

THE NEGOTIATION OF TEACHING PRESENCE IN INTERNATIONAL ONLINE  
CONTEXTS

by

TANNIS MORGAN

M.A., University of British Columbia 2001  
B.A., Université Laval, 1993

A THESIS SUBMITTED IN PARTIAL FULFILLMENT  
OF THE REQUIREMENTS FOR THE DEGREE OF

DOCTOR OF PHILOSOPHY

in

THE FACULTY OF GRADUATE STUDIES

(Language and Literacy Education)

THE UNIVERSITY OF BRITISH COLUMBIA

(Vancouver)

July 2008



Tannis Morgan, 2008

## ABSTRACT

A particular interest of distance education researchers is the community of inquiry framework, which was developed for the purpose of taking a closer look at computer mediated communication in educational contexts (Garrison, Anderson, Archer, 2000). However, it is somewhat surprising that although the community of inquiry framework has been developed based on distance education contexts, it does not consider the complexities of the community's global and local contexts, the potential linguistic demands of the teaching and learning contexts, and how power, agency, and identities are negotiated in these contexts.

Through six cases of online instructors teaching in international contexts at the tertiary level, I explored the negotiation of teaching presence as viewed through the lens of cultural historical activity theory (Engeström, 1999, 2001). In this view, instructors are engaged in a dynamic process in which teaching presence is shaped through the mediating components of the activity system. This multi-case study employed cross case analysis drawing on data from interviews with students, program coordinators, and instructors, in addition to analyses of discussion forum transcripts, course documents, formative evaluations, student and instructor reflections, and researcher-participant observations. The linguistic challenges faced by both instructor and students for whom the language of instruction was a second or third language and instructors' sociocultural identities, positioning, and conceptualization of the online interaction spaces were found to be important mediators in the negotiation of teaching presence.

## TABLE OF CONTENTS

ABSTRACT .....	ii
TABLE OF CONTENTS.....	iii
LIST OF TABLES.....	viii
LIST OF FIGURES .....	ix
LIST OF ABBREVIATIONS .....	x
ACKNOWLEDGEMENTS .....	xi
CHAPTER 1: INTRODUCTION.....	1
Background.....	1
Statement of the problem.....	3
Statement of the purpose and significance of the study .....	6
Personal perspective.....	7
Definition of terms.....	8
CHAPTER 2: LITERATURE REVIEW AND CONCEPTUAL FRAMEWORK .....	11
Introduction.....	11
Current discussions on interaction .....	11
Conceptualizing online interaction as communities .....	14
Non-participation in online communities .....	17
Contribution of language education research .....	18
Characteristics of current research on online teaching.....	20
Teaching presence.....	24
Conceptual frameworks.....	28
Different generations of cultural historical activity theory (AT).....	28
The use of AT in understanding online teaching .....	35
How AT and SL are different .....	40
Extending AT and SL .....	42
Positioning and identity .....	42
Identity .....	45
Summary.....	53
CHAPTER 3: RESEARCH METHOD .....	56
Introduction.....	56
Research questions.....	56
The activity system in relation to the community of inquiry .....	57
Explanation of terms .....	58

Presence vs. online teaching .....	58
Distance education .....	60
Interaction spaces .....	60
Procedures.....	60
The qualitative research paradigm .....	61
Multicase study design .....	63
Defining case study research.....	65
Multicase study and cross case analysis .....	66
Sampling and selecting cases.....	68
Cases and the use of theory.....	69
Case study methods .....	71
Quality and verification .....	72
Role of the researcher .....	75
Bounding the study.....	75
Setting .....	76
Actors .....	83
Events .....	84
Processes .....	85
Selecting cases and sampling.....	85
Ethical considerations.....	86
Data collection and sources .....	87
Data analysis procedures .....	96
Technical procedures.....	96
Analytic procedures.....	97
Cross case analysis procedures .....	99
Strategies for validating findings.....	100
Reporting the findings.....	101
Purpose of the study .....	102
Organization and structure of the case reports.....	103
CHAPTER 4: CASES.....	105
William.....	105
Background to the case.....	105
Case data.....	105
Course design.....	106
Perspective on the problem.....	107
Characteristics of William's interactions .....	108
Themes .....	122
Sociocultural considerations .....	122
The constraint of time.....	124
Discussion.....	128
John .....	130
Background to the case.....	130
Case data.....	130

Course design.....	130
Perspective on the problem.....	132
Characteristics of instructor interactions.....	132
Themes .....	139
Online content as “teaching presence” .....	139
Teaching presence in relation to the co-instructor .....	140
Technological constraints .....	148
Identity .....	150
Sociocultural considerations .....	151
Competing activity systems .....	156
Discussion.....	157
Joanne .....	159
Background.....	159
Case data.....	159
Course design.....	160
Perspective on the problem.....	162
Characteristics of instructor interactions.....	162
Establishing a personal voice.....	164
Awareness of the co-instructor.....	166
Themes .....	167
The importance of understanding who the students are .....	167
Course author or instructor?.....	170
Negotiating the online interaction spaces .....	173
The constraint of time.....	176
Discussion.....	178
Linda .....	180
Background to the case.....	180
Case data.....	180
Course design.....	181
Online Academy.....	181
Metropolitan University.....	182
Perspective on the problem.....	183
Characteristics of instructor interactions.....	184
Themes .....	194
Understanding the student context .....	194
Identity .....	195
Language and identity .....	197
Imagined communities .....	203
Technology as a constraint.....	204
How presence is affected by co-teaching context—a constraint and an affordance.....	206
Tension created by student non-participation .....	208
Discussion.....	219
Daniel .....	222

Background to the case.....	222
Case data.....	222
Course design.....	223
Perspective on the problem.....	224
Characteristics of instructor interactions.....	224
Themes .....	227
Positioning in relation to the co-instructor .....	227
Positioning in relation to the students .....	229
Transfer of practices .....	237
Teaching presence and knowledge of content/area of expertise.....	241
Constraint in not “knowing” students and effect on teaching presence .....	243
Discussion.....	245
Tannis .....	246
Background.....	246
Case data.....	246
Course design.....	247
Perspective on the problem.....	247
Characteristics of instructor interactions.....	249
Themes .....	252
Course design and teaching presence .....	252
Sociocultural considerations .....	256
Language of instruction and teaching presence .....	259
Positioning and identity and teaching presence .....	262
Role of co-instructor and teaching presence .....	264
Role of technology .....	265
Discussion.....	266
CHAPTER FIVE: CROSS CASE ANALYSIS AND DISCUSSION .....	268
Introduction.....	268
Student and instructor posts across all courses.....	268
Online classroom or community? .....	270
Identity, positioning, and teaching presence.....	272
Technology and teaching presence .....	275
Community influences on teaching presence .....	276
Students.....	276
Co-instructors.....	277
Teaching presence in global contact zones.....	280
The role of course design and teaching presence.....	286
Agency.....	288
Summary: Cross case analysis findings .....	290
CHAPTER SIX: SUMMARY, IMPLICATIONS AND CONCLUSIONS .....	291
Introduction.....	291
Summary.....	291

An Activity Theory model of teaching presence .....	296
Significance and implications of the study .....	298
Implications for teaching .....	300
Implications for the community of inquiry model .....	302
Implications for design .....	302
Implications for activity theory .....	303
Future research.....	304
Conclusions.....	305
REFERENCES .....	307
APPENDIX A: CONSENT FORM—INSTRUCTORS.....	326
APPENDIX B: INTERVIEW QUESTION GUIDE .....	328
APPENDIX C: STUDENT QUESTIONNAIRE—CASE WILLIAM .....	329
APPENDIX D: FORMATIVE EVALUATION ONLINE ACADEMY PROGRAM.....	334
APPENDIX E: E-LEARNING TUTORING SYNOPSIS OF COURSE TOPICS.....	336
APPENDIX F: ETHICS APPROVAL CERTIFICATE.....	337

## LIST OF TABLES

Table 1.	Assumptions and Strategies Underlying the Constructivist Paradigm.....	63
Table 2.	Timeline of Course Delivery .....	82
Table 3.	Distribution of Cases and Co-Instructors Across Contexts .....	84
Table 4.	Data Sources .....	88
Table 5.	William’s Discussion Forum Postings .....	108
Table 6.	Instructor Interactions in E-Learning Design .....	133
Table 7.	Instructor Interactions in E-Learning Tutoring.....	162
Table 8.	Instructor Interactions in Foundations of E-Learning .....	185
Table 9.	Instructor Interactions in Teaching and Learning Theories.....	185
Table 10.	Pilot Study: Factors of Non-Participation as Perceived by Different Stakeholders.....	216
Table 11.	Comparison of Linda’s Group Activity to Tannis’ Group .....	218
Table 12.	Comparison of Average Number of Student Posts to the Discussion Forum 219	
Table 13.	Instructor Interactions in Text and Technology.....	225
Table 14.	Instructor Interactions in E-Learning Tutoring.....	249
Table 15.	Instructor Interactions in Teaching and Learning Theories.....	249
Table 16.	Student Feedback On Instructor Facilitation Across Online Academy (Tutoring Certificate) Course Modules .....	255
Table 17.	Comparison of Instructor and Student Posts Across all Courses.....	269



## LIST OF FIGURES

Figure 1. Representation of Third Generation Activity Theory .....	30
Figure 2. Instructor activity system .....	58
Figure 3. Comparison of percentage of William's postings to student postings.....	109
Figure 4. Comparison of number of student posts to instructor posts by day.....	126
Figure 5. Comparison of percentage of instructor to student postings in E-learning Design .....	134
Figure 6. Joanne's number of posts by day.....	164
Figure 7. Conceptualization, identity, and positioning in relation to the instructor activity system.....	297

## LIST OF ABBREVIATIONS

For clarity, I have tried to keep the use of abbreviations to a minimum. I have adopted the following abbreviations for frequently used terms.

AT	cultural historical activity theory
COI	community of inquiry
CMC	computer-mediated communication
CMS	course management system
DE	distance education
f2f	face-to-face
LPP	legitimate peripheral participation
SL	situated learning

## ACKNOWLEDGEMENTS

There were many colleagues, friends, family, and advisors who made this dissertation possible.

I am grateful to my colleagues, former and present, at the Distance Education and Technology/Office of Learning Technology at UBC for granting me the time and space to conduct parts of the research. In particular, my colleague Karen Belfer deserves special credit for providing me with stimulating conversation and the opportunity to explore ideas.

There were many students and instructors, project managers and course coordinators who participated in the research. In particular, my colleagues in Croatia who arranged interviews with students at a particularly busy time on very little notice, and who granted permission for me to conduct part of this research.

My committee members, Teresa Dobson and Mark Bullen were a valuable source of support and advice. I must also single out Stephen Carey, my thesis supervisor who has provided me with incredible mentorship and support, during both my masters and my doctoral programs, going far beyond the call of duty.

I am grateful to Natalia Gajdamaschko for allowing me to sit in on her course on Vygotsky, helping me get on a path by providing me an outline of readings and taking the time to email me articles while she was busy with marking assignments and numerous other duties.

The most important support has been my family, who allowed me to spend valuable family time attached to my computer without complaining. My husband Bob,

daughter Thea, and more recently, Owen and Antoine, have made the most sacrifices in these past four years, and without their unconditional love and support I would have not even bothered. I look forward to giving them the attention they deserve, and credit them with providing me with the reason to carry through.

## CHAPTER 1:

### INTRODUCTION

#### **Background**

Online learning globally is now firmly entrenched as a mode of delivery for distance education. Distance education has come a long way technologically from its roots in print correspondence education, which can be dated to as early as the late 1800s (Bourdeau & Bates, 1996). More recently, the field of distance education has become synonymous with online learning and web-based technologies, resulting in a very different perception of a distance education learner and instructor. The image of the lonely distance student, at home with their books and only occasional contact with a instructor by telephone, is, in North America at least, one of the past. Technology has been a driver for change in the way we think about teaching and learning in higher education, and in many cases has resulted in a greater interest in implementing a more constructivist pedagogy, where participation, interaction, and exposure to multiple perspectives plays a central role. In addition, a constructivist approach to teaching and learning has been enabled by a measurable improvement in teacher-student and student-student communication, namely through the use of asynchronous computer-mediated communication (CMC) tools. This change has been so significant, that in many ways, web-based courses are able to reduce the transactional distance (Moore, 1973, 1989) in ways that face-to-face (f2f) campus courses are still unable to achieve.

Research on online teaching is supported by an interest in a ‘new’ teaching context, which, through online transcripts of course content and interactions, provides an opportunity to gain a better understanding of constructivist approaches that often define this new context. It is the emphasis on social interaction, firmly aligned with a constructivist pedagogy, that has led to a large body of research that looks at the importance of interaction in the design of online courses. In a distance education context, the increased interaction opportunities afforded by new communication tools represents a shift in the role of the instructor, from one of a provider of support in the transmission of content for independent learners, to a facilitator of highly interactive online learning spaces. While it could be argued that this shift is not unique to online teaching and learning contexts, there is both recognition and interest in the fact that the emergence of communication technologies have provided the means for understanding of what it means to facilitate this collaboration and to facilitate online learning. For example, Coppola, Hiltz, and Rotter (2002) suggest that online interaction “leads to different paradigms for teaching and learning, as compared to teaching in a traditional classroom” and in which “the instructor/facilitator must reconceptualize their role as a teacher...” (p. 170). Lea and Nicoll (2002) underline that it is important to not regard these technologies as mere “technical improvements” to existing teaching contexts, since:

Technology can thus be viewed unproblematically as a mere vehicle for the same kinds of communications that have always taken place between teacher and learner, where pedagogy and the organization of learning remain unaffected. However, this view masks the extent and complexity of

the changes taking place, of the requirements for substantial institutional change and of reconfigured practices and understanding of pedagogy. (p. 6)

Yet, as Coppola, Hiltz, and Rotter (2002) have noted, there is little research that looks at “how the technology changes the teaching process and the role of the university faculty member” (p. 171). Therefore, while it is important to draw on the considerable classroom-based teaching research that already exists, I would argue that online teaching in distance education requires particular attention to this context because it is defined by a different type of student and teaching and learning conditions. Distance education (DE) not only attracts the working, professional adult learner, but it can also transcend traditional institutional and national boundaries through offerings of “open” programs and in enabling access to these programs to an international audience.

### **Statement of the Problem**

How do instructors negotiate the practice of online teaching? What does it mean to teach in these varied, and technologically defined contexts? Is it simply a question of transferring face-to-face practices to the online context? Is technology driving the teaching process, or is technology affording the opportunity for creative or innovative online teaching practices that, until now, have not been possible? While DE research has

begun to investigate some of these questions in the last twenty-five years, the field itself is surprisingly still theoretically immature.

A particular interest of distance education researchers has been the community of inquiry (COI) framework, which was developed for the purpose of taking a closer look at computer mediated communication in educational contexts (Garrison, Anderson, Archer, 2000). Three components in this framework that are deemed to be essential to the creation of formal online learning contexts are social presence, cognitive presence, and teaching presence. Although much of current research that adopts the community of inquiry framework has largely focused on the social presence dimension (eg. Richardson and Swan, 2003; Rourke et al., 1999), the community of inquiry framework has also been useful in providing researchers with the construct of “teaching presence”, used to describe “the design, facilitation, and direction of cognitive and social processes for the purpose of realizing personally meaningful and educationally worthwhile learning outcomes” (Anderson, Rourke, Garrison, Archer, 2001, p. 5). The elaboration of this construct was undertaken not only for the development of an analytic tool to assist the research process into online teaching, but to also to provide a means for instructors to assess, reflect, and subsequently make changes to their own postings (p. 2). Anderson et al. (2001) identify three categories to describe instructor roles in online teaching—instructional design and organization, facilitation, and direct instruction—and their respective indicators. These categories and indicators provide a tool for content analysis of discussion forum transcripts.



Although the construct of teaching presence is closely related to research that describes the functions and roles of online teaching (eg. Berge, 1995; Salmon, 2000; Offir et al., 2003), it differs in a key way, in that it is seen as being an essential component of a community of inquiry. In this sense it provides a broader and more contextualized view of online teaching, in which the students, content, and instructors play a central role in creating the community of inquiry, and of which social presence, cognitive presence, and teaching presence are interdependent. Yet, despite the fact that the community of inquiry framework attempts to go beyond simply describing individual interactions, the construct of teaching presence is a cognitive framing of the instructor, focussing largely on describing what kinds of interactions instructors make in online teaching and learning contexts. In my view, the teaching presence construct is useful at identifying what instructors (and students) do in a community of inquiry but is limited in achieving the purpose claimed by Anderson et al. (2001) at diagnosing problems in online teaching since it does not get at the “whys” related to instructors’ interactive decisions. In addition, it is somewhat surprising that although the community of inquiry framework has been developed based on distance education contexts, it does not consider the complexities of the community’s global and local contexts, the potential multi-linguistic demands of the teaching and learning contexts, and how power, agency, and identities are negotiated in these multicultural contexts.

## **Statement of the purpose and significance of the study**

In my view, it is important to begin looking at online teaching and teaching presence as situated in cultural, institutional, and historical practices. This would represent a shift to a sociocultural view of teaching presence where online teaching and teaching presence is seen as a social practice of which agency “the socioculturally mediated capacity to act” (Ahearn, 2001, p. 112) is “enabled and constrained (a) by material and semiotic tools such as languages and literacies, pedagogical frameworks, and conceptions of learning; (b) by the relevant communities; and (c) by the historical and emergent rules and divisions of labor that structure the ongoing activity” (Thorne, 2005, p. 397). A sociocultural view of teaching presence would need to consider how instructors in an online community of inquiry negotiate their participation in communities of inquiry in relation to their own identities as instructors (Duff and Uchida, 1997; Varghese, Morgan, Johnston, and Johnson, 2005), and how instructors are positioned and position themselves both socially and discursively (Linehan and McCarthy, 2000). Shumar and Renninger (2002) remind us that an online community is a “multilayered communication space” (p. 12) and Thorne (2005) has noted “within a particular social-spatial-temporal configuration, there are constraints and affordances that make certain actions probable, others possible, and yet others impossible” (p. 400). Therefore, the purpose of my study is to reframe the construct of teaching presence within a sociocultural perspective.

## **Personal perspective**

My interest in this topic is both professional and personal. As a course developer for a large distance education unit, part of my role involves helping instructors become comfortable with online teaching, and helping them make the transition from the face-to-face environment. I have also taught up to three online courses per year for various institutions, and have had the opportunity to reflect on my own practice and the challenges it presents and how it is reflected in the literature. There is no shortage of ‘recipes’ and tips and tricks for online teaching success, but these are often presented as if contexts are homogenous and present no unique challenges. In addition, the distance education literature provides little consideration of the role of language of instruction as a challenge to both students and instructor participation, which seems to be a serious gap given the important literature that exists in language and literacy education. My own experiences as a second language student, an online student, an online instructor, and an online instructor teaching in my third language have afforded me a certain sensitivity to understanding the online teaching and learning context.

I am also perplexed by the language being used to describe online teaching, alternating between “facilitation”, “moderation”, and in some cases, “guiding”. At my own institution I regularly encounter a discourse that places considerable emphasis on the online teaching role to reflect a “guide on the side” in preference to a “sage on the stage” approach. Yet, having experienced a range of online teaching approaches as an online student, I question whether an emphasis on one or the other is productive. I don’t see this

view as a bias that I bring to the study so much as an open mind, since this perspective is not one that has been reflected in the literature on online teaching.

### **Definition of terms**

The field of educational technology and distance learning is filled with overlapping terminology to describe learning contexts and the tools that shape these contexts. I provide the following definitions for some frequently used terms, but recognize that alternate definitions exist in the field.

*Course management system:* A software that provides an online course environment for students and instructors, and provides several features to enhance the teaching and learning experience. This includes communication tools such as asynchronous discussion forums and synchronous chat, internal email, student tracking data, student gradebooks, and content pages. This software usually supports audio and video in addition to text content.

