that. So that's if you want my favourite course, and I would construct more of our courses the way that XXXXX is constructed. In a way it's completely shapeless.
- I: It's very "low-tech," too, isn't it? It's a reading course, isn't it?*
- P:** That's right, well, it's a reading course. It's low-tech, and it's shaped by the student. The problem is, and it's a problem that we often confront at University X, that we have adopted a very unfortunate model as far as I am concerned. Even worse than the student as passive recipient of education, which is an unfortunate model, we also have the model of the student as customer. The student is **not** a customer. That is the view. One of the worst things you can call a human being is a consumer because to be a consumer is to be a stupid intaker of stuff that you don't really need. Somebody is manipulating you, somebody is creating a need in you, and somebody is saying, "You have a need, you want to fill it? Buy this."...

Anyway, this is leading somewhere. This journey that we ask students to engage in is one that has to, for very large parts of it, entertain feelings of dissatisfaction, perplexity, even almost deep-seated concern about where is this all going? Our students, too many of them, don't like being perplexed because that wasn't the promise they were given, they were given a promise. So we've tried to engage in some cases in a form of education that's almost like the old notions of programmed learning that came out in the late 1950s and early 1960s, where we led students in small incremental steps to where they've got to go, so at no point did they feel perplexed. I want my

students to feel perplexed because you have to. Otherwise, you're not engaging in a journey of discovery—you're never getting off your living room floor.

- I:** *That's a very constructivist idea, too, that uncertainty is not a bad thing...It's part of how we form a concept of reality together, a shared sense of meaning...If you never challenge yourself, you never have a chance to build those new meaning systems and those new ways of looking at the world.*
- P:** That's right. And never the chance to grow in that way. And so just like I answered your question about how happy I am with University X's technology at overcoming time and space (which is our major challenge) to make our mission impossible, in this case, too, I think that we have encountered a real problem with the use of technology to create perplexity, because it's too easy for students to just ignore those parts of the course that are causing them distress, to engage in education almost like when you're walking through a smorgasbord with all those plates there, trying a little of this and that; my courses don't allow them to do that. One of the best examples is XXXXX, where they expect to be just entertained with some of the technical features....Instead, we force them to consider things like what role are you playing ...and what kind of society are you creating when you build that kind of company, which uses human resources that way? We force students to set out on that journey of discovery, which many of them do not intend to set out on when they register for the course, but that's why R.S. Peters and his theory of initiation is one of my favourite educational theorists.
- I:** *Maybe therein lies the answer to learning. Maybe it's the same thing R.S. Peters is talking about, where we get initiated without even realizing it.*
- P:** Oh yeah, and in the process I did. At a certain point I discovered that I enjoyed reading and I enjoyed learning about those things.
- I:** *[You've described] your interest in pedagogy. You seem to have a mission in mind.*
- P:** Well, that's it, the word is "mission." In a way, my view of education and of what I am as an educator—you talked about my teaching presence—I have a mission. I've got to look for ways to assert myself in such a way as I can be this successful missionary. And so, I've got a challenge: I come to AU and I say why am I here? Well, it struck me that in my experience there were all kinds of things [professionals in my discipline] should engage in and do and know about, and things that I was learning even as I was writing those courses. And that's the other thing: what are you doing when you're actually writing a course? You shouldn't just be writing a course, you should be crafting a series of activities, some of which are reading activities that the students go through. So when I have them go to a case...they're not just going to the chase to find out what the latest authority is from above on the question of a combination of special needs. They're learning how to go to case law... I also force them to go there in person to consider how it is that they think because when you are a [researching a case] you better learn how to start thinking a bit like a lawyer, and lawyers have their own way of thinking. They have their own way of framing issues, which is a completely different way than the man in the street. The man in the street would look at some of our cases, where a driver shows up drunk and drives his cement truck into the wall and we would say, now can the employer fire him? And the man in the street will go, "What're you talking about? Of course!" Ahh, you're not thinking like a lawyer now or a judge. So another reason we force them to go to those cases is to help them to see how the thinking process goes. And so these are all things that we are initiating them into without them really knowing.
- I:** *Well, that's what I was referring to when I was asking about pedagogical techniques you use. You're designing the course but your presence is in there, too. Your whole philosophy [about how you want students] to learn something—is encased within the design.*
- P:** That's right. As much as possible, understanding that we have restrictions of time and space. So just to repeat. We're not writing courses, we are designing a series of learning activities, some of which involve reading, and some of which involve the manipulation of resources that we introduce them to. We make it possible for them to utilize those resources in the future. And we're changing them from being simplistic-minded people, because you should not be simplistic when you think about human resources and people. People are not simple, and the simplistic view of people that was propounded by such people as Mussolini or Hitler...which says that they're simple—just force them to do this...Well, all I can say is good luck in whatever you're trying to do because whatever