*Computer-mediated communication:* Any communication that is computer mediated. In the context of this research, it is largely text-based asynchronous communication through the use of online discussion forums.

*Distance education:* Course delivery where the students and instructors are not sharing a physical classroom environment.

*Face-to-face:* Refers to traditional course delivery, where the students and instructor are physically located in a classroom environment.

*Online:* Course delivery that is made possible through the internet, using a course management system.

*Mixed mode/blended:* Course delivery that uses both face-to-face and online environments, to varying degrees.

*WebCT:* A course management system that was originally developed at the University of British Columbia for the purposes of enhancing teaching and learning in higher education. This system is now being used globally for both mixed mode and distance delivery, and across all sectors of education. The company was recently purchased by another course management system company (Blackboard) and the name has transitioned to WebCT-Blackboard. For clarity, I simply adopt WebCT to refer to this system.

*Discussion forum:* A course management system tool that allows online asynchronous text-based communication between students and instructors. The tool usually (but not always) allows threaded organization of topics, identifies the poster of the message, identifies whether the message is a reply or a new posting, and the time and date posted. Distance courses often organize the forum into weekly discussion topics.

*Asynchronous:* Refers to online communication that does not require that the initiator and the receiver be online at the same time (eg. Email).

*Synchronous:* Refers to online communication that requires that the initiator and the receiver be online at the same time (eg. Instant messaging /chat).

*Weblog (blog)*: An online software (Eg. Blogger, Wordpress) that allows a user to easily publish and maintain a chronologically organized website. These are often (but not limited to) personal journals, reflections, and commentaries on topics of the user's choosing.

## CHAPTER 2:

### LITERATURE REVIEW AND CONCEPTUAL FRAMEWORK

#### **Introduction**

In this chapter, I provide a review of the literature on interaction in online teaching and learning contexts, and the conceptualization of these contexts as communities. I will then provide a brief discussion of research that describes online teaching in terms of functions and roles. I will focus on the construct of teaching presence in a community of inquiry, and suggest that this popular construct could be reframed to reflect a more sociocultural view of online teaching. I then discuss the sociocultural theories of activity theory (AT) and communities of practice (COP) and how they could expand the current framing of teaching presence.

#### **Current discussions on interaction**

The importance of interaction for learning has been documented by educational theorists such as Dewey (1933) and Vygotsky (1978), and more recently by Anderson (2003). The importance of interaction in distance education can be traced to Moore (1973), who introduced a theory of transactional distance that highlighted a dialogue component as important to distance learning. This theory was developed at a time when distance education (DE) was characterized by correspondence courses (usually paper based), where a geographic separation between the student and instructor allowed few

opportunities for interaction. However, rather than focus on the geographic characteristic that defines distance, Moore attempted to identify the psychological distance in distance education by focussing on the interplay of three variables that define the learning transaction between teacher and students — structure, dialogue and autonomy. Structure refers to the design of the course and the level of control that the instructor or students have within that structure. Dialogue refers to the positive or constructive interactions between the student and the instructor and/or the internal dialogue of the student with him or herself. Autonomy refers to the ability of the student to take responsibility for his or her own learning. Therefore, a learning context that has a high level of structure and little dialogue would have a large transactional distance. Anderson (2003) provides an updated theory of interaction as it relates to formal online learning contexts, proposing that “sufficient levels of deep and meaningful learning can be developed as long as one of the three forms of interaction (student-teacher; student-student; student-content) are at very high levels. The other two may be offered at minimal levels, or even eliminated without degrading the educational experience” (p. 4). His theory is based on his observation that students have a range of preferences and needs for different types of courses (paced/unpaced, synchronous/asynchronous) and some even chose options where minimal student-teacher or student-student interaction is required.

There are undoubtedly potentially many secondary variables that have an influence on the transactional distance. These include the mode of communication or communication tools, the characteristics of the learners, the characteristics of the instructor, and the institutional context. In the context of the student, the mode of



communication is particularly relevant since it directly relates to the language of instruction. For example, research indicates that students who are interacting in a second language will benefit from asynchronous communication (typically text discussion forums) since it allows them more time to process the message, the option to reread or replay, and the flexibility to construct responses on their own time (Carey, 1999; Carey & Guo, 2003, Meskill & Anthony, 2005).

It is not difficult to see how asynchronous discussions provide a potentially important role in facilitating dialogue, and thus reducing distance. Although Moore clearly distinguishes between interaction (broadly defined student-student, student-instruction, and student-content communication) and dialogue (purposeful, constructive, instructional interaction) distance education research has largely looked at how interaction facilitates learning. The majority of these studies measure perceptions of learning, as reported by students, correlated to frequency of interaction. Many of the studies report that more interaction leads to a higher perception of achievement of learning outcomes or learning (eg. Chen & Willits, 1998, Wu & Hiltz, 2003). And since distance education has long been associated with higher rates of attrition, it is not surprising that frequency of interaction has also been used as a predictor of course completion. For example, Morris, Finnegan and Wu (2005) found that successful students (completers) “engaged in online learning activities with greater frequency and greater amounts of time than unsuccessful, withdrawing students” (p. 228). While their study did not look at the quality of interaction, they suggest that their results provide an important “basis for understanding the complex interactions between students, faculty, course

materials and course structures” (p.229). In accounting for potential reasons for withdrawal from the online courses, they recognize that personal factors such as illness or finances or being academically unprepared might also be factors, in addition to student motivation (p. 228). Unfortunately, their study did to look more closely at this important aspect of non-participation.

### **Conceptualizing online interaction as communities**

Given the social nature of constructivism and the adoption of this pedagogical view in the design of many online learning contexts, it is not surprising to note that the description of online interaction is more likely to adopt a community metaphor, as opposed to a virtual classroom metaphor. For example, Rovai (2002) points out that the interest in community goes beyond the field of education, but in online contexts, a sense of community is important to reduce attrition caused by physical separation. For others, community is important to help learners feel less distant (Brown, 2001). Yet, the use of the word “community” is problematic, since it implicates many potential definitions, especially in the context of adult learning where “learning in the community” or “community learning” is quite distinguishable from “learning communities”. Additionally, the work of Lave and Wenger (1991) and Wenger (1998) has introduced the idea of “communities of practice” (COP) to DE. Lave and Wenger define a community of practice as “a set of relations among persons, activity, and world, over time and in relation with other tangential and overlapping communities of practice” (p.

98). In this view learning is “an evolving form of membership” in communities of practice (Lave & Wenger, 1991, p.53). However, it is questionable as to what extent communities of practice can exist within the context of formal learning environments that are largely constructed around tasks and activities. In other words, when community is added to the DE and higher education discourse it raises important pedagogical questions, namely, can communities of practice reside within designed formal education? If so, how do we design online communities of practice? This is also a question that Conrad (2002) raises in noting that many DE learning communities are contrived spaces, and characterizes them as their own type of social aggregation where “learners are pushed, not pulled, into a community somewhat like an arranged marriage” (p.4).

Johnson (2001) provides a review of some of the research on online communities and attempts to provide some conceptual order to the use of this popular metaphor. He makes an important distinction between virtual community and communities of practice that is helpful in reconciling this apparent contradiction between designed versus emergent communities. He distinguishes between a virtual community that is designed around an idea or a task and communities of practice, which “emerge within the designed community via the ways that participants use the designed community”(p. 45).

Interestingly, he observes that none of the studies in his review looked at how virtual communities could be designed to lead to an emergence of a community of practice.

Brown (2001) has attempted to develop a theory about how community is formed in DE online. She identifies three levels of community, and it is both interesting and not surprising that the highest level was found in learners who had been through several

courses together and communicated outside of the course. Furthermore, she reports the reciprocal nature of level of community and participation, whereby if one increased, so did the other (p. 24).

The community of inquiry framework (Garrison, Anderson, & Archer, 2000) has generated considerable interest in the construct of social presence in relation to the development of online community. Studies on social presence look at frequency of postings, and perform content or discourse analysis of discussion forum transcripts. This research asks what the components of social presence are, how it is important to learning, and how online courses can incorporate structures that will enhance or encourage social presence. For example, Richardson and Swan (2003) found that high social presence correlated with a high perception of learning and satisfaction with the instructor. Beuchot and Bullen (2005) noted the importance of interpersonal and interaction and recommended that the development of socio-emotional climate not be ignored by online instructors (p. 82), even suggesting that instructors even establish interpersonal connections before taking on academic tasks.

Since community is closely tied to the notion of participation (in fact, in Lave and Wenger's view, the purpose of community is learning how to become legitimate participants within the community of practice) and learning, it is natural that research should question what factors influence participation in online contexts. Dennen (2005) asks what design and facilitation factors affected various dimensions of participation and found that facilitation in the form of instructor presence and frequency of feedback to be important factors influencing participation. Swan (2002) also looked at how course

design factors correlated with satisfaction, learning, and interaction, and one of the findings suggested that student to student interaction was particularly influential in the development of community. Conrad (2002) goes beyond design factors and specifically asks what conditions influence decisions to participate in online activities, and while her results suggest that “community was constructed and maintained as a necessary tool for the completion of tasks”, the creation of online community was fundamental in creating a successful learning environment.

### **Non-participation in online communities**

If interaction and participation are such important dimensions of community, what does the literature say about non-participation or low interaction? Rovai and Barnum (2003) found that when they looked at perceived learning in relation to active or passive participation, only active participation (as measured by the number of postings) lead to a higher perception of learning. Yet, some research on non-participation also tells us that we need to re-evaluate how we view non-participation in online contexts.

Beaudoin (2002) looked at a small sample of students enrolled in an online graduate course and found that non-visible students were still spending a lot of time logging on and engaging in learning-related activities. Nonnecke and Preece (1999) interviewed ten people about their participation in various internet communities (informal contexts), and found that some of their interviewees felt a strong sense of community in their communities, despite never posting. Finally, Gray’s (2004) study on informal learning in an online COP found that “even peripheral lurking, where members read postings but did

not actively contribute to the online discussions, was a legitimate form of learning and participation” (p. 33).

### **Contribution of language education research**

There is a certain paradox in the research on online community in distance education, in that despite the increasingly global nature of online programs and offerings, where students and instructors may or may not be participating in a language of instruction that is their first language, and where students and instructors may or may not share the local academic context or environment, that there has been little concern by distance education researchers to account for these variables and contexts in their discussions of online learning communities. Yildiz and Bichelmeyer (2003) are an exception, in that their study looked specifically at the participation patterns of international (EFL) students in a web-based graduate program, and found that although CMC afforded the EFL students certain advantages, linguistic barriers and cultural differences created definite challenges. The work of Warschauer and Kern (2000) has also been fundamental in advancing research in the area of second language and network-based teaching (Warschauer & Kern, 2000) but their focus has been on second language learning as opposed to learning in a second language. In a DE context, a recent study has highlighted that instructors facilitating online in their non-native language might actually participate differently than instructors in their native language (Swan, Schenker, Arnold,

& Kuo, 2007), but note that this is an under-investigated area of the literature and one that deserves greater attention in online education research.

Additionally, social practice perspectives in applied linguistics research have revealed that notions of participation and non-participation are complex. In Yim's (2005) dissertation, she describes how students participated differently in different courses with online components. In Class A, an unstructured approach created a very different form of participation than Class B, where the rules and structure ultimately lead to the near marginalization of some students. And although Morita's (2004) study looks at face-to-face participation, it reveals the struggle of non-native English speaking students to be legitimate participants in graduate classes. Language education research, specifically telecollaborative projects described by O'Dowd (2003), Belz (2003), Thorne (2003), have explored more deeply the complexity of language in international telecollaborations in relation to the socio-institutional affordances and constraints of participating groups. This research adopts sociocultural frameworks to examine broader issues of language learning activity. Telecollaborations differ from DE contexts in that language learning is the object of the collaboration, and the telecollaboration is often situated as an activity within a language course. Since DE studies have largely assumed that language is not a constraint influencing participation, there is a gap in the literature that describes the role of language as a constraint or an affordance in DE online contexts.

## **Characteristics of current research on online teaching**

It is clear from some of the research that distance education researchers have paid careful attention to the importance of interaction and community building within DE courses. The conceptualization of online learning contexts as communities raises questions as to how the instructor is situated within these communities. Do instructors position themselves as equal participants, or do they engage in a role of an expert? Research on teaching in online contexts has attempted to identify the roles of the instructor, and how their interactions guide and facilitate student learning or contribute to the development of community. Much of this research has been descriptive, adopting content analysis methods to quantify and describe online interactions.

Several authors who have attempted to describe online teaching in terms of functions and roles. Since there are numerous similar categorizations of roles, I will only briefly describe four of the more recent examples to demonstrate the range of conceptualization that exists.

Offir, Barth, Lev, and Schteinbok (2003) build on the seminal work of Henri (1992) in developing a six category instrument for analyzing teacher online discourse. These categories include:

1. Social: teacher statements that create a positive atmosphere and support motivational affective aspects of learning.



2. Procedural: teacher statements containing information regarding administrative and technical issues related to the lesson or course.
3. Expository: statements representing knowledge content
4. Explanatory: the teacher uses a question or comment initiated by the learner in order to explain content.
5. Cognitive task engagement: the teacher presents a question or learning task that requires learners to actively engage in processing the given information.
6. Learning assistance interactions: teacher statements that help students cope with a high cognitive load. (p. 71)

Blignaut and Trollip (2003) also developed a taxonomy of six categories to describe “instructor performance”. In addition to using content analysis, they used interviews with instructors and students to validate the taxonomy and provide insight on the instructor and student perspective of the different types of interactions. Their categories include:

1. Messages with no academic content
  - a. Administrative
  - b. Affective
  - c. Other types of messages (eg. Thoughts for the day, news)
2. Content-based messages
  - a. Corrective
  - b. Informative

c. Socratic question messages

Goodyear, Salmon, Spector, Steeples, and Tickner (2001) provide an identification and description of roles that goes beyond behaviours and into the realm of teaching beliefs, labelling them as:

- Process facilitator
- Advisor counsellor
- The assessor
- Researcher
- Content facilitator
- Technologist
- Designer

Finally, Salmon (2000) proposes a widely adopted five stage model of online learning, whereby students progress through the various stages of:

- 1) Access and motivation
- 2) Online socialization
- 3) Information exchange
- 4) Knowledge construction
- 5) Development

While she doesn't attempt to identify the roles of an online instructor/moderator, the suggestion is that if instructors are aware of these stages they can provide appropriate support at the different stages.

Other research has provided additional insight into various aspects of online teaching. For example, Littleton and Whitelock (2004) investigate "instructional techniques" used in guiding knowledge building, while Murphy, Smith, and Stacey (2005) propose a model of mentoring, coaching and facilitating online discussions based on the message characteristics of instructors, teaching assistants and students. Easton (2003) looks at communication processes that affect online instructor roles and concludes that in an online distance learning (ODL) context "the role of the ODL instructor requires the merging of multiple roles" (p. 103). In a cross case analysis, Dennen (2005) provides some interesting insights as to how different facilitation factors affected learning participation in asynchronous discussion and found that "instructor presence affected how much, and to whom, students wrote their messages in these courses" (p. 142). Finally, Coppola, Hiltz and Rotter (2002) focus their attention on the cognitive, affective, and managerial roles inherent in teaching, and how they change when faculty move from a f2f to an online teaching context.

The above research seems to suggest that there are many possible roles and associated behaviours or actions that define online teaching, and these ultimately have an effect on student perceptions and learning. The critical gap in this research is that it doesn't address the decision-making processes that instructors engage in and the reasons

for such decisions. In this regard, I find the term ‘interactive decisions’, defined as “decisions made during teaching” especially useful, one that has been investigated in f2f contexts by Tsang (2004). In his study, Tsang was interested in the kinds of interactions three ESL teachers made in their teaching of a lesson and the basis for these interactive decisions as it related to their personal practical knowledge. However, distance education research to date has not really gone beyond describing instructor interactions in terms of taxonomies and frequencies of behaviours.

### **Teaching presence**

In addition to the research cited above, the community of inquiry framework has been useful in providing researchers with the construct of “teaching presence”, used to describe “the design, facilitation, and direction of cognitive and social processes for the purpose of realizing personally meaningful and educationally worthwhile learning outcomes” (Anderson, Rourke, Garrison, Archer, 2001, p. 5). The purpose of their elaboration of teaching presence is not only the development of an analytic tool to assist the research process into online teaching, but to “allow teachers to assess and then improve their own postings in online courses” (p. 2). Although their focus is on the computer conferencing aspect of a course, they acknowledge that teaching presence has indicators in other areas of the course. They also acknowledge that both instructors and students can have a teaching presence (although to date, the construct has only been used to look at instructor postings).

In the development of the teaching presence construct, Anderson et al.(2001) draw on three similar classifications of the role of an online instructor—Berge (1995), Paulson (1995) and Mason (1991). They highlight the similarities and differences between the three constructs introduced by these researchers and provide a rationale for their own classification of teaching roles, which they label as: instructional design and organization, facilitating discourse, and direct instruction. They see their classification as being supported by two major research studies (Rossman, 1999; Coppola, Hiltz, & Rotter, 2001). They also reference the numerous publications that provide teaching hints and suggestions for online instructors, but note “these provide few, if any guidelines by which teaching presence characteristics can be measured or assessed” (p. 4). Therefore, Anderson et al. outline the tool that they have created with indicators and examples “that clearly measure and describe the concept of teaching presence” (p. 4).

In describing the first category, instructional design and organization, Anderson et al. draw on their own experiences of distance education where the nature of the distant learning context often requires that the design and planning be fully elaborated up front and be more explicit and transparent than required in a f2f context. Anderson et al.’s second and third categories are more difficult to distinguish from those introduced by Berge (1995). What Berge labels as social and pedagogical roles, Anderson et al. have identified as categories of facilitating discourse and direct instruction. Anderson et al. see the instructor’s role as carrying “higher levels of responsibility for establishing and maintaining the discourse that creates and sustains social presence” (p. 7). Importantly, they note that their description of facilitating discourse diverges from those of others in

that it is not purely social, but “is usually integrated within direct instruction and *in situ* design of instructional activity” (p. 7). In other words, stimulating the social process has a direct relationship with the achievement of individual and group learning.

Direct instruction is comprised of indicators of instructors providing “intellectual and scholarly leadership and share their subject matter knowledge with students” (p. 8). Anderson et al. reference Vygotsky’s (1978) concept of scaffolding in clarifying how teachers support student learning of content and highlight that the widely accepted view of the ‘guide on the side’ has been misinterpreted and ignores this important cognitive apprenticeship role of an instructor.

Much of the research that adopts the teaching presence construct is concerned with evaluating effectiveness of what instructors do in relation to student satisfaction and perceptions of learning. For example Shea, Pickett, Pelz (2003) found that students’ perception of teaching presence in relation to learning and satisfaction was more important than student-student interaction—in other words, even though student-student interaction was occurring, the students perceived it as having less value on their learning than the teacher-student interaction. Looking at a blended context (where instruction took place both online and f2f), Stein and Wanstreet (2005) found that students were more satisfied with the level of dialogue and instructor interaction with online instructors than with f2f and note: “the further the group moved away from the instructor’s online or physical presence, the lower the perception of teaching presence. This suggests that instructors may want to compensate for their lack of physical presence by increasing their

electronic presence through email or discussion postings that acknowledge the group's input" (p. 4).