company or whatever public institution you're trying to lead will not be successful in doing what it wants to do if you treat your human resources that way. Human resources are complex. I'm forcing them to think that way, so that the RCMP Inspector who came up to me and congratulated me on graduation day for forcing him to change his mind about certain things—that was one of my most gratifying things, because yes, I did. He wasn't willing to consider the question of [certain parties'] rights until I forced him to consider it by getting him to do certain things and he suddenly came to the realization, "Aha! There is another way to look at this. He said, "You know, [these people] don't have rights. They are there to work. We pay them." I said, "Oh. I want you to write a paper on that"....and he did. He came up to me in his red tunic at graduation and shook my hand warmly.

- I:** *OK, that ties into my question about satisfaction. Obviously, you get a lot of satisfaction out of seeing the light bulbs go on.*
- P:** Yes, and it's not just the light bulbs because they discovered something I know; it's the light bulbs that go on when they've gone down the road a little way and certain ideas occur to them, and sometimes the ideas are... my students end up teaching me a lot, That's not rhetorical. Most of my students know way more about [this subject] than I do. But that doesn't mean that I can't fashion an activity for them that forces them to—and I keep using the word "force" because I don't know what better word to use—that says, "OK. I'm going to entice you with these three credits but in the process I'm going to initiate you into a new way of thinking, or to thinking even further" ... "Ahhh, is that what I have to do to earn my three credits? OK." But if you say "No, you're going to earn your three credits only if you show me that you've changed." That's why I gave you the example of XXXXX. I say you've got to show me where your research taught you things or gave you a perspective that you never thought of before. That's what I want to see in your final assignment. And then I know they've been along a process of discovery, which to my way of thinking is synonymous with education.

Interview No. 3 Interview Transcript

I = Interviewer P = Participant

- I:** *My project looks at teaching presence and how instructors establish it online. We've made the shift from a paper-based world to an online world, like many other educational institutions, so I'm interested in how our professors in particular use and adapt our learning environment to define or build that sense of presence. Do you find the technology we use effective? Or maybe it gets in the way of your establishing a sense of presence and connection with your students? Is teaching presence an important aspect of your teaching; that is, are you aware of or do you consciously manage the presence that you project online to your students?*
- P:** Yes! This is an important factor, especially because we're online and we don't get to interact so much with students.
- I:** *Have you taught in an environment where you did have face-to-face interactions with your students? How does this compare?*
- P:** I would say it is a bit isolating, for me and for the students. In an interactive kind of way, it's easier to teach some materials because when they have problems they ask it and then the response is immediate. When it's online like this, they ask, you wait a couple of days, and then you come back with a solution. From their point of view that means we're slow. And it projects the image that we kind of don't really care about them. For us, from our point of view, it's good for us because it is flexible; but it's not so good for us because it gives them a false sense that we don't care. That's why discussion forums are so important.
- I:** *That would be my next question, then. How do you overcome that sense of isolation? First of all, what technological answers have you found? For instance, the discussion board—that's a good tool that lots of people use. Are there any other things in the UXSB learning environment that you've found useful?*
- P:** The quizzes are good; the automatic quizzes because students get instant, everything that they submit gets instantly marked and then the answers given to them. The only thing that I don't like about it is because it's multiple-choice questions only so the reply is kind of limited so A and B and C doesn't really mean anything if they don't really understand the concept anyways, but it's better than nothing.
- I:** *And you can design the comments you send back to [build a sense of your presence]? Do you do that?...*
- P:** Yes I like to do that—bringing your personality into a course is very important, because that is your course, and if you don't have buy-in into it then you can just let it be, right? As well, in [my courses], I've tried to put in as many interactive activities as I can, but I know I can't introduce everything I want at the same time so it's going gradually so right now the new thing is marking with PDF files. Being able to write on it is a personal thing, and that's what I'm trying to encourage—that kind of stuff. As well, interactive activities... The games that we play with the key terms, that's part of it, too; like the hangman exercise, right? That kind of stuff, as interactive as possible, where students can get an answer back as fast as possible.
- I:** *How are you finding Moodle so far? Have you had a chance to explore that world yet?*
- P:** No, because I'm so used to working with Lotus it feels clunky to me. Apparently it has a lot more powerful technology associated with it, but I haven't tried it. The only thing I've tried is within the committee and the thing that I like is in the discussion forum you can actually upload files that you need and that's a good thing...I just have to use it more, I think. I like the discussion block forum. Otherwise, everything else seems to be pretty much the same as before, as Lotus.
- I:** *You seem pretty comfortable with using technology, too.*
- P:** It comes from XX University, where I came from, they kind of push you to use technology... that taught me that if you need to use something, it's just there, you just click, right? If you make a mistake, then you make a mistake. So... a computer crashing is kind of normal here.
- I:** *So, you mentioned you were introducing bits and pieces, you were introducing things slowly, "you*

can't do it all at once" I think is what you said. So, that brings me to one of my next questions; what sort of constraints have you felt working within our environment?

P: Well, the only thing I don't like about the production process is how long it takes because when you are used to (in a traditional university) just you writing the course notes; nobody checking it, but you are reasonably sure that it's all right and when you go to teach the course material if you made a mistake then you can correct it right away, and that's the interactive part. But in the production process, everything needs to be looked at and that adds a lot of time to [its development]. By the time you write it, it goes through the editing process, the production process, technology... at the end of it, it's a year and the person who wrote it has no recollection of what they wrote anymore and no buy-in with it anymore. Do you know what I mean?

I: *Pretty hard to put yourself out and project a sense of presence when you don't you're not connected to what you've written?*

P: Exactly. And then you have to go and relearn everything that you've written before....And that's the other thing; by the time it goes through the whole process, five, six, seven people have already put their input into it and it is no longer just yours. It's the group's, right? And that's not necessarily a bad thing; you just have to turn your head around into thinking about it as a team thing, instead of like the traditional university where you are solely responsible for everything that you teach, and that's academics, right? And it goes through everything that we do, including research. We are responsible for what we do, and what we teach, and what we say; but at University X, in that team environment, the group is [responsible], but in the end you are still responsible for it! You are still the only one responsible for it because you wrote it and you are teaching it.

I: *That separation is throughout the university. I think it's a pretty unique separation of content from the people who created it.*

P: Working with the UXSB is pretty good in terms of my working with an editor because we kind of interact over that time period. As long as the time period is not significant, then it's still okay. When we were working on XXXXX, because we interact so much it's still my course, I'm still writing it although the content and the way it's presented has been changed. It's still my course. Writing it was a long time, but production-wise was not. And that helped a lot. I would prefer to see it limited to four months because that's a traditional semester worth of things or thinking. Things that go on for six months, nine months, or 12 months are a little bit harder to grasp. That was OK. The UXSB, I like the way we do things; I don't know how the other people do things. I've worked with [a specific editor] quite a few times already and we interact over the course of the production, so that doesn't make it that bad.

I: *What sort of pedagogical changes have you made to adjust to teaching online so that you do establish a sense of presence?*

P: Well, I don't know. It's kind of... what I'm saying is... don't take this the wrong way, and I'm just going to be blunt about it. Teaching online is not... I call it an oxymoron because you're really not teaching. Do you know what I mean? You just present the course materials. Teaching involves active interaction, but the way that we present course materials it's just presenting course materials. And in both from our view and from the student's point of view because they get the course materials, and that's what they have, they don't have a teacher—they have a book.