Although the construct of teaching presence is closely related to the research that describes the functions and roles of online teaching, it differs in a key way, in that it is seen as being an essential component of a community of inquiry. In this sense it provides a broader and more contextualized view of online teaching, in which the students, content, and instructors play a central role in creating the community of inquiry, and of which social presence, cognitive presence, and teaching presence are interdependent components. However, the predominant use of content analysis methods has limited the focus to cataloguing interactions, and has neglected a closer look at the contextual conditions in which presence take place. As a result, teaching recommendations are sometimes made that might not apply to a diversity of contexts. For example, Garrison, Anderson and Archer (2000) recommend that discussion topics should last a week or two at the most in order to encourage deep reflection, and small groups can be used to provide greater opportunity for dialogue without producing a large number of message postings (p. 97). While this recommendation is certainly adopted in many online course designs, it is open to debate as to whether it is suitable for different kinds of teachers, students, and courses, and in various online teaching and learning contexts. In our own experience in an international online teaching experience we found that small group discussions were ineffective in engaging students in participating, let alone in encouraging critical discussion (Belfer, Morgan, & Underhill, 2005). We adopted a cultural-historical activity framework (Engeström, 2001) to explain how the students' prior educational experiences

and understandings of both the object of the activity as well as the roles of students and instructors created a tension that resulted in non-participation.

## **Conceptual frameworks**

I have argued thus far that in order to gain a broader perspective of online teaching presence, it is necessary to adopt a sociocultural perspective which would view online teaching as a negotiation shaped by the constraints and affordances of the teaching context. In my view, there are two sociocultural frameworks that are helpful at looking at online teaching as a practice. While both of these frameworks have their own strengths and weaknesses, they provide a useful lens in which to broaden the construct of teaching presence. I will begin this section by describing both cultural historical activity theory (AT) and situated learning (SL) and my view on how both of these frameworks are useful for describing and analysing online teaching contexts. Within this discussion I will also explore related notions of identity and positioning, and their importance in providing further insight into understanding the negotiation of teaching presence within the constraints and affordances of the teaching context.

### ***Different generations of cultural historical activity theory (AT)***

The evolution of AT is described as being comprised of three generations (Engeström, 2001). First generation AT finds its origins in Vygotsky (1978), who



described human activity as being mediated by tools, and this mediation was essential to the development of individual and collective thinking. Essential to this idea was that the unit of analysis was no longer the individual, but the activity itself in which the subject, the object of the activity and the mediating tools were the central components.

Second generation activity theory is associated with Leontiev (1978), who expanded Vygotsky's ideas to distinguish collective activity from individual activity, and to distinguish activity from action. As part of this expansion, Leontiev introduced three levels of activity in which collective and individual actions operate in conjunction with motives (which drive the object), goals (which drive actions) and conditions (which ultimately determine operations). The coordination of these levels and their components is best described by using Leontiev's own example of the collective activity of primeval hunting.

Third generation activity theory (Engeström, 1987) is represented visually by a triangle composed of embedded triangles representing various mediating components of the activity system. These components include tools or instruments, subject, object, rules, community, and division of labour (roles), as described in Figure 1 below.

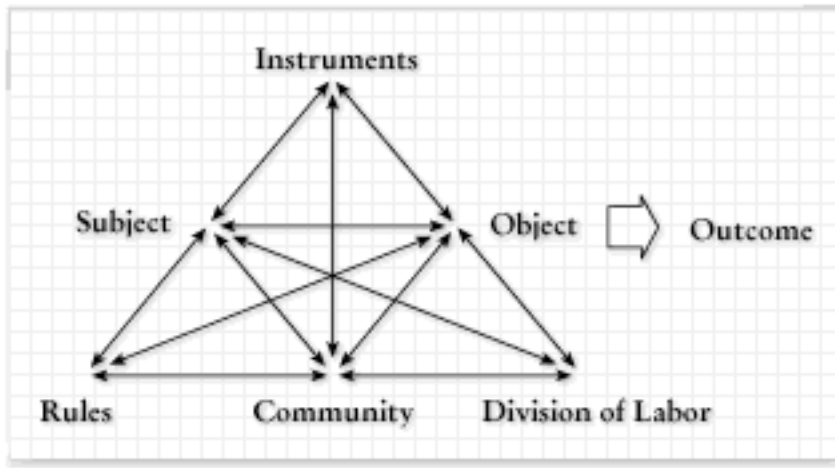


Figure 1. Representation of Third Generation Activity Theory (Engeström, 1987)

In his elaboration of Leontiev's (1978) version, Engeström (1987) focusses on how tensions or contradictions can occur in the activity system between these various components and serve to shape the activity. Tensions and contradictions and the subsequent repositioning within the activity system is not necessarily negative, since the production of these tensions lead to learning. Engeström highlights the transformative potential of the theory, suggesting that expansive learning is a result of conscious repositioning. By understanding contradictions in the system, and understanding the outcomes as a result of the system, it is possible to recognize and adjust to or transform the system. This also speaks to the dynamic nature of activity systems and human behaviour, since it is in these "construction zones" that negotiation and mediation takes place, and therefore learning can occur. Engeström (2001) has taken this further by introducing the concept of boundary crossing where "dialogue, multiple perspectives, and

networks of interacting activity systems” can be understood (p. 135). Engeström (2001) outlines five principles of third generation activity systems, which he describes as:

1. The prime unit of analysis is the “collective, artifact-mediated and object-oriented activity system, seen in its network relations to other activity systems”. Therefore individual action cannot be fully understood without closer examination of the mediated context of which it is a part.
2. Activity systems are multi-voiced, characterized as “a community of multiple points of view, traditions and interests.”
3. Activity systems are shaped and transformed over time, therefore historicity plays an important role in understanding them.
4. Contradictions within and between systems lead to change and development.
5. There is potential for expansive transformations in activity systems

To put this into a DE perspective, I will illustrate these five principles with a more concrete example.

1. An online course serves as a useful unit of analysis. An activity system might consist of online students (subjects) engaged in a collaborative group activity (object). The tools mediating this activity would be the technological options available to them such as the CMS, discussion forum, email, or chat, in addition to language. The community component might involve the instructor or even a guest facilitator. Rules would include the assignment expectations, group

guidelines, and general netiquette. Division of labour would be described by the roles adopted in the group, and the position adopted by the facilitator or instructor.

However, other activity systems in the subject's network might also be examined. If the online course is part of a student's workplace professional development, examination of the workplace system might also reveal interesting information about tensions that occur within or between the systems.

2. In a DE course, the perspectives of students, instructors, and other individuals in the network comprise the multi-voicedness of the activity.
3. In a DE context, the unique and varied experiences the students bring to the online course shape the activity in which they are engaged. For example, a student's prior experience with group activity might collide with another student's understanding of the rules of group activity.
4. A collision of expectations or rules of the activity creates a tension that would need to be negotiated, thereby shaping the development of the activity.

Alternatively, the use of a synchronous tool vs. an asynchronous tool would shape the development of the activity.

5. An expansive transformation takes place when "the object and motive of the activity are reconceptualized to embrace a radically wider horizon of possibilities than in the previous mode of the activity" (Engeström, 2001, p.137). For example, if the group activity involved collaboration on an environmental assessment, but the students subsequently decided to take some sort of definitive

environmental action in their communities, this would represent an expansion of an academic activity into a new activity within a community system.

Third generation AT is particularly valuable in looking at intercultural contexts, where contradictions could be occurring between activity systems, resulting in a “third space” (Gutierrez, Rymes, & Larson, 1995) where new understandings of practices are negotiated. For example, in Basharina’s (2005) recent dissertation, she demonstrated how students from different sociocultural contexts (in this case, Mexico, Japan, and Russia) participating in an intercultural discussion forum activity perceived the object of the activity differently, and therefore initially engaged in different practices that subsequently produced tensions in other areas of the activity system. In our own analysis of an international online teaching experience, we concluded that the level of engagement that some students (adult learners) had in the course activity was related to how relevant the object of the activity aligned to the objects of their workplace activity systems (Belfer, Underhill, & Morgan, 2005). Finally, Thorne (2003) successfully shows that in an intercultural context involving French and American students, the cultural practices that students brought to the use of the internet tools determined how they participated or didn’t participate in that context. As Russell (2001) has observed “learning is therefore not a neat transfer of information but a complex and often messy network of tool-mediated human relationships that must be explored in terms of the social and cultural practices which people bring to their uses of the tools they share” (p. 73).

Nardi (1996) points out that one of the important ideas in AT is that tools or artefacts (such as language and machines) are both created by people and used to mediate activity (p. 38). Therefore, it is not surprising that distributed learning and human computer interaction (HCI), both of which are characterized by the use of computer technologies as learning tools, have found AT to be useful in understanding learning contexts. According to Russell (2001), AT is appropriate to distributed learning and HCI because it provides a way of looking at the relationship of learning and interactions with others as mediated by the cultural tool (computer and computer networks). Yet, in the same way that “artefacts can carry with them a particular culture and history” (Kutti, 1991, in Nardi, 1996, p. 38) it is possible that both students and instructors bring with them culture and history (prior knowledge) to roles. For example, in our own research on teaching in an international context, we looked at how various stakeholders (the instructors and the respective institutions), held different perceptions as to why non-participation was occurring in discussion forum activities. The institution held the view that non-participation was a result of the participants’ inability to adapt from a teacher-centred approach to learning to a learner-centred approach. The instructors felt that the language of instruction was challenging students’ ability to participate fully. This example would be represented as a tension between division of labour or roles, rules, tools, and the object of the activity. Students brought their own prior experiences and knowledge of what the role of the student was (as determined by their own prior practices as students in their academic system, as well as their practices as teachers/professors) to a context where they were being asked to take on a very different role of student (as

established in the rules outlined in the orientation), and were additionally required to participate in second language (Belfer, Morgan, Underhill, 2005).

### ***The use of AT in understanding online teaching***

There are a few examples of research that uses AT to examine the practice of teaching. Scanlon and Isroff (2005) used AT as a framework to understand the experiences of tutors and students in distance higher education context. They propose AT as a framework for the evaluation of learning technology and highlight:

It is clear that students' and tutors' understanding and expectations about the division of labour and rules of the community have a critical influence on the ways in which learning technologies are used. (p. 437)

This is particularly relevant in international online teaching and learning contexts, where different understandings of teaching and learning as a practice are likely to converge, and resonates with Thorne's (2003) study on a French-American telecollaboration which found that students brought different cultures-in-use to the tools of the learning context. Fanghanel (2004) used AT as a framework to look at dissonance between teacher education and novice university teachers' actual practices. She does this by describing the activity system of the novice teacher in training with that of the actual practice setting as interacting activity systems.

Her rationale for the use of AT as a framework parallels my own:

By taking account of the *interactions* between people involved in the activity, *structures* within which the activity takes place, *conventions* on which it is based and *artefacts* used (here, teaching tools and methods), I was able to ground my study in the broad context and capture practice as socially situated, rather than simply evidenced in actions or performance. (p. 579)

Fanghanel's study underlines the how AT could be used to broaden the analysis of the construct of online teaching beyond simply conducting content analysis of discussion forum transcripts to generate conclusions based on categories and frequencies of actions or behaviours.

#### *Situated learning (SL) and legitimate peripheral participation (LPP)*

The strength of AT for looking at online teaching and learning contexts is that it can provide a structured way of looking at the contexts in which our actions are situated and how certain components of that context are mediating the activity. In understanding where tensions and contradictions are occurring, the subject can possibly exercise some agency to transform the activity. What AT doesn't seem to address is what happens when contradictions in the activity system lead to marginalization, or departure of subjects in the activity system. In order to have an understanding of the dynamic nature and struggles of participation in a social context, Lave and Wenger's (1991) concepts of



legitimate peripheral participation (LPP) and situated learning (SL) provide a useful analytic framework. According to this framework, learning is situated in communities of practice and continually involves a process of legitimate participation that moves from the periphery to the centre. In this way, learning is “an evolving form of membership” in communities of practice (COP) (Lave & Wenger, 1991, p. 53). At the same time, a COP can be a site of struggle, where issues of power and access to resources influence the degree of legitimacy and participation that is possible. Since SL and LPP are focussed on engagement and participation in communities of practice it provides some conception of the relation of distances between participants in a community of practice and their trajectories of becoming legitimate participants.

Importantly, in Lave and Wenger’s (1991) view, LPP provides a way of describing how participants evolve in their participation in COPs over time:

Peripherality suggests that there are multiple, varied, more or less engaged and inclusive ways of being located in the fields of participation defined by community. Peripheral participation is about being located in the social world. *Changing* locations and perspectives are part of actors; learning trajectories, developing identities, and forms of membership. (p. 59)

However, they note that participation is also closely tied to power, where changing locations of peripheral participation can be empowering if the participant is able to move to a more legitimate position, but disempowering (and marginalizing) if participants are

kept from legitimately participating. This is especially relevant to online teaching and learning contexts where categories of visible participants (those who are active in the discussion forum), read-only participants or lurkers (those who log in and actively read postings, but don't actually post), and non-active participants (those who don't log in to the course) are used to characterize participation (e.g. Beaudoin, 2002; Nonneke & Preece, 1999). It therefore becomes important to clarify whether read-only participants could be considered legitimate, or are, in fact, marginalized.

Central to SL is the notion that the presence of newcomers and old-timers characterize COPs. Newcomers are considered legitimate peripheral participants, since although they may not be participating very much initially, they move from peripheral to centre participation in the course of the learning process. This process might be a site of struggle involving dynamics of power and identity. Using a case of butchers in a supermarket, Lave and Wenger (1991) are able to illustrate the complex power relations that are at play between those who are positioned as newcomers and those who are positioned as old-timers. According to Lave and Wenger, "Newcomers are caught in a dilemma. On the one hand, they need to engage in the existing practice, which has developed over time: to understand it, to participate in it, and to become full members of the community in which it exists. On the other hand, they have a stake in its development as they begin to establish their own identity in its future" (1991, p. 115). This notion is interesting, since in formal learning contexts instructors are often positioned as the experts, but constructivist approaches to the design of online courses attempt to provide

opportunities for students (usually through group work) to take on the role of an expert, or, in Lave and Wenger terms, to move from peripheral to more central participation.

Lave and Wenger are careful to point out that language is a factor in determining whether participants can participate legitimately: “The importance of language should not be overlooked. Language is part of practice, and it is in practice that people learn” and “issues of motivation, identity, and language deserve further discussion”(p. 85).

Scholars such as Tusting (2005) have highlighted the connection between language and power in COPs, noting that the dynamics of participation is better understood if the role of language in the negotiation of meaning and in the social dynamics of the COP is addressed more closely. Although online students and instructors aren’t necessarily language learners (or have language learning as the primary object of their activity), in an international context it is not unusual to have students participating in their second or third language, and in doing so, are potentially investing in the target language, and thus investing in their own social identity (p. 18). To return to my previous example of our experience as instructors in an international teaching context (Belfer, Morgan, & Underhill, 2005), we were aware of the importance of trying to create a space where the students would feel comfortable participating with us, despite the fact that as instructors teaching in English to a cohort of academics for whom English was a second or third language, we might have represented an authority in which they had a particular “symbolic or material investment” (Norton, 2001, p. 166).

### *How AT and SL are different*

At first glance it is difficult to understand how AT and SL differ—both have roots in Vygotsky, and both function as a conceptual framework for looking at socially mediated learning. In both frameworks ‘resources’, ‘subjects’ and ‘community’ are components, and therefore provide a way of looking at learning contexts. Like AT, SL is a complex notion that encompasses the dynamic nature of cultural historical practice and the importance of resources to this practice, but provides an additional perspective on issues of identity, power, and participation in communities of practice. What Lave and Wenger define as a community of practice--“a set of relations among persons, activity, and world, over time and in relation with other tangential and overlapping communities of practice” (1991, p. 98)--is similar to AT’s notion of an activity system.

In a comparative analysis of Activity theory, Situated Action Models, and Distributed Cognition, Nardi (1996) is able to shed some light on the differences between AT and SL. Situated Learning is concerned with looking at the activity of people in their environment, with the idea that people’s actions aren’t always directed by goals or objects. In AT, a unit of analysis is the activity system, and for this activity system to exist there must be a goal or an object. Therefore, according to Nardi, what distinguishes AT (and Distributed Cognition) is the fact that the system is goal or object oriented.

Edwards (2005) offers a different interpretation of what distinguishes the two frameworks. The Russian cultural psychology school that is associated with AT (Engeström, 1987; Vygotsky, 1978; Leontiev, 1978) gives more emphasis to how society

and the collective shapes the self. In contrast, the American school (Lave, 1988; Greeno, 1997) describes how the individual actor adapts to various social situations (p. 56). In Edwards' view, Lave "encourages us to fix our analytic lenses on the structuring environment and how it produces or allows certain ways of participating and the construction of particular identities" (p. 57). While acknowledging the value of Lave and Wenger's (1991) work, Edwards offers the critique that while the community of practice metaphor tells us how learners are socialized into existing beliefs and practices, it fails to account for how new knowledge is produced and doesn't describe what is learnt, but only what is done in the practice (p. 57). In her view, Engeström's (1987) idea of expansive learning is better suited to responding to this question.

Linehan and McCarthy (2000) both agree with and challenge the notion that the individual self should not be the starting point for an analysis of participation, arguing that "to adequately theorise participation in social settings, we need a dialogue between individual selves and communities of practice as our starting point" (p. 439). I concur with this position—it is not sufficient in our view to look only at how the social setting constructs online teaching, since instructors as individuals bring to the activity their own histories and identities, their own memberships in other communities of practice, that also serve to shape their participation as instructors in teaching and learning contexts.

### ***Extending AT and SL***

AT and SL help us to understand how the components of the context interact (AT) and the process of participation in the practice context (SL). However, in my view, neither of these frameworks provides the complete picture of all of the potential dynamics in an online teaching context. For this reason, I think it's important to examine socioculturally defined concepts of positioning and identity in discussions about online teaching.

### ***Positioning and identity***

Although SL is useful for understanding that there are multiple locations within a community of practice, and that learning involves movement within trajectories of participation, and social identities and power have a role in this movement, both AT and LPP fall short of accounting for how individuals or collectives position themselves within these communities and negotiate this positioning. For example, it is reasonable to assume that most instructors arrive in the teaching context with at least some professional identity that has been constructed through experiences in other practices. At the same time, the members of the community (in this case the students) have some notion of the practice of learning and the positioning of themselves in relation to an instructor in that practice. Therefore, dynamics of positioning and identity are already at play at the entry stages of an online teaching context, and I believe that at this point a negotiation of positioning and

of identities will begin. This is not to say that students and instructors will share similar views of these roles—it is reasonable to assume that in some cases there will be conflict. For example, an instructor who takes a student-centred approach with students who position the instructor as expert and provider of knowledge, will likely engage different tensions and contradictions in the activity system than an instructor who takes an authoritarian approach with students who are accustomed to this approach.

According to Davies and Harre (1990), the concept of positioning attempts to describe how we relate ourselves to our contexts. Engeström (2001) states that the division of labour itself creates different positions for the participants, and these are governed by the “multiple layers and strands of history engraved in its artifacts, rules and conventions” of the activity system (p. 136). In Linehan and McCarthy’s (2000) view positioning “is a useful way to characterise the shifting responsibilities and interactive involvements of members in a community” when looking at particular practices (p. 441). They shed some light on how the concept of positioning can provide some expansion of current understandings of sociocultural theories and frameworks. They categorize two approaches to viewing positioning in relation to sociocultural frameworks. The first, social practice and activity, is built on the assumption that social structures precede activity, thus individuals act into social structures (eg. Bourdieu, 1990 and Lave & Wenger, 1991). The second category describes a more individual-centred approach whereby selves are constructed discursively (Davies & Harre, 1999). This process can be either interactive (one person positions the other in discourse) or reflexive (one positions oneself in the discourse). Linehan and McCarthy argue that despite the different

foundations of these two approaches, they aren't incompatible to describing an individual's participation in a social setting.

In Linehan and McCarthy's view communities of practice are locations of discursive positioning practice since they are "an institutionalised use of language and language-like systems". Importantly, Linehan and McCarthy illuminate Lave and Wenger's description of identity in COPs, by suggesting that how we position ourselves and are positioned by others ultimately influences our trajectory within the community of practice. In other words, discursive positioning is also a component of identity negotiation and construction in communities of practice. As Linehan and McCarthy explain, both students and teachers have a certain degree of agency in how they can position themselves discursively and reflexively in the community, but ultimately these are limited to the cultural historical expectations of the community in which "selves are maintained and transformed dialogically through relationships with others, in which some ways of being are facilitated and others constrained" (Linehan & McCarthy, 2000, p. 442). They also suggest that the concept of positioning works interdependently with the notion of identity in COPs, in that identity is seen to be developed through "active positioning in relation to, or perhaps in opposition to, elements in their discursive cultural context" (p. 449).