I: *So do the things you have done to compensate—the videos, the other things—does that help?*

P: Yes, it helps a lot. The videos, the interactive games, the discussion forum helps a lot because you get the opportunity to see what students are mostly having trouble with and that informs your teaching pedagogy for the next revision.

I: *Well, it is almost real-time. You talk to someone within a day or two of them putting their thoughts down on the discussion board...*

P: Exactly. But that's what we are being given; that's the environment that we work in, it's online, so that does not jive very well with teaching, actual teaching. In order to do teaching you have to go back to more traditional ways of interaction like videoconferencing or Elluminate. The next thing I'm thinking of doing is online white boarding, and introducing it to all my [academic experts] so that they can use it when they talk to students from that step onto the next step would be defined or

structured office hours for each of them. I have four of them plus me makes five—that will be perfect because then each day there will be a block of two hours where someone is there to answer your questions.

I: Have you talked to your tutors about that yet?

P: We've discussed white boarding and that's this year's goal. I'm going to come up with an Elluminate session that you can just log in to and look at how they can go about doing this stuff. That's the most efficient way. That's the thing; it's the most efficient way of disseminating information—it's just half a video and they can go and look at it—but is it the most effective way? I don't know. It's the same thing as teaching students, right? I can give them the information but is it the most effective way? So I'm going to try to make it as interactive as possible where they can just go and click, they can ask a question and there will be a set number of answers that will come up.

That's the balance, too; I worry about too much technology versus not enough technology—the balance you want to create. I mean, you can throw technology at students every day and not stop doing it for a long time, but what I'd like to have is a committee that says, "OK, this are the technologies we've seen, and these are the ones that you might try and they look pretty good." It's hard for me to know what's out there and what is good for us.

I: Do you get feedback from your students?

P: Hmm...two things. One, first thing is we receive quarterly reports—student surveys. Those are useless, because I have hundreds of students and I get two to seven [responses]. The most I've gotten is 14, the average is seven. That doesn't really work for me. Plus, the only people who fill in surveys, mostly, are people who have complaints, so it skews your observation and it's useless. So I don't really look at them that much. They send it to me every quarter but I kind of glance at it so that doesn't help all. The second thing is, in terms of getting feedback from them, what I do is I ask my tutors to collect comments from students when they send in comments and then at the evaluation time send them to me. I haven't done it this year—I don't know why—but I've asked them to do it in past years and it seems to have worked pretty well. Because I don't don't do [academic experting] any more, I try to get involved once in a while just to make sure that things are going OK, but the good thing is that [one of my courses], because it's been up for so long it's running pretty smoothly right now and all the kinks kind of worked themselves out in a year or so. That's the whole thing too; it takes so long for the kinks to work out and the first few students who go into your new revision are like guinea pigs. They get so frustrated and stuff, so what I tried to do...when XXXXX first came out there were some problems—some little errors and stuff—so what I tried to do was get the students engaged. It was like a witch-hunt or an Easter egg hunt—it was like "OK, good! Now go and find whatever it is that you need to find and come back and tell me about it, thank you very much." So they seemed to appreciate it... that's part of it too with the interaction.

I: Would you say you're more of a constructivist? You want students to go out there and teach themselves more or less, is that it, where you just give them direction? or do you...

P: No...it depends on the course. XXXXX is an introductory course so you have to do a little bit more handholding than for the other courses. For YYYYY, I just say go ahead and do this; if you have questions come and ask me. But for XXXXX, especially, a lot of students come back and say "OK, I don't have the background." That's a big thing, so they have to be helped.

I: So do you gauge the amount of presence you need to establish with students based on the level that there at or the type of course—based on your audience?

P: Yes. Because we have mostly mature students, right? At times, if you handhold them, they kind of get mad.

I: [both laugh] I know...not everyone wants your presence in their class! Some just want you to leave them alone to do their own thing.

P: Yes, some students just...that's the purpose of them coming to us is they don't want to have anybody looking over their shoulder. Again, it's creating that balance between too much handholding and too much hands-off.