I concur with Linehan and McCarthy (2000) that the concept of positioning is useful in providing a lens with which to analyze the "dynamic relations" between members of the COP and current understandings of how certain practices and identificatory possibilities are enabled or constrained within the practice setting (p. 449).



As van Langenhove and Harre (1998) explain, the concept of positioning is “a dynamic alternative to the more static concept of role” (p. 14), and resides in a different ontological paradigm. Therefore, I understand positioning to be a useful construct in a study that attempts to go beyond describing online teaching in terms of roles.

### ***Identity***

At this point it becomes important to clarify what could be meant by identity in relation to teaching and learning contexts. As Sfard and Prusak (2005) have noted, operational definitions of identity are hard to find, and the word *identity*, although now widespread in educational discourse, is rarely preceded by an explanation of the term. Lave and Wenger (1991) do not provide much explanation of their notion of this concept, but Wenger himself provides more detailed elaboration in a later publication (1998). Participation in Wenger’s (1998) view encompasses the process of actively participating in the practices of the community and constructing identities in relation to the community of practice. In other words, through participation in practice settings we construct identities. However, Wenger is not proposing an individualistic view of identity—in his view identity is constructed through defining oneself in communities of practice, where negotiation of meaning and our membership in the communities occurs on both a social and an individual plane. According to Wenger, the process of becoming and identity negotiation are interrelated, in that “a sense of trajectory gives us ways of sorting out

what matters and what does not, what contributes to our identity and what remains marginal” (p. 155).

Research in the area of second language education, and more specifically, TESOL, is useful in trying to understand how identity should be defined in relation to online teaching contexts. Researchers such as Norton (2000), Duff and Uchida (1997) and Varghese et al. (2005) have explored the sociocultural and socio-political dimensions of ESL teachers and students, and in particular how the identities of the teachers and students is a critical component in shaping the teaching context (c.f. Vandrick, 1999; Norton, 1997). Varghese et al. (2005) summarize the current thinking on dimensions of language teacher identity as having the following threads:

1. Identity has multiple constructions, is constantly shifting, and involves conflict and struggle. Agency is an important component of identity formation;
2. Identity is closely tied to the social, cultural, and political context in which it is located;
3. Language and discourse mediate the construction, maintenance and negotiation of identity (p. 22).

Norton (2000) defines identity as “how a person understands his or her relationship to the world, how that relationship is constructed across time and space, and how the person understands possibilities for the future” (p. 5). These definitions of identity, and those of other theorists such as Bucholtz and Hall (2005), and Holland,

Lachicotte, Skinner, and Cain (1998) appear to encompass the concept of positioning, making it difficult to operationalise and distinguish between the two constructs. For example, Bucholtz and Hall (2005) define identity as “the social positioning of self and other” (p. 586), while Holland et al. (1998) distinguish between positional and figurative identities. For Holland et al. “positional identities have to do with the day-to-day and on-the-ground relations of power, deference, and entitlement, social affiliation and distance—with the social-interactional, social-relational structures of the lived world” (p. 127). Their explanation of figurative identities “stories, acts and characters that make the world a cultural world” (p. 127) share some characteristics with the idea of “storylines” proposed by positioning theorists Harre and van Langenhove (1998).

Discussions of identity within an Activity Theory perspective are rare, since, as Stetsenko and Arievidt (2004) point out, activity theory has neglected the ‘self’ in favour of the ‘collective’. Therefore, Stetsenko and Arievidt (2004) focus their attention on the “self” is and how it is constructed within activity. Although they acknowledge the contribution of Cole and Wertsch (1996) in attempting to address the dichotomous tension between individual and social within activity theory, they nonetheless emphasize the importance of further elaboration of the self to inform the social and individual planes of activity within an activity system. According to Stetsenko and Arievidt, current understandings of activity theory (eg. Engeström 1987, 1999) focus largely on “the *collective* dynamics of shifting divisions of labor, roles, mediating artefacts and rules of participation, whereas the role that individual psychological processes might play in this dynamic is relatively neglected” (2004, p. 479). In other words this view does not focus

“on how particular selves are produced, or on the active role that the self might play in the production of discourse, community and society itself” (p. 479). Their view is for a view of self that leads activity, which “captures the idea that the self is not separate from other activities that individuals conduct and engage in, but instead is inherent in the totality of a person’s life” (p. 496). It is “simultaneously social and deeply individual” (p. 497). Similarly, Kaptelinin and Nardi (2007) also adopt an activity theory perspective that highlights the importance of the individual as distinguishable from the other nodes in the system by virtue of the fact that:

- (a) they have their own needs and reasons to do things that go far beyond the specific activity they are involved in, and (b) they reflect on and make sense of the collective activity and their own actions. (p. 10)

I interpret this to be a confirmation that understanding the identities and the positioning of self/subjects that are brought to the activity system is as important as understanding how identities and positions are transformed and negotiated in practice. This view is particularly relevant to an activity theory guided understanding of the negotiation of online teaching.

### *Identity and Imagined Communities*

Norton Peirce (1995) has broadened the discussion of identity by introducing the notions of investment and imagined communities. The term references Benedict Anderson’s (1991) original concept of a nation, whereby a nation "is imagined because

the members of even the smallest nation will never know most of their fellow-members, meet them, or even hear of them, yet in the minds of each lives the image of their communion" (Anderson, p. 6). Norton Peirce describes imagined communities in relation to the learning trajectories of individuals who have a certain investment in an 'imagined' community of practice for which they are not yet legitimate participants, but to which they want to belong. Through cases of adult immigrant women in ESL classes, Norton Peirce illustrates that when formal ESL contexts are seen to be misaligned with the investments that non-native speakers have in their target imagined communities and the practices associated with those communities, this can result in non-participation and withdrawal. Therefore understanding where learner's investments lie, in relation to their identities, is valuable when trying to analyze activity systems and participants in their communities of practice (COPs). Again, Kaptelinin and Nardi (2007) seem to be describing a similar idea using the language 'motives' and 'intentions'. They note: "Even though human motivation is profoundly influenced by culture and society, each individual has her own hierarchy of motives" (p. 11). They use the example of workplace organizations where "dealing with individuals and their needs and capacities becomes part of the activity in an organization" ...the individual has his own reasons for choosing to participate or not to participate in the organization, his own motives and intentions" (p. 11). Interestingly, Holland et al. (1998) also touch upon the notion of imaginary in relation to identity, highlighting that "identity responds to both the imaginary and the embodied communities in which we live" (p. 192).

Fox (2004) adds to the discussion on imagined community by invoking a construct of imagined community that includes both physical and virtual community. In a pilot study, he provides evidence that participants construct imagined understandings of both physical and virtual communities. Fox doesn't explain how conceptualizations are situated within a cultural historical trajectory—his CEM model represents the present where a person's location in practice is both simultaneously physical and virtual.

In referring to how prior knowledge and experience can shape our practices in virtual and physical communities Fox (2004) states “our conceptions of both physical and virtual communities are fuelled primarily by our imaginative spaces” (p. 53). Unfortunately what is not addressed in this model is how membership in multiple online communities intersect—he presents a dichotomy between virtual and physical, but in this regard the concept of “knotworking” (Engeström, 2001) is more robust and better able to address the complexity of actual practices, whether they are physical or virtual.

The concept of imagined communities is potentially useful in distance teaching and learning contexts in particular within an activity theory framework. In my view, Norton Peirce's (1995) understanding of imagined communities and investments in relation to identity could be seen as operating at the motives and goals level of Leontiev's (1978) version of AT, where both the collective and the individual could be acting towards a goal that is tied to an investment in an imagined community. For example, while teaching presence constitutes the primary activity, an instructor's motive of obtaining good teaching evaluations in order to achieve tenure (and therefore gaining access to the “tenured professor” community) would potentially shape this activity than

an instructor with different motives and goals. However, regardless of whether an activity system or community of practice view of online teaching contexts is adopted, identity, positioning, and imagined community are important concepts, since they speak to the multidimensional nature of the subjects, and recognize that the sociocultural experiences that are brought to the teaching context serve to shape the practice itself, and in turn be shaped by the practice. Sfard and Prusak (2005), in their attempt to operationalize identity, argue that the notion of identity is “the missing link” in sociocultural theory which struggles to describe “ the complex dialectic between learning and sociocultural context” (p. 15).

#### *Research on teacher identity*

While some theorists (such as Kanno and Norton, 2003) have argued that looking at identity in context gets around the problem of categorizing the multiple types of identities that might be at play in a context (eg. Social, political, cultural, professional), there is a body of research that has explored teacher identity specifically. Twiselton (2004) looked at the teacher identities of student teachers in relation to activity theory and explains:

Teacher identity can be viewed as a central, dynamic force that appears to have an impact on the way the student teachers interpret classrooms and leads them to manage and shape the activity systems in which they operate (p.159).

In this view, identity is shaped by and shaping the social practices. She situates identity in relation to activity theory by describing activity theory as “ an analysis of the social practices of the communicative environments in which teachers’ identities are (per)formed and the differences in these practices between settings” (p. 160). This idea is especially relevant to DE contexts where instructors’ past, present and future teaching practices often shift between face-to-face and online contexts.

Singh and Richards (2006) focus specifically on teacher identity and suggest that identity is socially constructed as well as brought to the classroom serving to shape the practice setting: “we therefore see teacher identity as ‘woven’ through the ideologies, discourses, contents and approach of the course, and the individual teacher’s own desire to find meaning in becoming a teacher” (p. 152). They note the lack of research on “how teachers negotiate their identity through the interaction processes of the course room” (p. 156). In particular:

The acknowledgement of the internal struggles and dilemmas teachers are confront with when challenged to take on new practices, which may require the teacher to assume new identities and a changed mindset. Whether teachers have the agency to remake themselves through repositioning within the course room will determine if they engage with or resist the activities and discourses of a course. (p. 156).



Although Singh and Richards (2006) focus their lens on the course room itself, their view somewhat echoes Duff and Uchida's (1997) study of the negotiation of identity by teachers of English in Japan.

## **Summary**

In embarking on a research project that seeks to gain a sociocultural perspective of teaching presence—currently defined by Anderson et al. as “the design, facilitation, and direction of cognitive and social processes for the purpose of realizing personally meaningful and educationally worthwhile learning outcomes” (Anderson, Rourke, Garrison, Archer, 2001, p. 5)—I find that both of the frameworks outlined in this paper provide relevant ideas on which to build.

Cultural historical activity theory provides a way of looking at the looking at complex contexts of online teaching activity without ignoring that the unit of analysis—the activity system—is a dialectic between viewing the system as a whole and from the perspective of a subject (or multiple subjects' perspective of the activity) (Engeström & Miettinen, 1999, p. 10). I have argued that the categorical descriptions of the community of inquiry framework (Garrison, Anderson, & Archer, 2000) do not take into account the diversity of contexts and tensions at play within those contexts, and the historical nature of the practice. As Engeström and Miettinen (1999) have stated “the study of an activity system becomes a collective, multivoiced construction of its past, present, and future

zones of proximal development” (Engeström, 1987, in Engeström & Miettinen, 1999, p.10).

Situated learning and legitimate peripheral participation is a useful framework for gaining a better understanding of the dynamic relations of participants in the social practice. I find the notions of expert versus newcomer, and legitimate participation versus marginalization, are useful in a teaching context where instructors have been historically positioned as experts, and where participation in a community of inquiry is usually an aspect of the course design, therefore requiring both instructors and students to engage in this practice or activity.

I also suggest that the notions of positioning and identity, the latter of which is addressed to some degree in Wenger (1998) are relevant to a research project that looks at the negotiation of teaching presence in online contexts. The challenge is then in situating positioning and identity within these frameworks. For example, within an AT framework, is identity an outcome, as it is in Lave and Wenger’s (1991) conception of communities of practice, or is it a tool? Are identity and positioning object-producing activities or subject-producing activities that occur tangentially in an online teaching context?

In order to proceed with these frameworks, it is necessary to establish some assertions to operationalize the negotiation of teaching presence.

1. How instructors position themselves and are positioned will influence their teaching presence.

2. Instructor identities will influence and will be influenced by their teaching presence.
3. The dynamics of the activity system and its mediating components will influence and be influenced by teaching presence.

For the purposes of this study, I follow Linehan and McCarthy's (2000) differentiation of positioning and identity, where positioning is understood to be a component of identity negotiation. I follow Davies and Harre (1998) and adopt a discursive view of positioning defined as "how we relate ourselves and others to a specific context" (the online teaching and learning context that forms the unit of analysis for this study). Furthermore, I am recognizing that certain contexts (e.g. Teaching) will privilege and bring to the fore certain identities specific to that context since subjects position themselves in relation to those contexts.

## CHAPTER 3:

### RESEARCH METHOD

#### **Introduction**

In embarking on a research project that seeks to gain a sociocultural perspective of teaching presence, cultural historical activity theory (Engeström, 1989, 1999, 2001) is particularly relevant. AT provides a way of looking at the complex contexts of online teaching activity and identifying tensions and contradictions that occur between the mediating components of the activity system. As a unit of analysis, an activity system also provides a way to view the practice from a subject's or multiple subjects' perspectives (Engeström and Miettinen, 1999, p. 10). In this chapter, I will outline the methodology that was adopted in this study to investigate teaching presence within a sociocultural framework.

#### **Research Questions**

For the purpose of this study I adopted Anderson et al.'s definition of teaching presence as "the design, facilitation, and direction of cognitive and social processes for the purpose of realizing personally meaningful and educationally worthwhile learning outcomes" (Anderson, Rourke, Garrison, Archer, 2001, p. 5). In adopting a sociocultural framework I am viewing teaching presence as a negotiation and a practice that occurs

within a community of inquiry characterized by constraints and affordances. Therefore, in order to gain a better understanding of a sociocultural perspective of teaching presence, I investigated the following research questions:

1. How do online instructors negotiate their teaching presence in online contexts?
2. What are the constraints and affordances that influence this negotiation?

### **The activity system in relation to the community of inquiry**

In an AT framework, the community of inquiry is conceived as the object of an activity system, whose ultimate goal is student learning. Therefore instructors as subjects and students as subjects are directing their efforts towards student learning in a community of inquiry. Community of inquiry describes to some extent what this directed effort encompasses—social presence, cognitive presence, and teaching presence—in order for learning to happen. However, as I have argued, it doesn't adequately describe the negotiation that takes place in achieving this object, which is why activity theory is particularly useful.

In this study, the activity system is viewed from the perspective of the instructor in which the object of instructor activity is teaching presence, with an outcome of community of inquiry. Figure 2 provides a visual description of the activity system of instructors engaged in teaching presence.

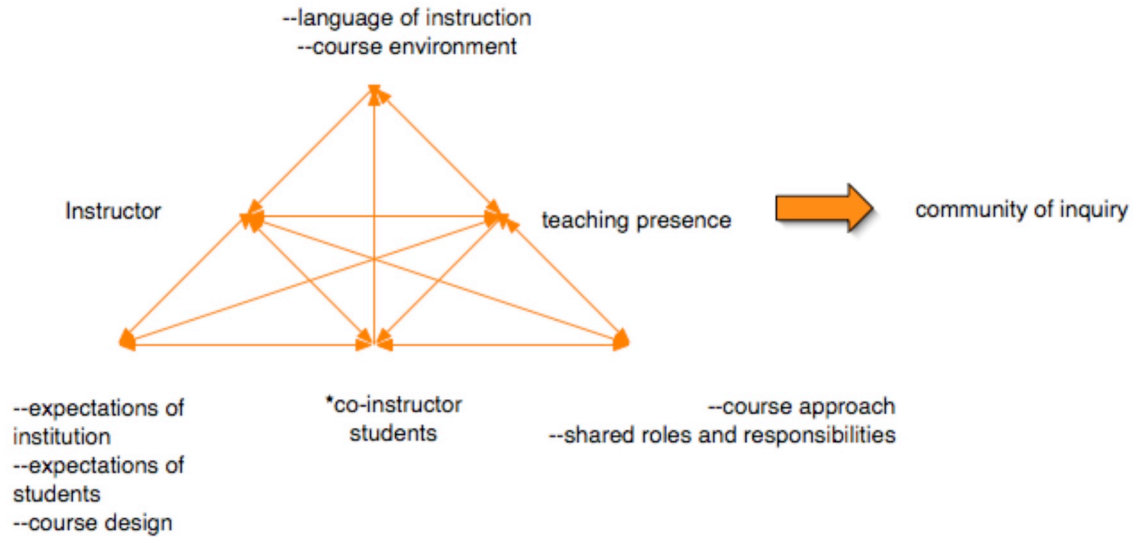


Figure 2. Instructor activity system

## Explanation of Terms

### *Presence vs. online teaching*

This study makes an important distinction between the notion of “teaching presence” and “online teaching”. Presence in online contexts recognizes the importance of being there, however banal, and in online contexts where physical presence is currently only manifested through interaction, this becomes an important distinction. In this sense presence allows for the fact that not all interaction with students and within the

context is necessarily “teaching”. In other words, “presence” suggests that the participation or non-participation of the instructor serves to influence the community of inquiry.

Although teaching presence can be performed by anybody in the activity system community, the focus of this study is on the teaching presence of the instructor, since the position of instructor itself engenders a different set of power relations and cultural historical understandings. In other words, as Linehan and McCarthy (2000) have noted “both students and teachers have a degree of agency in how they position themselves in interactions but this agency is interlaced with the expectations and history of the community” (p. 442).

As outlined in Chapter Two, this study adopts the following assertions to operationalize the “negotiation of teaching presence”:

1. How instructors position themselves and are positioned will influence their teaching presence.
2. Instructor identities will influence and will be influenced by their teaching presence.
3. The dynamics of the activity system will influence and be influenced by teaching presence.

### ***Distance education***

In this study, I use the term distance education to describe the physical separation of students and instructor/s in the teaching and learning context. Specifically, the teaching and learning contexts discussed in this study constitute online spaces, where communication between students and instructors was entirely computer-mediated.

### ***Interaction spaces***

I use the term “interaction spaces” to designate the spaces in which any type communication between students and instructors took place. In this study, these spaces used either CMS discussion forum or weblog technologies.

### **Procedures**

I adopted a qualitative multiple case study approach (Stake, 2006) of six cases of teaching presence of online instructors teaching in international contexts at the tertiary level. By international, I am referring to teaching contexts where the instructors and the students do not share the same sociocultural context, as defined by language of instruction and national boundaries.



### ***The qualitative research paradigm***

I identify with the assumptions associated with the qualitative paradigm, which Denzin and Lincoln (2005) describe as “the socially constructed nature of reality, the intimate relationship between the researcher and what is studied, and the situational constraints that shape inquiry” (p. 10). Merriam (1998) has alternately described this paradigm in terms of what interests qualitative researchers, specifically, understanding people’s experiences in the world, how they make sense of these experiences, and the meaning they have constructed (p.6).

Within the qualitative paradigm, Denzin and Lincoln (2005) locate four major interpretive paradigms, of which the constructivist paradigm (as described by Denzin and Lincoln, 2005) is most congruent with my research goals and questions. According to them, the interpretive framework that guides this constructivist paradigm is characterized by the following:

- relativist ontology
- subjectivist epistemology
- naturalistic set of methodological procedures (p. 24)

A relativist ontology assumes that there are multiple realities, while a subjectivist epistemology is an understanding that the knower and the respondent co-create

understandings. Naturalistic procedures are ‘real world’ methods that don’t attempt to isolate and control variables (p. 24). In other words, this type of research occurs in a natural setting and not in an artificially controlled setting.

Creswell (2003) provides a useful elaboration of the constructivist paradigm, which he identifies more specifically as a social constructivist paradigm. In his view, there are four defining features of this paradigm: a focus on understanding; the existence and inclusion of multiple participant meanings; social and historical construction; and theory generation. Building on Crotty (1998) Creswell illustrates the assumptions underlying constructivism and their related strategy, which I have repositioned in the table below:

Table 1. Assumptions and Strategies Underlying the Constructivist Paradigm

Assumptions	Strategy
People construct meaning through engagement with the world	Researchers employ open ended questions to allow participants to express their views
People make sense of the world through their own historical and social lenses	Researchers seek to understand the context and settings of the participants, through observing the context and making their own interpretations
Meaning is socially derived, constructed through interaction with other people	Research is inductive, researchers generate meaning through data collected in the field.

### ***Multicase study design***

Having located a study on online instructor presence within an interpretive, constructivist paradigm, it becomes important to identify a research design and a strategy of inquiry that is most appropriate for the research questions. According to Denzin and Lincoln (2005), a research design “describes a flexible set of guidelines that connect theoretical paradigms first to strategies of inquiry and second to methods for collecting empirical materials” while “ a strategy of inquiry comprises a bundle of skills, assumptions, and practices that the researcher employs as he or she moves from paradigm to the empirical world...strategies of inquiry also connect the researcher to specific

methods of collecting and analyzing empirical materials” (p. 25). In the previous chapter, I identified cultural historical activity theory (AT) as useful guiding theoretical framework. The choice of this theoretical framework has certain implications in defining the strategy of inquiry, since the AT framework is distinguished by its focus on a unit of analysis that extends beyond an individual acting in a context. AT emphasizes the importance of an activity system and the processes within the activity system as a unit of analysis, and the need to understand the dialectic between context and subjects within an activity system. I feel that the assumptions that underlie the social constructivist paradigm complement the AT theoretical framework in that the activity system provides a way of accounting for and understanding multiple perspectives of the experience and the cultural historical nature of the practice. Furthermore, it is useful to note that the characteristics of case studies, described by Snow and Anderson (1991) as “relatively holistic analyses of systems of action that are bounded socially, spatially, and temporally; they are multiperspectival and polyphonic...they allow for the observation of behaviour over time...”(p. 252) could almost be describing the characteristics of AT itself. Therefore, the constructivist paradigm and case study strategy are complementary and congruent with a study that employs AT as a theoretical framework.

### ***Defining case study research***

There are many possible definitions of case studies, which are further confused by the fact that case study research is alternately positioned as a design and method (Yin, 1989), a methodology (Merriam, 1998), an object of study (Stake, 1995), and “an exploration of a bounded system” (Creswell, 1998, p. 61). Merriam also adds that case studies can be defined by the product or end report (p. 43). Furthermore, according to Stake (2005) a “case study is not a methodological choice but a choice of what is to be studied” and “as a form of research, case study is defined by interest in an individual case, not by the methods of inquiry used” (p. 443).

For the purpose of my research, I identify most strongly with Yin’s (1989) definition of a case study, which he defines as an “empirical inquiry that investigates a contemporary phenomenon within its real life context; when the boundaries between the phenomenon and context are not clearly evident; and in which multiple sources of evidence are used” (p.23). In the case of a study on online teaching, within a sociocultural framework the phenomenon under investigation (teaching presence) and the context are encompassed in the unit of analysis—the activity system. Instructor presence becomes the object or practice of the activity system of the instructor, and the context itself will define that practice. For this reason, it is beneficial to look at multiple cases in multiple contexts to gain a better understanding of the phenomenon within these various contexts.

### ***Multicase study and cross case analysis***

Although some scholars argue that the strength of single case studies are diluted when multiple cases are studied and compared, there is some agreement that studies that look at multiple cases and perform some sort of cross-case comparison provide a strength to the research. Merriam (1998) suggests that multiple case studies can provide a more “compelling interpretation” in that a greater variation of cases can be examined. Miles and Huberman (1994) argue that multiple cases provide a way of strengthening “the precision, the validity, and the stability of the findings” (p.29). Yin (1984) is more cautious, highlighting that while multiple case designs have an advantage of creating a compelling study that appears more robust, the rationale for using a critical case, rare case or revelatory case cannot be met in a multiple case design (p.53). Stake (2006) notes that multicase research is the wrong design if the situational uniqueness of each case is more important than the “Quintain”, or the phenomenon of interest (the “case of”). Therefore, the rationale for case selection is very important in multicase research design.

For Stake (2006), “an important reason for doing the multicase study is to examine how the program or phenomenon performs in different environments” (p. 23). He lists three main criteria for selecting cases in a multicase study:

1. is the case relevant to the phenomenon being studied;
2. do the cases provide diversity across contexts;

3. do the cases provide good opportunities to learn about complexity and contexts (p. 23).

For Yin (1989) multiple case studies and single case studies are not a different in methodology, only research design. He provides a useful illustration of the design where cross case analysis is merely an additional step added to the individual analysis of each case (p. 57). Creswell (1998) provides a similar description of procedure, beginning with what he calls “within-case analysis” or description and analysis of each case, followed by cross-case analysis, which involves a thematic analysis across the cases “as well as assertions or an interpretation of the meaning of the case” (p. 63).

Stake (2006) provides very detailed suggestions for multicase procedures, offering useful guidelines and worksheets for each of the different stages. He suggests beginning with themes or research questions, and then looking at each case for prominence of the themes while reflecting on the expected utility of each of the cases for developing the respective themes. He also suggests three tracks for developing assertions from cases: Track 1, where the various situations and findings of the individual cases are emphasized; Track II, where findings are merged across cases, and the priority is not on the situationality of the findings; Track III, where clusters of important factors pertaining to each theme are sorted and ranked. Following this procedure, cross case assertions are then developed.

Miles and Huberman (1994) emphasize that multiple case studies require clear choices about what cases to include as well as clear within-case sampling, since cross-

case comparison is impossible if researchers are working in different settings, focussing on different processes (p. 33). Stake (2006) has a somewhat different view—for him, one of the goals of cross-case analysis is to demonstrate not only what is common across cases, but what is different, and notes that this is something that is often overlooked (p. 39). In his view, cross case analysis is undertaken to understand the phenomenon as it appears across several cases. This statement reflects most accurately my own purpose for conducting cross case analysis of online teaching presence.

Additionally, the value of a multiple case study approach in conjunction with AT as a theoretical framework has been underlined by Edwards (2005) who states: “different activity systems can develop new interpretations of the object and reveal new meanings through their own questioning of the histories and rules that shape them and through exploring the potential meanings inherent in the object” (p. 61).

Creswell (1998) describes the multicase study procedure as beginning with what he calls “within-case analysis” or description and analysis of each case, followed by cross-case analysis, which involves a thematic analysis across the cases “as well as assertions or an interpretation of the meaning of the case” (p. 63). This is similar to the procedure outlined by Stake (2006) and is the one that I adopted for this research.

### ***Sampling and selecting cases***

Case study research involves selecting cases and then sampling within the case. Miles and Huberman (1994) describe this procedure as bounding the case; making



decisions about what settings, actors, events and processes to observe. They distinguish between general sampling strategies, which are decisions about selecting the case, while within case sampling is centred on what data to look at within the case. Merriam (1998) also makes a similar distinction between selecting the case, and sampling within the case.

Creswell (1998) recommends first deciding what type of case study is most appropriate—single or collective, multi-sited or within-site, intrinsic or instrumental (p. 62). Once this decision is made, cases are selected using purposive sampling, of which his own preference is to “select cases that show different perspectives on the problem, process, or event I want to portray, but I also may select ordinary cases, accessible cases, or unusual cases” (p. 62). In contrast, Stake (2005) simply claims that the most important criteria for selection is what can be learned from the case.

### ***Cases and the use of theory***

Qualitative research either implicitly or explicitly is guided by theoretical frameworks, since, as Merriam (1998) has noted, even with more grounded approaches which introduce theory at the end, research is designed within some disciplinary orientation which is itself defined by its own conceptual frameworks (p. 45). Different case study scholars are more or less extreme in their views as to how or whether case studies should be guided by theory. For example, Miles and Huberman (1994) argue that a conceptual framework can tighten the qualitative research design. Yin also argues quite strongly for the use and importance of theory—for Yin, case studies should be designed

with the goal of theory building in mind. In contrast to grounded theory, Yin (1989) states:

A good case study investigator should make the effort to develop this theoretical framework, no matter whether the study is to be explanatory, descriptive, or exploratory. The use of theory, in doing case studies, is not only an immense aid in defining the appropriate research design and data collection, but also becomes the main vehicle for generalizing the results of the case study. (p. 40)

Creswell (2003) doesn't argue for one approach more than the other, but only notes that in qualitative research, there is an increasing use of theoretical lens or perspective to guide the study (p.131) as opposed to inductive approaches to research where theory is introduced at the end. However he cautions against an approach that forcefully tries to squeeze data into an existing framework, reminding us that theories can be modified and adjusted based on the data, and that this approach is in fact "consistent with the emerging design of qualitative inquiry" (p. 134). This view is also consistent with Ragin (1997) who cautions against case study research that uses predictive models to explain all of the cases (p. 39).

### *Case study methods*

Case study scholars agree that case study methods might use any one or more of the following: interviewing, observations, and analysis of documents. Merriam (1998) even states that case study research can use any methods, since unlike other traditions, case study research does not claim any specific methods (p.28). Creswell (1998) shares this view, and provides an extensive list of qualitative data collection approaches available to case study researchers (p. 121). He notes that of all the qualitative research traditions, case study “involves the widest array of data collection as the researcher attempts to build an in-depth picture of the case” (p. 123). Yin (1989), on the other hand, is more specific in that case study research itself is defined by the use of multiple methods (1989). In addition to describing six sources of evidence (documentation, archival records, interviews, direct observations, participant-observation, and physical artefacts) he provides three overriding principles for data collection: the use of multiple sources of evidence; the case study data base that assembles the data separately from the final case report; and a chain of evidence that provides direct links between the questions asked, the data collected, and the conclusions drawn (p. 95). In this way Yin’s (1989) discussion on data collection methods are closely related to discussions pertaining to quality and verification.

### ***Quality and verification***

As with other types of qualitative research designs, there is considerable debate about how case study research should account for validity and generalization. The crux of the arguments in defense of case study research centres around how research borrowed from the positivist paradigm should not provide the rules for verifying the quality and validity of case study research. Lincoln and Guba (1985) go as far as providing alternative terms for validity, reliability, and objectivity, suggesting instead the notion of *trustworthiness* as established through *credibility*, *transferability*, *dependability*, and *confirmability*, (p. 197). While not all case study scholars adopt these terms, they overlap in their agreement that case study research can achieve these criteria through triangulation (e.g. Lincoln and Guba, 1985; Merriam, 1998; Creswell, 1998; Stake, 1995). For example, Lincoln and Guba (1985) suggest triangulation of data sources, methods, and investigators, and through thick description. Merriam (1998) lists six strategies to enhance *internal validity*: triangulation, member checks, long term observation, peer examination, participatory or collaborative modes of research, clarification of researcher biases (p. 204). This is similar to Creswell's (1998) recommended procedures for verification (a term he uses instead of validity) of qualitative research, to which he adds rich, thick description, and external audits. Creswell recommends that researchers use a minimum of two of the verification

procedures, noting that triangulation, member checking, and thick description are the most accessible to researchers (p. 203). Creswell further elaborates on verification procedures by suggesting that each research tradition will have its own practices and standards for procedures, and that the study should reflect on how it meets these standards (p. 215). For case study research, he draws on Stake (1995) who specifically underlines the importance of triangulation in case study research, noting where and when more or less effort should be expended to confirm data through triangulation. Stake (1995) suggests a triangulation protocol that follows Denzin (1970) and occurs at the level of data sources, investigator, theory, and methodology. Additionally, Stake provides a list of 20 criteria for judging the quality of a good case study report (in Creswell, 1998, p. 214).

Guba and Lincoln (2005) provide the most elaborated arguments for rethinking quality and verification criteria borrowed from positivistic paradigm, and give considerable thought to how these criteria should reflect new-paradigm perspectives. Where researchers have always concerned themselves with rigour of method, Guba and Lincoln extend this to include interpretive rigour, which asks “can our cocreated constructions be trusted to provide some purchase on some important human phenomenon?” (p. 205).

Additionally, many case study scholars have challenged claims that case studies, given their small N characteristic, are weak in their inability to allow for the criteria of generalizability. Ragin (1997) turns the argument around and evaluates large-N research to the standards of case-oriented work. In his view, contrary to variable oriented research,

case research has the advantage of accounting for non-conforming cases by “citing factors that are outside their explanatory frameworks” (p. 39), since cases don’t need to be explained with a single model. Lincoln and Guba (2000) provide several challenges to the issue of generalization, one of which highlights that generalizations about human activity are never free of time and context, thus raising the question as to how long a generalization is actually good for. In my view, this is particularly relevant to research on online teaching, where the nature of the technological context itself is continually changing.

Lincoln and Guba (2000) also introduce the idea that transferability of a hypothesis is a direct function of similarity between contexts or “fittingness”. If two contexts are sufficiently congruent, then a hypotheses pertaining to one context might be applicable to the second (p. 40). Interestingly, Donmoyer (1990) takes a more radical position and highlights the ability of cases to account for diversity of contexts. He draws on Piaget’s schema theory, and argues that case study research is useful to “expand and enrich the repertoire of social constructions available to practitioners and others; It may help, in other words, in the forming of questions rather than in the finding of answers” (p. 182). In this view, Donmoyer emphasizes that a diversity of contexts (in this case school settings) can be seen as an asset and not a liability (p. 191).

The above research shows that case study research in the qualitative paradigm is no less concerned with quality and verification than variable-oriented research, but judges its research according to criteria that are congruent with the paradigm in which it is situated.

### ***Role of the researcher***

According to Creswell (2003), since the goal of research in the social constructivist paradigm is to look for complexity and multiplicity of views of the participants and to rely on the participants' views of the situation as much as possible, the positioning of the researcher is important, since she recognizes that her interpretations are shaped by her own cultural and historical experiences (p. 8). In this study I include my own experiences as a case, and I am additionally positioned in two of the other cases as a co-instructor. Therefore, my own case is a reflective inquiry into my own instructor presence across two courses that I was teaching, while my involvement as a co-instructor in two other cases constitutes a role of researcher participant. I view this as a strength of the study, in allowing me to understand the phenomena of instructor presence from multiple positions within a structured empirical investigation.

### ***Bounding the study***

In this study the unit of analysis and the case are not the same. I use the course as a unit of analysis, and the cases are the individual instructors teaching within the course. These individual cases constitute cases of teaching presence. However, in keeping with the social constructivist paradigm and the community as mediating component of the activity system, it was also important to try and gain the perspectives of students and program directors in understanding how teaching presence is negotiated.

## *Setting*

This study was conducted in three virtual sites. The first site was a post graduate certificate program situated in Croatia. The second site was a masters program in distance education situated in a Chilean university. The third site was a graduate program in education situated at a Canadian university with a large group of students located in different parts of the world. In the following section I provide contextual information about each of these sites.

### 1. Online Academy, Croatia

The Online Academy was an online post-graduate certificate program jointly developed by a governmental organization located in Croatia and a large Canadian university with the goal of preparing Croatian administrators, educators, and IT people in higher education institutions to implement educational technologies. This organization was integral as a driver for educational change in the country and efforts to create a “knowledge society” in Croatia.

My study draws on the first and second cohorts of this programme which were offered in English (and later translated Croatian), and were taught by Canadian instructors. In the first cohort students were selected and sponsored by the Online Academy organization. The rationale for this was that Online Academy viewed the first cohort as a pilot, and students participated with the understanding that their feedback could help to improve the program. Online Academy also had the goal of translating into



Croatian the subsequent offerings of the program, and it was expected that some of the students of the first cohort would be moved into instructor roles for subsequent offerings. The second cohort had a few students who were sponsored, but most of them were paying their own way.

The program was structured into four 15-week courses, with each course culminating in a certificate. The first certificate was called Foundations of E-learning, and was a required certificate to continue on to the other three certificates. Once students had completed the Foundations course, they could choose to continue on with a certificate in E-learning Tutoring, Course Design, or Management.

Three of the cases in this study were teaching Online Academy courses.

1. Case Linda describes the teaching of the Foundations of E-learning course certificate to the second cohort (Generation 2).
2. Case Joanne and Case Tannis describe the teaching of the E-learning Tutoring course certificate.
3. Case John describes the teaching of the Course Design certificate.

The Online Academy program adopted a structure that included a mix of face-to-face and online activity. Students were required to attend a one day f2f orientation in Zagreb, followed by 15 weeks of online activity. They then returned to Zagreb to attend a wrap up session. All of the Online Academy courses were taught using WebCT as a CMS.

## 2. Metropolitan University, Chile

Two of the cases (Linda and Tannis) involved an online course situated at a Chilean university located in a large city. This course formed part of a newly developed online Masters degree in distance education. Although the program was situated in Chile, it enrolled many students from Argentina. The entire program cost students about \$8000 Canadian, but Metropolitan University institutional agreements with neighbouring countries allowed differentiated cost to these countries, offering it at approximately \$4000 Cdn, with the option of monthly payments. Therefore, the program was accessible to the working middle class in the neighbouring countries, and the costs were considered fair value for Chilean high school and university teachers.

The rationale for the program was based on the following:

1. In Chile there were many teachers that did not have the competencies needed to be teachers, in that although there were professionals in their area of content, they had little training in pedagogy. There was also an understanding that teachers increasingly needed to learn about technology.
2. There was a recognition that similar programs already existed in f2f format, but not in distance. A distance program was considered important to allow women who wanted to study but needed to complement their learning with their professional, academic, and family activities.

3. Getting a Masters in Chile was a way of participating in professional development, but did not directly translate into a better salary or bonus for the person. Nevertheless, there was a possibility of a possible change in their position or job, since there were many distance education initiatives in Chile for which students in the program could be part of. Some of the first cohort of students had in fact become leaders in these initiatives.

The students from Argentina were part of a group from an Argentinean university, and this university was very well known from their use of closed circuit television for DE. This university was transitioning to online delivery, which lead to an agreement between Metropolitan University and the Argentinean University, which allowed Argentinean University students to also take the program for half the cost, with the option of monthly payments, making it more accessible for that audience.

The program objectives were stated as follows:

1.- Incorporar un conjunto actualizado de conocimientos para la implementación de sistemas de educación a distancia cualesquiera sea el ámbito de formación y las necesidades específicas de las poblaciones destinatarias.

*Incorporate a current knowledge base for the implementation of distance education systems across educational levels in consideration of the needs of the target population.*

2.- Desarrollar habilidades para el diseño, implementación y evaluación de sistemas a distancia.

*Develop skills in the design, implementation and evaluation of distance education.*

3.- Desarrollar habilidades para el diseño, implementación y evaluación de sistemas a distancia con la incorporación de las tecnologías de información y comunicación

*Develop skills in the design, implementation and evaluation of distance education systems using communication and information technologies.*

The program was organized into four semesters, and students were required to follow a specific sequence of eleven courses as a cohort. The fourth semester was devoted to a thesis project. Each course was designed to be completed in four to five weeks, and the entire program could be completed in a year. Courses were delivered in a CMS that was unique to Metropolitan University, since it had been designed and developed by the institution.

### 3. Canadian University, Canada

The Masters of Education (ME) program was situated at a large Canadian university in a Faculty of Education. The program focus was on educational technology, and was delivered entirely online using WebCT as a CMS. The program also had an international focus, with over twenty countries represented in the ME, but the proportion of international students to local students varied from course to course, depending on current enrolments.

The ME was designed for educational administrators at all levels and in diverse contexts, K-12 teachers, college and university educators, adult educators and course designers. The ME program was popular with local students who were currently employed as teachers in both the K-12 and higher education system. The majority of ME

students participated in the ME in conjunction with their employment. Teachers in the K-12 system automatically moved up the salary scale upon completion of a Masters degree, and this program allowed them to do it without having to displace themselves or take time off of work. International students were drawn to the ME because a Masters degree from this particular university had a certain amount of currency in their countries, and because it could be obtained at a distance.