I: So that delay between feedback and implementing must make it hard to address things like that. If students find things in the course and you can make adjustments fairly quickly it creates a real

sense that you're there and that your present, but when it takes six months to get changes implemented it must make them wonder if we're not sitting in an ivory tower, to use that old cliché.

P: And that's in some of the comments that I got from students. It's hard. I try to make changes as fast as I can, and the UXSB is pretty good that way, but other things are harder. For example, when I first started I thought "Oh! the course updates! This is my section. I can update things...NO!...That's not it! There's no way for me, if I find something that I need to add into it, to just go "click, click, upload this file" and it's there for all the students to see. And the discussion forum doesn't allow me to do that. [The course developers] must be concerned, right? In Moodle, when I can just upload things or students can just upload things.

I: Maybe [it will provide a new means for] presenting [your course content].

P: Exactly....I did not like the way that I was taught [my discipline] because in the traditional university it's worse....,You're given a book, you read the book, you go to the lecture, a guy talks about the book, and that's it. And they all have PhD's...so it's all over if you're not in that line. And that's what I've been trying to do with this course, is to make it a step-by-step process where you learn one thing, you do the exercises, you learn another thing, you do the exercises. That's the way I learn and that's the way I teach. And I think it's a reasonably good way of learning. You learn content and do an exercise. That's the way I learned and I think I've been pretty successful at it so I thought it would be a good method but, I don't know.

I: Well, I have one more question I'd like to ask you. How does the presence you build with your students tie in to your satisfaction as a teacher. Do you feel a sense frustration with the presence you establish with your students or do you find it is usually pretty good? Are you able to derive a sense of satisfaction from online teaching in the system we use in the UXSB? Can you sense those light bulbs going on?

P: Yes and no. I kind of miss being able to interact and see people's expressions, like [another professor who had a lot of experience] used to say: "If they nod off or their eyes start to glaze over and you know you're talking over their heads. That part I kind of miss, but no, because in this environment I have to be creative about it; that gives a certain [satisfaction]. When I find a way, and I haven't yet, to teach effectively online that will be a great satisfaction I think. And I think we're moving that way, it's just taking a longer time. I think if and when we find that way, the university will be **the** university to go to for online education and we have to keep searching for that.

I: So, it sounds like you see the main thing we're missing is interaction.

P: Yes, and it doesn't even have to be face-to-face interaction in this new technological world. A lot of things we see, like Facebook and Twitter and all that stuff, it's not face-to-face but it's almost instantaneous.

I: Do you think [students] establish a good critical sense about [each other]? Without being able to look people in the eye, who are you dealing with? You can be anybody you want to be online. You still have to have a personal connection, to feel that chemistry, to understand each other and it's hard to do that online.

P: No, and that's what's lacking in our online teaching methods.

I: Do you think it's better than when we were sending course packages out to students?

P: Yes it's much better, but that's another thing. The thing is, there is kind of a tactile sense, a sense of touching something... you send something to someone and they have it as opposed to being online and if your computer goes down you have nothing. The act of physically sending someone something connects you to them whereas if they have to do everything by themselves then you're just a bystander...if and when we move to e-books that's going to be worse so I think that in the end it's incumbent upon us to send things to students to remind them that we're here. I don't know if this would be possible but even a postcard, a personalized postcard, from your professor saying that this is me, these are your [academic experts], these are their hours, and if you need any help call us—something like that would be nice... Just to let students know we are real people, that we are here and we can help you. A lot of students I've talked to have said they didn't know that they could ask questions because in a traditional university, with assignments and such you're supposed to just go off and do your own thing; don't come back until you have something. But here

I actually want to actively encourage them to call us and ask questions about these things because that's the main tool with which you learn, is to do the exercises and assignments. So that's the difference.

I: *So you have to reeducate students at the same time?*

P: Yes, and the first interaction between me and them is the most important because that sets the tone for future interactions.

I: *So what is the first interaction for you?*

P: Nothing. That's what's lacking. And that should happen in the beginning when they send the course package. That's why I've been thinking about the idea... one of the ideas I had when I first started was why can't I have a list of the students who start every month on the first and I will just send them an e-mail.

I: *So what is the issue? Are you not allowed to see the student lists?*

P: [Shakes head] I don't have access to them.