The ME program was structured around the university's semester system, with 13 week semesters running from September to December, January to April, and May to August. Participation in the ME could lead to three options: a ten course masters of education, a five course graduate certificate in technology-based distance education, and a five course graduate certificate in technology-based learning for schools.

The above descriptions show the considerable variability in the sites and in the structures of their programs. Table 2 summarizes the timeline of each of the courses.

Table 2. Timeline of Course Delivery

Case	Course Taught	Year
Tannis	E-learning Tutoring (Online Academy)	Fall 2005-Winter 2006
	Teaching and Learning Theories (Metropolitan University)	Summer 2005
William	Narrative as Inquiry (Canadian University)	Summer 2003
Joanne	E-learning Tutoring (Online Academy)	Fall 2005-Winter 2006
Linda	Foundations of E-learning—Generation 2 (Online Academy)	Spring 2005
	Teaching and Learning Theories (Metropolitan University)	Summer 2005
Daniel	Text Technologies (Canadian University)	Fall 2005
John	E-learning Design (Online Academy)	Fall 2005

## *Actors*

Within each setting described above the primary focus was on the selected instructors teaching in these settings for the length of the course to which they were assigned. Where permission was obtained, I also include a secondary focus on students and administrators such as the program coordinators.

- In two of six cases, the same individual (Linda and Tannis) taught in two of the three sites. This provided an ideal opportunity to compare the negotiation of teaching presence in different contexts with the same individual.
- In five of the six cases the instructor (Linda, Tannis, Daniel, John, Joanne) shared teaching responsibilities with a co-instructor. In two of these five cases, the two cases taught with the same co-instructor (John and Daniel with Phillip, Linda and Joanne with Tannis). This provided an opportunity to look at how the two different instructors negotiated their presence with the same co-instructor.

Table 3 provides a summary of the distribution of cases across courses and contexts, and the co-instructor (where applicable) associated with the course.

Table 3. Distribution of Cases and Co-Instructors Across Contexts

Case	Course	Site
Joanne Tannis	E-learning Tutoring	Online Academy Croatia
Linda Tannis	Foundations of E-learning	Online Academy Croatia
Linda Tannis	Teaching and Learning Theories	Metropolitan University Chile
John *Phillip	E-learning Design	Online Academy Croatia
Daniel *Phillip	Text and Technology	Canadian University Canada
William	Narrative as Inquiry	Canadian University Canada
*not a case in this study		

### ***Events***

The cases were examined for the duration of the course, and any events that occurred within this bounded time period were studied. Events not only included the structured tasks defined by the course requirements that took place within the course



setting, but also the macro events that orbited the course itself, such as tensions that occurred as a result of institutional requirements and constraints.

### ***Processes***

Merriam (1998) states “a case study design is employed to gain an in-depth understanding of the situation and meaning for those involved. The interest is in process rather than outcomes, in context rather than a specific variable, in discovery rather than confirmation” (p. 19). Therefore, the negotiation of teaching presence constitutes a broad process that is the focus of this study.

### ***Selecting cases and sampling***

Creswell (1998) recommends selecting cases using purposive sampling, of which his own preference is to “select cases that show different perspectives on the problem, process, or event I want to portray, but I also may select ordinary cases, accessible cases, or unusual cases” (p. 62). In contrast, Stake (2005) simply claims that the most important criteria for selection is what can be learned from the case. I felt that selecting cases that showed different perspectives on the problem was the most congruent with the purpose of this study, and therefore adopted purposive sampling (Cresswell, 1998).

### ***Ethical considerations***

The nature of online teaching and learning contexts is such that text artefacts of communication between instructors and students are produced and sometimes live indefinitely on course management servers. Despite the fact that these communications take place in password protected software systems such as WebCT, both students and instructors place considerable trust in the host institution in maintaining the privacy of this communication. Violation of this trust could potentially undermine the existence of online teaching and learning as a viable alternative to other modes of delivery. Therefore, it was imperative that permission be obtained from all of the parties whose communication was being considered as data.

Additionally, I considered it important to emphasize to instructors that I wasn't assessing or evaluating their teaching or their performance. I was sensitive to the fact that there is a possibility for this confusion, since as instructors we are familiar with this type of review at various points in our teaching experience. I was also aware that if instructors weren't confident that this was not the focus of my research, it could have affected how they responded to some of the data collection procedures.

This study was approved by UBC ethics, and only includes data for whom and for which consent was obtained. The instructor consent form is included in Appendix A. All names of people, programs, universities, and course titles have been changed to respect the anonymity requests of some of the cases. Since the number of online distance programs in education is quite limited on a global level, this has meant that I have had to

be particularly vague about geographic locations. Therefore, I don't name the institutions involved in this study, since a simple Google search would likely reveal considerable information about the cases and programs they were teaching in.

Finally, there were certain ethical considerations that needed to be addressed with Case William, but since these considerations had no effect on the methodology or the trustworthiness of the data, my supervisory committee felt that the inclusion of this case was appropriate.

### **Data collection and sources**

Depending on the permission obtained and the type of data, the data sources for each case varied. In some cases I was able to obtain permission to interview and analyze discussion transcripts from all the students and the instructor, while in other cases I was limited to instructor alone. I have summarized the data sources in Table 4 below, followed by a description of how each source of data was collected and analyzed.

Table 4. Data Sources

Online Academy		
John	E-learning Design	<ol style="list-style-type: none"> <li>1. Two instructor interviews</li> <li>2. Instructor discussion forum postings</li> <li>3. Formative course evaluations (3x)</li> <li>4. Course documents</li> <li>5. Co-instructor discussion forum postings</li> <li>6. CMS quantitative data</li> <li>7. Interview: Croatian project manager</li> <li>8. Interview: Canadian project manager</li> <li>9. Focus group: Croatian tutor trainees</li> </ol>

Table 4. Data Sources

---

Online Academy		
Linda	Foundations of E-learning Generation 2	<ol style="list-style-type: none"> <li>1. Two instructor interviews</li> <li>2. Instructor discussion forum postings</li> <li>3. Researcher as participant</li> <li>4. Formative course evaluations (3x)</li> <li>5. Course documents</li> <li>6. Student discussion forum postings</li> <li>7. CMS quantitative data</li> <li>8. Interview: Croatian project manager</li> <li>9. Interview: Canadian project manager</li> <li>10. Focus group: Croatian tutor trainees</li> </ol>

---

Table 4. Data Sources

---

Online Academy		
Joanne	E-learning Tutoring	<ol style="list-style-type: none"> <li>1. Two instructor interviews</li> <li>2. Instructor discussion forum postings</li> <li>3. Formative course evaluations (3x)</li> <li>4. Course documents</li> <li>5. Student discussion forum postings</li> <li>6. CMS quantitative data</li> <li>7. Researcher as participant</li> <li>8. Interview: Croatian project manager</li> <li>9. Interview: Canadian project manager</li> <li>10. Focus group: Croatian tutor trainees</li> </ol>

---

Table 4. Data Sources

Metropolitan University		
Tannis	Teaching and Learning Theories	<ol style="list-style-type: none"> <li>1. Recorded reflections</li> <li>2. Course documents</li> <li>3. Discussion forum postings</li> <li>4. One interview with program coordinator (conducted in Spanish by the co-instructor in Chile)</li> <li>5. Informal conversations with the co-instructor</li> </ol>
Linda	Teaching and Learning Theories	<ol style="list-style-type: none"> <li>1. Two instructor interviews</li> <li>2. Instructor discussion forum postings</li> <li>3. Researcher as participant</li> <li>4. Course documents</li> <li>5. Interview: Metropolitan University course coordinator</li> <li>6. Metropolitan University website</li> </ol>

Table 4. Data Sources

Canadian University		
Daniel	1. Text and Technology	1. Two instructor interviews
		2. Instructor discussion forum postings
		3. Instructor weblog postings
		4. Course documents
		5. Co-instructor discussion forum postings
		6. CMS quantitative data
William	1. Narrative as Inquiry	1. Three instructor interviews
		2. Student interviews
		3. Instructor discussion forum postings
		4. Student discussion forum postings
		5. Student reflections
		6. Student survey
		7. Course documents
		8. Researcher as participant
		9. CMS quantitative data



### 1. *Interviews*

The interviews were critical to understanding the negotiation of teaching presence from the instructors' perspectives and constituted a primary source of data. I conducted a minimum of two semi-structured interviews with each of the instructors. The interviews were about one hour each and took place after the teaching experience was completed. The first interview was conducted to get an understanding of the course experience from the instructor's perspective. Appendix B outlines the interview question guide that I used in conducting this first interview. The second interview took place after I had done some initial analysis of the case, and provided me with an opportunity to gain further insight into specific areas, as well as check some of my interpretations with those of the instructor. All of the interviews took place in person, and were recorded digitally, and then transcribed.

### 2. *Discussion forum transcripts*

Discussion forum transcripts of the instructors' postings are a form of document as well as observation, since they provide the researcher with a view of the teaching experience as it occurs over time. I compiled all of the instructor postings in the discussion forum, and where permission was granted, those of the students as well.

### 3. *Course documents*

The online course environment is a container for other course related documents that are useful to informing the case. These include the schedule, course outline, details about

the assignments, course resources and the structure of the interaction spaces within the CMS. These documents were a useful description of the course setting, and although they weren't analyzed they provided necessary information for thick and rich description of each case.

#### *4. CMS data*

Online course management software (CMS) produces quantitative data that provides information about the number of messages posted by an individual, when they were posted, and in which online "conversation" they took place. This data was useful in gaining contextual information on the teaching experience prior to interviewing each instructor. This data was collected for all of the cases, except for the course being taught in Chile, which used a CMS that didn't have a mechanism for extracting this type of data. I looked at the frequency of instructor postings, the length of postings, and number of postings over time as part of the data for each case. It also looked at the number and types of postings that instructors initiated in comparison with postings to which they replied.

#### *5. Informal conversations*

In some of the cases (where permission was granted), informal conversations with the instructors provided moment-to-moment information about the case. These conversations were useful in that they provided information about the case and the course context that couldn't be accessed in a more formal interview situation. While these conversations weren't recorded, I made written and oral notes (using Microsoft notebook or an mp3

recorder) when I thought it was relevant. My notes on informal conversations weren't analyzed, but were used for triangulation purposes to authenticate my interpretations of each case.

*6. Researcher as participant observation (Linda, Joanne, William cases)*

In three of the cases I occupied a role as participant observer. I co-taught two courses with Linda and one course with Joanne. I was also enrolled in the course that William taught.

*7. Student survey (Case William only)*

In Case William, students completed a short survey administered on the last day of the course. In concordance with ethics, this survey was not compiled and analyzed until after the student grades had been submitted (Appendix C).

*8. Formative evaluations (Online Academy courses only)*

The Online Academy had students complete three formative evaluations consisting of five questions during the course (after each module). Although these evaluations were not completed by all students, they do provide some insight into the cases.

*9. Student reflections (Case William)*

One of the required assignments in William's course served as a data source. This assignment constituted a reflection about face-to-face and online learning experiences, and was therefore considered to be a relevant data source.

### **Data analysis procedures**

Individual cases were analyzed according the iterative procedure outlined in Creswell (2003, p. 192). Although there was some variation in data analysis procedures across cases, for the most part consistent data analysis procedures were applied across all cases prior to cross case analysis.

### ***Technical Procedures***

I used a variety of techniques to compile and analyze data. First, I created an indexed organization of all the data sources for each case, using a software called OmniOutliner Pro, which allowed me to link directly to the files on my hard drive, and in the case of audio played it directly in the software as needed. This allowed me to organize and view all the data for a given case, without getting lost in the location of files and having to open up multiple applications.

Once interviews were transcribed, I used Microsoft Word Notebook to create a document for an entire interview, and then I used the tabs feature to extract passages into themes—each tab became a primary theme. I also used other Word features such as the

highlighter, underlining, boldfacing, and changing the font colour to aid the process of identifying important statements in relation to the themes. I also added procedural and analytical memos using the voice tool.

In the second phase of analysis, I used the MAXqda2 qualitative data analysis software to code interviews and discussion forum postings. Since I had already used the Word Notebook feature to extract and organize themes from the interviews, I found using MAXqda2 to code the interviews did not really add anything to the analysis, and I abandoned this effort after two cases. I did however find that MAXqda was useful for coding and analysis of the discussion forum transcripts. The software allowed me to easily collapse categories, calculate frequencies, and view where categories intersected. However, I also discovered that it was easy to fall into the trap of overcoding, and I found myself having to reread transcripts for evidence of patterns to take a broader look at the interactions and go beyond viewing messages as individual units of meaning.

### *Analytic procedures*

Consistent with Stake (2005) each case was analyzed separately, beginning with the first interview, then the discussion forum transcripts, and finally the remaining sources of data. Activity theory, as well as the notions of positioning and identity provided the analytical lens that I brought to the data analysis. Interviews were the starting point for my analysis, and from the themes that emerged I was able to connect

them to these guiding frameworks. Once the interviews had been organized into themes, I then began to systematically look at the discussion forum transcripts.

Analysis of the discussion forum transcripts involved several steps. First, I read a printout of each transcript twice, and began making notes in the margins that highlighted significant points or provided interesting evidence of something that an instructor had mentioned in their first interview. I then began looking at the transcript for evidence of patterns in instructor postings, as way to begin characterizing their interactions. I then proceeded to adopt codes for these patterns, and some of these codes were loosely based on Berge's (1995) typology of instructor interactions. For example, I noted when a posting was of a managerial or technical type. I then began developing my own codes for interaction characteristics that I felt might be significant—asking questions, providing examples, integrating own experience and expertise, etc. This proved to be helpful for some of the cases where the instructor didn't have their own sense of what characterized their interactions. The discussion forum transcripts primarily were used to triangulate instructors' statements about their experiences. In many cases, their interpretations matched the evidence provided by the discussion forum posts, but occasionally an instructor's understanding of his interactions did not match the evidence provided by the discussion forum. When this occurred, it was taken up in the second interview for further exploration.

The second interviews were conducted after this initial analysis and gave me the opportunity to ask further questions that I thought were relevant to understanding the case

and to seek clarification. These interviews were generally much shorter—approximately thirty minutes long.

The next procedure involved looking at the remaining data that had been collected to inform the case, and to provide a method of triangulation. In particular, CMS data was useful in gaining further insight into instructor interaction characteristics, and course documents provided useful contextual information about the constraints that instructors faced in their courses. Where permission was obtained, student interviews provided a way of understanding student perceptions of teaching presence and the events that occurred during the course. Course evaluations (where obtained) also provided this information.

### **Cross case analysis procedures**

Once each individual case had been analyzed, cross case analysis followed the procedures outlined by Stake (2006). Stake is clear that unlike qualitative or quantitative comparative studies, multicase design is not a design for comparison of cases—the goal is to show how the selection of cases informs the phenomenon, and in doing so, understanding each individual case is what is important. In the first phase of cross case analysis I created a matrix of emergent themes from each of the cases. This matrix was useful in seeing not only where cases were similar, but also where they differed. All of the cases provided useful insight on how instructor presence is negotiated across a variety of contexts.

In the second phase of analysis I adopted Stake's (2006) step-by-step method of conducting cross case analysis through a series of worksheets. The first step involved establishing themes for all the cases, which evolved from the research questions. The themes were comprised of:

1. How do instructors conceptualize the online environment?
2. How do instructors position themselves in the online interaction space/s?
3. How does the technology mediate the experience?
4. How do instructors negotiate sociocultural considerations such as language and global/local sociopolitical contexts?
5. How does the community (students and co-instructors) mediate the experience?
6. How does course design influence instructors' teaching presence?

The next step involved establishing findings for each of the themes, case by case. Then, based on the findings for each of the six themes, tentative assertions were made for each case. The final step involved making multicase assertions, while respecting the situationality of each case.

### **Strategies for validating findings**

In keeping with Creswell (1998) I used the following verification procedures: triangulation, member checking, thick description, and peer debriefing (p. 203).

Interviews were first triangulated with other sources of data such as discussion forum



transcripts and quantitative data, and then once each case narrative was written, it was brought back to the individual instructor for verification. I also consulted my supervisor and colleagues to validate my interpretations of the cases in relation to the activity theory framework.

The presence of so many data sources available for triangulation gave me much more confidence in my analysis and assertions that I eventually made about each case, since I consistently tried to have a minimum of two sources of evidence for each claim or assertion that I made about the case. I also found that adopting member checking as a verification procedure not only gave me more confidence in my interpretations, but also gave the cases the opportunity to have a voice in this research.

### **Reporting the findings**

As case study research, thick description in the form of narrative is a defining characteristic and necessary for criteria of quality and verification. In adopting a descriptive, narrative form I have attempted to provide a holistic picture of each case, in addition to the use of data displays for cross case analysis (Miles & Huberman, 1994). However it must be underlined that thick and rich description takes on a different form in online research contexts, since unlike f2f research context, the nature of online contexts means that observation of the experience is limited to the artefacts created during the experience. For example, Liam Rourke's recent dissertation (2005) of his online case

study research, he never actually met any of his case participants, basing his observations on the online interactions and interviews he conducted by phone.

### **Purpose of the study**

The purpose of this study was to gain a sociocultural perspective of the critically important construct of teaching presence. This perspective claims that teaching presence is a negotiation that occurs between instructors and the teaching context, as defined by the activity system. In this view, instructors are not performing preconceived roles, but are engaged in a dynamic process in which teaching presence is shaped through the mediating components of the activity system. In adopting this view and a case study methodology, I was able to gain a better understanding of the ‘why’s’ of teachers’ interactive decisions in online teaching contexts. I feel this exploration is particularly timely and relevant given the emergence of online teaching contexts where instructors and students in an online community of inquiry might not share the same sociocultural contexts. Furthermore, the online environment provides researchers with the ideal opportunity to closely examine online teaching, yet, in my view this opportunity has been underexploited. This research project addressed this gap in the literature, and provided a new way for thinking about online teaching.

## **Organization and structure of the case reports**

In order to provide a consistent narrative structure to the reader, each case report has been organized in the following way:

*Name of the instructor:* All names have been changed

*Background:* This section provides essential background information about the case such as their age range, academic background and area of expertise, occupation, and name of the course taught (which has been modified slightly to provide more anonymity).

*Case data:* Since each case draws on slightly different data sets, I have noted the data collected to inform each particular case.

*Course design:* This section gives a brief overview of the design and topics of the course being taught.

*Perspective on the problem:* This section provides the rationale for the selection of the case.

*Characteristics of instructor interactions:* This section provides description of the instructor's interactions in the course and highlights any observed patterns.

*Themes:* In this section I describe and analyze the themes that emerged from the examination of the data. Themes are given a descriptive title.

*Discussion:* I summarize the themes and discuss them in relation to the research questions. This includes a discussion of positioning, identity, tensions and contradictions

in the activity system, and constraints and affordances. I then draw conclusions about the case in relation to its contribution to a sociocultural perspective of teaching presence.

Note: In presenting evidence from discussion forum and interview excerpts, I've used underlining to highlight relevant sections.

## CHAPTER 4:

### CASES

#### William

##### **Background to the case**

William was in his early sixties, and was a full professor at a Canadian university. His area of expertise was in modern language education, and the course that he was teaching discussed in this case was on the role of narrative in language education research. William had 35 years of teaching experience at the university level, in both graduate and undergraduate programs. He was very committed in particular to graduate student learning, and was perceived by many to be a supportive and knowledgeable mentor. In fact, his name had been put forward on at least one occasion for a major university-wide mentoring award. William repeatedly emphasized how much he enjoyed teaching and working with graduate students.

##### **Case data**

- Three interviews with the instructor
- Six student interviews (face-to-face and instant messaging )
- Instructor discussion forum postings
- Student discussion forum postings

- Student survey
- Course documents
- CMS data
- Student assignments

### **Course design**

The course that William taught was one that he had designed for a face-to-face context, and then subsequently taught for several years in a mixed mode format. At the time of this offering he was teaching the same course in a mixed mode and online format concurrently, and this was the first time he had taught it completely online. The twelve-week course was compressed into four weeks for this offering, something he had done in the past as a mixed mode offering.

The course placed considerable emphasis on online interaction. Within the four weeks, students were expected to engage in three weeks of intensive online interaction, followed by one week of time for completing a term paper. Intensive engagement meant that students would be reading and contributing to the discussions on a daily basis.

The course covered topics related to narrative as inquiry in the context of language education. Unlike conventional distance education courses (such as the other cases in this study) the two required textbooks and the discussions served as the content for the course. There were no other materials in the WebCT course site, other than the syllabus and a schedule and his own online presence.

Course assignments and activities were described as follows:

1. 20% Write a language and culture autobiography and post it on the bulletin board as soon as possible.
2. 20% Summarize and critique an assigned chapter and post this summary on the bulletin board along with 3 questions to stimulate discussion of the article with other students. All students are encouraged to participate in the discussion of each assigned chapter summary.
3. 20% Discuss the constructivist approach to language/culture/content learning and develop a personal theory of Second Language Acquisition based on your language and culture autobiography, prior and present readings and experience.
4. 20% Evaluate the effectiveness of online discussions and learning as compared with conventional face-to-face seminars for language/content teaching.
5. 20% General quality and quantity of your online participation in discussions throughout the course.

The content of the course introduced students to terms such as “social presence” and “teaching presence”, therefore in their reflections and interviews students often used these terms in responding to research questions.

### **Perspective on the problem**

Unlike the other cases that are presented in this study, this case was unusual in that it was taught as an intensive four-week summer course, and was taught by an instructor with who was

actually a professor at the institution. Additionally, William was teaching this course alone—there was no co-instructor, unlike the other cases in this study. William also had the most online and face-to-face teaching experience of all of the online instructors. For the past seven years all of William’s face-to-face courses had an online discussion component, as a result of his enthusiasm for the opportunities it provided all students (ESL and non ESL) for extended interaction. However, this was the first time that William was teaching this course exclusively online, without a face-to-face component.

### **Characteristics of William’s interactions**

The CMS data shows that William posted 247 messages in a four-week period, and of these, 206 were replies.

Table 5. William’s Discussion Forum Postings

Total messages	247
No. initiated	41
Total replies	206

When compared to the total number of messages that students posted, William posted 23% of all the messages. The 11 students posted a total of 1094 messages, representing 77% of the online activity. The least active student posted 35 messages, while the most active student posted 127.



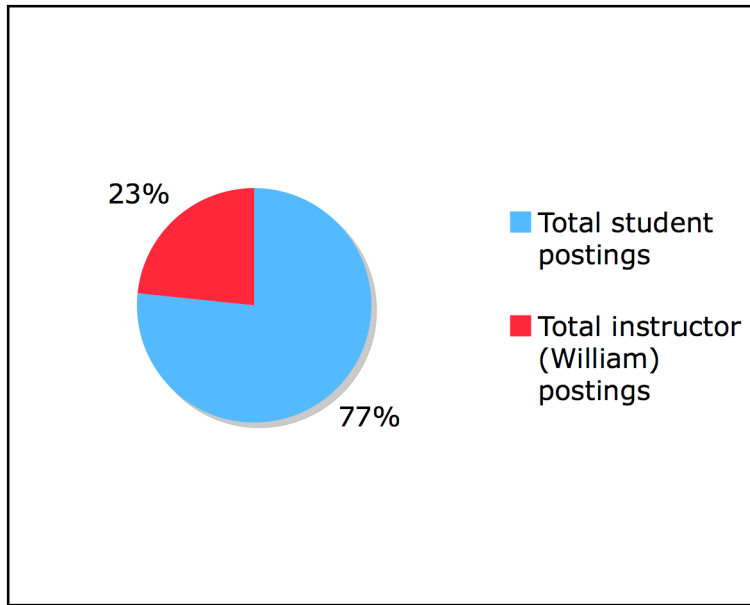


Figure 3. Comparison of percentage of William's postings to student postings

Early on in the course and for the remainder of the four weeks William repeatedly emphasized the expectation that student-student communication was important, explicitly directing students to certain posts.

Message no. 5779

Posted by William on Wednesday, July 28, 2004 8:25am

Subject: Imagined communities and imaginary classes.

As you can see I am very interested in this topic and I hope you will all reply to my questions on this. Please read Deborah's response- it is very interesting and I believe of great significance for online learning.

William's interactions in the discussion forum consistently followed a pattern, described below:

1. William engaged in “chaining”—reminding students what stage they were at in the course, outlining future tasks, and chaining ideas relevant to the stage of the course. Again this was established early on and continued throughout the four weeks.
2. William consistently acknowledged student contributions with enthusiastic feedback and pushed them to include more by asking specific questions that would take them down a wider path.
3. William addressed students individually in his postings, and often provided additional questions and counter-perspectives in his replies.
4. William frequently repeated his ideas in separate postings to different students.

It wasn't until I interviewed William that I came to have a clearer understanding as to why he engaged in the discussions in the way he did. Both the design of the course and William's interactions constituted a carefully calculated approach based on his own theoretical beliefs about teaching and learning. It is important to observe that William's course adopted an unconventional design, very unlike the other distance courses in the program and at the Canadian university at which he taught. Apart from a syllabus with a schedule, and a section devoted to resources, there was no actual content created by the instructor, which is unusual for a distance course.

I wondered whether students would get lost in the unconventional design. William emphasized in his interview that he himself felt that the course was very structured, and that considerable thought had gone into its planning.

*William (interview 1): I spent quite a bit of work on setting up the readings and sequencing them and that was the structure. So that once the course began I didn't [refer] so much [to a] curriculum but I talked about comprehending the readings and the inter-relationships between the readings and our mutual critiques of the readings. That was of course the curriculum because it was sequenced. Because the course was so short we tried to be very strict on keeping to the sequence.*

In the interviews conducted with William, he repeatedly talked about his approach to teaching as rooted in social constructivist understandings of student learning. This understanding influenced not only how he structured and designed the online course, but also the approach that he adopted for facilitation.

*William (Interview 3): I have always been a student of learning and by definition [I believe in] student centered instruction. You have to let the students structure it so it fits in with their individual differences and their individual schema. So this pretty much influences the way I approach online instruction and why I was so excited about online instruction when it first came out. I saw this as a potential for allowing for much more deeper reflection on the students' part and not a simple one-way teacher centered situation. It seemed to me an ideal technology for promoting learner centered teaching or learner centered learning, particularly for critical thinking—approaching material from a more profound or deeper level of processing, where there is more reflection and deeper level of thought. So this influenced my whole approach to teaching and to my online teaching.*

The structure that William adopted was one that allowed him to effectively facilitate according to his theoretical beliefs about learning.

*William (Interview 3): First of all of the course is structured so that in the initial meetings I have people introduce themselves and tell me about themselves but also they have to write autobiographies. So I get to have a tremendous amount of information on each one of them [which allows me to] design the instruction to each individual. This is very, very useful and allows much more appropriate*

*interaction at the correct level [by] knowing the interests and the background of that student.*

The discussion postings show that the instructor emphasized the importance of the language and culture autobiography as soon as students posted their first message. He urged them to post it as soon as possible, and then to continue to add to it as the course progressed. William kept encouraging students to go deeper into their autobiographies, asking further questions and suggesting further angles for them to take in continuing to develop them. One of the first messages William posts makes immediate reference to the language and culture autobiography.

Message no. 5595

Posted by William on Tuesday, July 20, 2004 8:12pm

Subject: Welcome to EDTC 505

Welcome to EDTC 505. Now that you have successfully logged onto this course site, please send me a message acknowledging that you are online. Please examine the course outline and make sure you have the 2 required texts. They are both available at the bookstore.

Please start your language and culture autobiography of language experience in your lifetime starting from your earliest memory of languages up until the present date.

Feel free to post any messages even before the course starts next week.

Cheers

This second example is directed at a specific student and sets expectations around the language and culture autobiography activity while encouraging the student to begin.

Message no. 5630[Branch from no. 5620]  
Posted by William on Friday, July 23, 2004 9:45pm  
Subject: Re: Language and culture autobiography

ME Student A

I spent some more time examining your very interesting website. I am very interested in your language/culture/identity autobio because you will be able to include a view of the role of technology in SLA as well. As you read the other autobios of the other students, feel free to include other aspects of what you think were the driving forces that really helped you acquire a second language. I am looking forward to your autobio.

The next example encourages a student to continue to work on her language and culture autobiography throughout the course.

Message no. 5635[Branch from no. 5632]  
Posted by William on Saturday, July 24, 2004 7:58am  
Subject: Re: Language and culture autobiography

ME Student B

Excellent writing. You have good insights and you come to a reconciled identity. I don't want to influence your narrative too much but I would like you to continue polishing this great writing and see if as you work with it if other memories regarding when you felt proud, marginalized, frustrated occurred and also if you can state more clearly what you think were the best experiences/courses for improving your L2 and L1. What were your social motivations? I think this narrative will become very valuable to you and it will reaffirm your identity and values in teaching languages. So, please keep expanding the detail on this excellent narrative.

The importance of the language and culture autobiography is repeatedly emphasized in his postings—analysis of the discussion forum transcripts shows that he mentions “language and culture autobiography” 139 times in his postings.

As part of this study, I also had access to William’s mixed mode offering that he was teaching concurrently, and permission from him as well as the students to observe both of these courses. I noted that in the online version more of his messages seemed to be coming from a more professorial voice, and were more content-focussed, in contrast to his mixed mode interactions where I observed that his postings were more about acknowledging contributions and facilitating discourse to some extent. In one of the interviews with William, he mentioned that he felt that his interactions were more content focussed in the online course because he felt like he had to compensate for the lack of contact with students that the mixed mode afforded. In a subsequent interview with William, he further commented on this point:

*William (interview 1): I think that the online, it doesn’t allow the same social facility because maybe you don’t know them as much. I did feel that it was a more serious discussion online. I certainly didn’t have to do any policing at all online; I think that I did have to do a little bit in the mixed mode. I thought it [the distance online version] was more serious and more academic.*

William described himself as both an online facilitator and professor with clear intentions for this role. I found it interesting that he advocated student-centred learning but still

maintained a positioning of professor, which often suggests a hierarchy between instructor and student. William explained how he felt his positioning as a professor might be considered an affordance in this case.

*William (interview 1): I am not teaching. I really believe in student centered teaching and teaching to me implies to me teacher centered. I would say that I am very much trying to get them to think and to get them to develop their research topics and their professional orientation.*

*Tannis: You said online facilitator/professor, why professor?*

*William: Because there are certain things where it is obvious that I do know a lot more about it than them, only I try not to come across as a great authority but it is obvious that I do have 35 years of teaching and research. There are areas that I know that I can help them with.*

William's approach to teaching was also clearly influenced by own background as educational psychologist.

*Tannis: How would you describe your facilitation style? Why do you post and what are you trying to do when you post? If you had to describe how you are as online instructor how would you describe it?*



*William: One of the big criticisms is simply that [teaching online] is too time demanding for professors. So what I have been trying to do is show how you can implicate the students and they can carry the ball in the discussion and the professor doesn't have to respond to every message with a lengthy professorial rejoinder. So that is part of what I have been doing— getting them involved but at the same time showing that they can carry the ball. So the idea is to introduce as much critical reflection and as much thinking about this as possible but at the same time trying to back out of it a bit because otherwise the professor can end up doing so much work they will probably have a stroke or something.*

The discussion forum transcripts show that William constantly encouraged student-student communication and avoided posting long messages. One of the strategies he used was to direct students' attention towards the contributions of their peers.

Message no. 5779

Posted by William on Wednesday, July 28, 2004 8:25am

Subject: Imagined communities and imaginary classes.

As you can see I am very interested in this topic and I hope you will all reply to my questions on this. Please read [ME Student C's] response- it is very interesting and I believe of great significance for online learning.

In a thread discussing teaching presence, one of the students commented on the approach that William took in modeling the student-student and instructor-student relationship.

ME Student D (discussion forum post): I feel more confident with William's presence because not only does he guide and point us in a direction, but he has

also modelled expectations, and conversational norms within his own conversations. In this respect he is the first online prof to engage in the material with the students as co-participant and co-collaborator.

This approach was key to establishing the outcome of his teaching presence—online community. Again, William highlighted the importance of the language and culture autobiography in providing the foundation on which to begin developing the online community.

*William (interview 2): I think [the course] was pretty much a community of inquiry. We were all trying to explore new possibilities of second language acquisition and students were given assignments that really valorized their identities and their own experiences and culture—the autobiographies were designed to do that. So they actually got to really feel that they were highly valued and very important and they had a lot to say and contribute (based on their autobiographies). They therefore could develop their personalized theories of second language learning and teaching.*

In fact, William frequently used the term “online community” in his postings, as a way of reminding students what the objective was, and what he was trying to do. He mentions the word “community” 38 times in his interactions, and frequently rewarded students when they demonstrated collaboration and support. The following message provides evidence of the level of transparency of his expectations.

Message no. 5636[Branch from no. 5633]  
Posted by William on Saturday, July 24, 2004 8:02am  
Subject: Re: Language and culture autobiography

[ME Student E]

Thanks for these collaborative and supportive remarks to [ME student B]. We are already on our way to developing a cooperative and understanding online community. I hope others will respond soon and this social constructivity will permeate our community. In this course we are not competing we are collaborating so that we all can come to write autobiographies that we will treasure for the future and for our friends and families.

Student interviews and questionnaires confirm that William achieved the goal of creating a sense of community within a short period of time.

William also paid careful attention to critical thinking, another desired outcome of his teaching presence. In his interviews, he described his strategies in stimulating critical thinking as acknowledging and commenting on their ideas, and referring them to other cases, articles, or perspectives. Additionally, he sometimes provided metaphors and other examples. In one of his interviews, he acknowledged that critical thinking was a more important objective than the actual content of the course.

*William (Interview 3): Wherever possible what I am really trying to do here is encourage critical thinking and thinking about issues that could be researched further.*

In the same way that he repeatedly made his expectations for community transparent in his messages, he also reminded students about the expectation of critical thinking.

Message no. 6661[Branch from no. 6660]  
Posted by William on Thursday, August 19, 2004 8:02am  
Subject: Re: Help! Assignment stress

[ME Student C]

... I am glad these assignments have facilitated your critical thinking about these issues.

In keeping with his student-centred philosophy, William adopted an approach to his facilitation that positioned students as authorities.

*William (Interview 2): There was some direction instruction where I would explain new concepts or theories they weren't familiar or other articles or points of views. So certainly there was direct instruction but it was always open to their adding direct instruction themselves. I didn't see myself as the only authority here, in fact in many of the areas they were more authoritative on aspects of Asian culture than I was and I told them so. I presented them as the authorities and each of us was an authority in certain domains.*

*William (Interview 3): ... the students themselves in some cases were more authoritative than I was on certain aspects of Asian culture. Other students would offer elaborations or extensions of that. I certainly did offer elaborations, extensions and other examples when I thought it was necessary.*

As a way of reducing the student instructor hierarchy he consciously used structures such as “I think” as a way of presenting opinion.

*William (Interview 3): [When I say] ‘seeing as I think’; I am not saying this is the way it is. The idea of ‘what do you think’, [is]implicit in that. It is not ‘this is the way’. [It’s] that idea of encouraging them to think critically about this as well.*

*It is sort of a whole philosophy of how you inter-relate with your students and how you know them as people and as individuals and that above all as equals. You try to understand their perspectives, their values, their religion, their culture, their whole background and try to establish a working knowledge of this schema if you want so you can relate to that.*

William was also conscious of the need to simply be present, even if it meant posting seemingly banal messages.

*William (Interview 3): I think a lot of times I was just saying yes, good point—very brief [messages]—and that is just to reward people and to keep them involved because I do think instructor presence is important. So a lot of messages were just to acknowledge, to let them know I have read their message and monitoring what they are saying and I am encouraging them to contribute.*

For example, in the following message William is responding to a student who let him know she was working on the assignment. William's response is simply a brief encouragement.

Message no. 5713[Branch from no. 5691]  
Posted by William on Tuesday, July 27, 2004 2:30pm  
Subject: Re: Hello from [ME Student C]

[ME Student C]

OK, I am looking forward to it.

## **Themes**

### ***Sociocultural considerations***

William was sensitive to the sociocultural contexts of the students. This was evident not only in his interactions with the students, but also in how he constructed the course. William considered the sharing of the language and culture autobiography in the discussion forum to be a critical piece of the course, in that it provided students with the opportunity to present themselves to the group, while highlighting their linguistic and sociocultural attributes in a positive way. In the case of students for whom English was not their first language, it allowed them to position themselves as multilingual individuals as opposed to deficient in the language of instruction. Interviews with students (both native speakers and non native speakers of English) unanimously showed that this was a highly successful assignment. Several of the native speaker (NS) students who were

interviewed said that it in fact opened their eyes to the challenges that non-native speakers of English (NNS) students face in online courses.

William further described how his sensitivity to the sociocultural contexts of students evolved into strategic communication strategies that he employed in his interactions.

*William (Interview 1): Yes, I think that there is a tremendous amount of sophisticated editing going on [on the part of the instructor] and of course you probably wouldn't go into teaching in the first place or you wouldn't be successful if you didn't have a lot of those abilities in the first place. But when you have done it for 30 years, (especially since I have always been teaching minority students or students who were second language is English or French all my 35 years) I think I may have developed quite a bit of expertise in being sensitive to how you restructure [your communication] so they will understand it—[for example] like using a high frequency words/nouns when you are communicating to people. For cultural examples you have to use the most blatant ones to make sure that they understand those.*

William also stated that he was aware of making linguistic adjustments in every message, not just because students might be NNS of English, but because they might not be familiar with the terminology that goes along with the field.

*William (Interview 3): You constantly have to be in the right register...you always have to be adjusting, accommodating your message to them. That is appropriate not only in terms of language but in terms of the knowledge they have been exposed to.*

One of the international students (for whom English was a third language) was particularly appreciative and conscious of the sociocultural considerations taken in the interactional approach of William.

*ME Student A (Assignment reflection): Traditional classroom is often perceived as a stressful environment where stresses on one correct answer and all productions are graded. Consequently, learners develop negative feelings on the taught language, the method used, the institution or the teacher. It is therefore part of the instructor's job to make language learning as a free of stress and enjoyable experience. It should be done in encouraging and relaxing conditions. I experienced such harmonized learning environment in [this Education course] where collaborative and cooperative learning through the process of negotiation are highly valued.*

### ***The constraint of time***

Time is a frequently mentioned constraint, amplified by his approach to online teaching which required ongoing, individualized interaction with the students. William found it different from face-to-face teaching in the amount of time required on his part:



*William (interview 2): The challenge partly is it is much more demanding in the number of hours. You are now teaching 30 different mini classes rather than one class. In a teacher centered class you are doing direct instruction, where you teach to the class where as here you can respond to every individual student in terms of their interest. It is 30 times as much instruction if you follow that model.*

But William felt quite strongly that the amount of learning that resulted was a strong motivator for him to continue investing this amount of time and energy. When William's discussion forum activity is compared to that of the students, it is apparent that over the period of four weeks, he often posted a third of all the messages posted for a given day. In fact, William said he spent on average five hours a day reading every posting and responding to students. While the CMS data does not provide a daily time total for an instructor's activity, Figure 4 provides a graphic representation of the quantity and frequency of his posts over the duration of the course compared to those of the students.

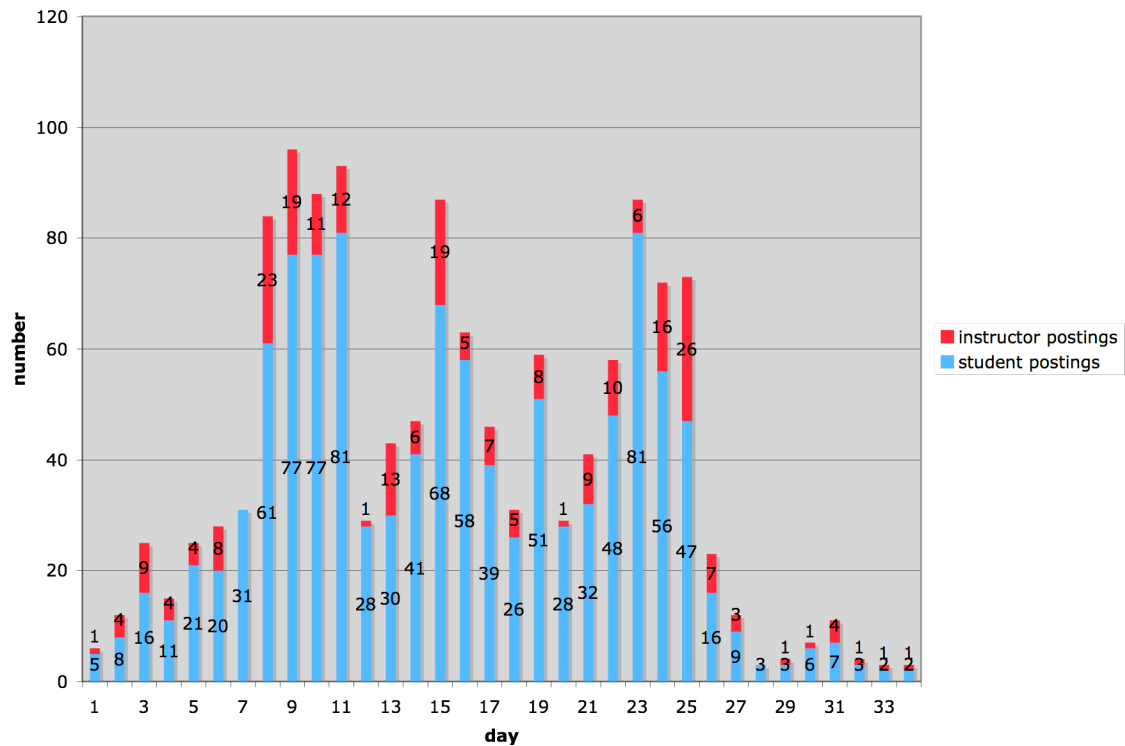


Figure 4. Comparison of number of student posts to instructor posts by day

What is surprising about the frequency and amount of William's discussion forum interactions is that students did not feel that William dominated the discussion or posted too frequently. Questionnaire data showed that students rated William highly in effectiveness of facilitation, and value of instructor contributions to the discussion. Student interviews are also enthusiastic about William's presence.

*ME Student A (interview)*

*Main difference of this course experience was teaching presence, when compared to other courses in the program. Structure not the defining element, but instructor presence highlights the paradox of “constructivist” courses where responsibility is on the students to learn, but doesn’t feel presence unless the instructor posts.*

It is also interesting that for at least two of the students William’s presence was viewed as providing an important feedback function.

*ME Student A, (Assign and interview): The instructor made himself socially present by posting the discussion questions and providing feedback to facilitate more in-depth discussion. His presence not only helped keep students focused on the task at hand, but also refined the discussions so that the conversations progress from information sharing to knowledge application and integration, and eventually knowledge construction. My awareness of the knowledge level that I proceed and underwent made me consider the course was well planned and relevant to the course objectives. The guided learning offered by the instructor greatly enhanced my learning motivation and participation in the course.*

*ME Student B (Assignment): Through the supportive feedback provided by the rest of the community and the professor, I found my sense of belonging was more quickly established than usual.*

## Discussion

In this case, the negotiation of teaching presence was a dialogue between the theoretical beliefs the instructor had about teaching and learning, his own established identity as a knowledgeable professor, and the design and structure he created for the course.

William positioned himself in the activity system and participated in a way that literature would describe as a ‘sage on the stage’ approach, but the unanimous appreciation of the approach by students throws into question distance education’s preference for a ‘guide on the side’ teaching presence. However, in looking at this more closely it must be underlined that the design and unconventional structure of the course required this level of presence. A constructivist approach for William meant adopting a structure that would allow him to provide a high level of student-centred, individualized teaching. The effect of this approach required a considerable amount of his time, one that most instructors would likely find difficult to sustain, especially since many online instructors are juggling online teaching in addition to their other responsibilities. Additionally, this approach required an instructor who was both confident in their teaching abilities and extremely knowledgeable of the course content

Therefore, the significance of this case is in demonstrating that the debate about how much or how little instructor interaction, or how authoritative of a position an instructor should adopt, has less to do with adhering to guidelines of ‘guide on the side’ in preference to a ‘sage on the stage’ approaches to teaching presence and more to do with

course design and structure, as determined by an instructor's own theoretical beliefs of teaching and learning. The evidence provided in this case reminds us that a constructivist approach to learning in online courses can take on a range of designs and structures and sometimes requires that an instructor adopt a more direct approach to facilitate student learning effectively. This revelation was best described by ME Student A who described it as the "paradox" of constructivist online courses.

Student surveys and interviews also highlighted that William was very successful at creating a strong sense of community in a very short period of time, which throws into question research that attempts to describe how long it should take to create a sense of community in an online course. Again, the data suggests that both teaching presence and course design have an important role in determining the speed at which a sense of community can be realized. The inclusion of a student language and culture autobiography gave students an opportunity to position themselves in relation to their sociocultural identities, thus providing a way to extend the ESL/Non-ESL or international/local binary that often defines them in online courses. An outcome of this activity was that it generated appreciation for their classmates as interesting, complex individuals who had important things to bring to the discussion, and thus helped create a strong sense of community. Importantly, the language and culture autobiography activity helped William to individualize his teaching presence by overcoming the constraint of not 'knowing' his students in a way that some of the cases that follow were not able to.

John

### **Background to the case**

John was in his early forties, and was employed as a course developer at a large distance education unit at a Canadian university, a position that he had occupied for two years at the time of this study. John had a PhD in a field outside of Education, but had subsequently returned to university and completed a Masters degree in education.

### **Case data**

- Two interviews with the instructor
- One interview with co-instructor
- Instructor discussion forum postings
- Student surveys (three formative evaluations of the course)
- Course documents
- CMS data

### **Course design**

John was co-teaching a 15-week course on E-learning Design as part of the Online Academy. The course was structured in a way that had both instructors sharing the

interaction space, which consisted of pre-defined topics in the discussion forum. The topics for E-learning Design were:

- Welcome and Introductions
- Announcements
- Discussions 1-7
- Student café

Most discussion topics were open for contribution for a two week time period and spread across the fifteen weeks. Students were not required to participate during the two week Christmas break, which began in the eighth week of the course.

The course guidelines included specific criteria and expectations for participation in the discussion forum, and each student's contributions were graded for each topic, comprising 10% of the total grade. The role of the discussions was to enable students to explore how the concepts could be applied to different e-learning contexts. Additionally, the rationale for the discussions was grounded in a constructivist approach to learning, which suggested that learning could be enhanced when participants interact and share their ideas and experiences about the topics under discussion. In addition to the discussion forum activity there were also three course assignments, each one scaffolding towards a final project (Assignment 3).

The students were given the opportunity to complete three formative course evaluations (Appendix D) given at three different intervals during the fifteen weeks. The purpose of these evaluations was to provide feedback on the course and the facilitation.

John didn't actually recall seeing these evaluations, or discussing them with his co-instructor Phillip. Nonetheless, throughout the course John and Phillip regularly checked in with each other to conduct their own assessments of how things were going during the course of their teaching.

### **Perspective on the problem**

John was the second person I interviewed. John was selected because he had never taught online, and was co-teaching with somebody who had extensive experience online teaching. Like case Joanne, John had little understanding of the students and their context, having only met them briefly through a videoconference.

John co-authored the course with Phillip, and then agreed to teach it with him. Although John had considerable teaching experience as a former professor, had facilitated numerous online teaching and learning workshops, and had expertise as a course designer of online courses, he felt that an online teaching experience was an important complement to his profession.

### **Characteristics of instructor interactions**

A comparison of the frequency of John and Phillip's posting show that Phillip posted more than twice as many messages, and while the majority of John's posts were



replies, more than half of the Phillip's posts were initiating new threads. The CMS data for John and Phillip is presented below:

Table 6. Instructor Interactions in E-Learning Design

	John	Phillip
No. replies	31	57
No. initiated	7	31
Total messages	38	88

A comparison of student postings to instructor postings shows that while Phillip posted 18% of all messages, John's accounted for 8% of the total. Combined, instructor postings accounted for 26% of all discussion forum postings.

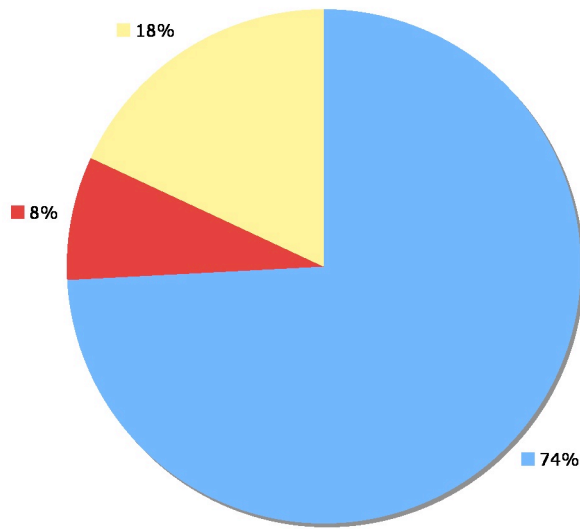


Figure 5. Comparison of percentage of instructor to student postings in E-learning Design

John's message postings followed a distinct pattern for each message. Most of his messages contained all of the following:

1. Acknowledgement of a student posting in form of feedback or encouragement
2. Example of his own experience or statement about the issue
3. Occasional invitation for further discussion or probing with a question

Additionally, many of John's messages included a reference to the co-instructor, in the form of acknowledgement of a contribution by Phillip, showing evidence of a team effort.

John described his own interaction style as “directive” and attributed this to the considerable experience he had as a face-to-face instructor. Although he was aware that students came from a teacher-centred educational context, John didn’t feel that his interactions were being shaped by this knowledge, and instead felt his interactions were more influenced by his f2f teaching style.

*John (interview 1): The fact that they are used to a teacher-centered environment didn’t make me more directive than I would have been, maybe because I am kind of directive [when I’m teaching] anyhow.*

The discussion forum analysis of John’s postings confirm that he did adopt a communicative approach that could be described as directive. Whereas some of the other instructors presented in this study consciously used syntactical structures to present a perspective or opinion (eg. I think, I would suggest, etc.) , John frequently adopted more direct structures.

Message no. 48[Branch from no. 47]  
Posted by John on Thursday, November 17, 2005 00:29  
Subject: Re: Curriculum, Course and instructional design

...It's important to remember to judge each course/curriculum in light of particular needs, learners, the learning culture of a given institution, etc. There may be times when a "teacher knows best" approach is necessary, at least for a portion of a lesson or course. But even that has to done with a view to maximizing learning.

John.

John described his approach to online interaction as the following:

- Be present
- Respond constructively
- Draw people into discussions

In many ways, John's discussion postings were a conscious attempt to simulate his face-to-face teaching approach, to translate and transfer that experience to the online environment. John conceptualized the online interaction space as a virtual classroom, and transferred his understanding of the role of a face-to-face instructor to the online context.

*John (interview 1): I am looking at [the online environment] as helping people to understand the basic concepts. In any course no matter how constructivist it is you are trying to get something across as an instructor. I am trying to facilitate the learning process, whether that is being quite direct.*

John described the form of some of these direct strategies that he adopted in his interactions.

*John (interview 1): Consciously--I don't want to overuse them--but I do use emoticons occasionally. In general it was to be intentional about – 'I think you all have raised some excellent points here; this is a good point' –that kind of stuff. I was affirming. Positive confirmations. That was a general thing I did on purpose.*  
*(Int.1)*

The following posting demonstrates this attention to acknowledgement of student contribution to the discussion. In this example (and others) John used the quote feature of the CMS to quote relevant contributions from two other students (as indicated with the > symbols) and then offers his own comment. In his interactions John frequently quoted passages of student postings, synthesizing several student contributions, or making direct reference to something the co-instructor said.

Message no. 40[Branch from no. 39]  
Posted by John on Monday, November 14, 2005 01:01  
Subject: Re: Getting the discussion started

In message 39 on Sunday, November 13, 2005 23:51, [ED Student A] writes:  
>In message 34 on Sunday, November 13, 2005 15:26, [ED Student B] writes:  
>  
>>So I guess the first stage in a [Croatian]  
>>context would have to be that an instructional designer is a person who  
>will develop curricula and  
>>subsequently instruction with the learners (target audience) in mind.  
>  
> >  
>Hi, all  
>  
>I couldn't agree more with [ED Student B]. But, there's a problem. Although  
>instructional designer is the person who should be developing curricula,  
>he/she can not. Professors are not ready to let somebody else develop  
>their curricula.

Both of these are excellent points. [ED Student B]has pointed what should happen (and does) and [ED Student A] has pointed out the reality with which many of us deal in our daily work. My own experience has been varied. Some professors with whom I've worked have been very much open to suggestions about that can be done to improve pedagogy of on online course. Others prefer to make all the decisions themselves. Sometimes

they make good decisions, and sometimes, well, the decisions aren't so good. As with all things, sometimes it takes time (and a considerable amount of diplomacy) to change attitudes.

John.

John's own experience as an online student was the driver for this communication strategy.

*John (interview 1): Part of it was just a way of letting them know I actually read what they said. The reason why that is important is because a few years ago when I was taking a [graduate online course] course there was an expert in the field [participating] in our course a guest tutor. So we were asked to respond to something she said, so I did and maybe I wrote too much saying 'this is an interesting idea but blah blah etc'. It was painfully obvious she never read what I said and didn't read what a lot of other people said and simply cut and pasted stuff that she had already written into her responses. Which was a complete waste of time. You need to work on that if you are going to be an online facilitator.*

John's facilitation approach could therefore be described as being informed by his own prior and extensive university (face-to-face) teaching experience, as well as his experiences as an online student in a graduate program in Education.

## Themes

It was clear in the first interview that John's first online teaching experience and own instructor presence was shaped by the instructor presence of the co-instructor. Some of the tensions he experienced in this activity system were a result of different understandings between the object, rules, and division of labour in this shared interaction space, which is described in further detail below.

### *Online content as "teaching presence"*

John co-authored the course along with the other co-instructor, and felt that an element of his teaching presence voice was in the course content itself. In this regard, teaching presence and authoring of the content was the first step in the construction of his teaching presence and to some degree, his own positioning in the activity system.

*John (interview 1): As the instructor/author of that along with Phillip, my voice is coming through in the materials that are in print, that are in text. So I see that as part of what I have done already and that might be analogous to me standing up for 20 minutes and talking in a class.*

*I authorized this stuff so I am viewing the text that they have read as almost as an extension of me, if that makes sense. What they have already heard from me, [I*

*am then] going to clarify or not. I am going to see what they think about what I have said [and then] I want them to talk about it. In this case, instructor presence isn't just a discussion; the instructor presence is how I have written this stuff, and how I put it together. In the case of [the Online Academy] it is Phillip and I together and there are places where it is more me and more Phillip but it is me in the text. Definitely if I am a course author then yes, the transmission takes place in the text that I have written. (Int.1)*

### ***Teaching presence in relation to the co-instructor***

John had clear ideas as to how to occupy a shared role, having also co-taught in face-to-face teaching contexts. His interactions in the discussion forum make frequent reference to Phillip, in the attempt to present himself as a collaborative partner to the students. He does this by including Phillip's name and those of the students when initiating his messages, and acknowledging what Phillip had contributed to the discussion thus far.

Message no. 161[Branch from no. 159]  
Posted by John on Tuesday, December 6, 2005 01:00  
Subject: Re: An important change in law

I would second what Phillip has said. However much farther there is to go (and we certainly have a ways to go), it is an important step in the right direction. Given how steeped in tradition universities can be, and how long it can take to make decision, this is certainly positive!



John.

John also introduced discussion activities as a united voice of both instructors, as evidenced by his frequent use of the pronoun “we”.

Message no. 30

Posted by John on Wednesday, November 9, 2005 21:54

Subject: Getting the discussion started

Hi everyone:

For our first group discussion, we would like you to start thinking about course design, who does course design, and the types of people involved in course in an (Eastern European) context.

Think about the kind of person who typically plays this role in your institution and what kinds of skills, tools or approaches does this person (or persons) need to be effective?

The point of this discussion is to work towards identifying the key characteristics, responsibilities and approaches of course design and course designers in a way that makes sense to you in your context. We recognize that the specific job of "instructional designer" or "course designer" does not presently exist in Croatian educational institutions. But whether it does or not, we can describe different kinds of roles, expertise and group interactions that can support the development of teaching materials.

We look forward to discussing this with you!

John's teaching presence also deliberately referenced Phillip as way of showing he had read Phillip's contributions. In fact, John did this nine times of the thirty-eight messages that he posted. Phillip also engaged in this practice but only half as often (12 times of 88 messages).

Message no. 294[Branch from no. 290]  
Posted by John on Wednesday, January 11, 2006 18:55  
Subject: Re: Lone ranger or project management

That is an interesting point, [ED Student C]. You're right of course. Nothing gives you insight into a process like trying to do it yourself. I have a consultant friend who is going to take on a new business partner in her training business. She made the off-hand comment that she would handle the face-to-face training and that her new apprentice would do the "online" component. Now that's all well and fine, but I happen to know that this new apprentice knows next to nothing about putting courses online. Her perception seems to be that putting a course online is nothing more than "a few mouseclicks." When they get to the point of trying it themselves, they will likely find out otherwise.

That said, Phillip is certainly right. The Lone Ranger approach can only take you so far. Sooner or later, budget, time and technical requirements will likely catch up with the Lone Ranger. People can only do so much on their own for so long.

John.

I was curious as to why John was motivated to reference to the co-instructor following a statement and example from his own perspective. In the next segment, John confirms his communication strategy of demonstrating that he was reading the contributions of everybody, including those of the co-instructor and highlights the importance he felt of being part of the conversation.

*Tannis (Interview 1): In message 294 you have started off your question, and what is interesting is that you have offered your own perspective here but then you are coming back to and making sure that you are agreeing with Phillip and aligning with him. Is that sort of what you alluded to earlier—as a way to make sure both of you were aligned with each other?*

*John: That is not what that was. [In this example] I wanted to say something and that was a way to acknowledge that I just wasn't saying it. If you read this you actually know that I read Phillip so this is me wanting to add something. Yes, Phillip said that, we know that. I read Phillip and he is certainly correct and then I just wanted to say it myself again. So it is a code that I actually read this stuff. At this point I am probably not going to contradict Phillip but I am not aligning myself so much with Phillip as much as just letting them know and affirming something that Phillip said and that I agree with it.*

*Tannis: Then why did you feel that you needed to allude to what Phillip posted to?*

*John: Because this way I am letting them know I have read it, I am not just repeating something that has been said. They know that I have actually read what Phillip said. I am making myself part of the conversation, that is the best way of saying it. I want to be a part of the conversation. I do want to affirm that. I agree with this.*

John described his interactions as evolving over time, as a result the subtle positioning of himself as a secondary facilitator, in the presence of a co-facilitator who he perceived as being more knowledgeable and quicker to respond to student queries.

*John (interview 1): In the end I viewed my role more as facilitator trying to draw people out, having input, and certainly putting my two cents here and there. It wasn't instructor A and instructor B; it was instructor 1 and instructor 2. That is no criticism. I am guessing that Phillip was more visible than I was at times.*

The discussion forum shows that the co-instructor actually did post more and that their communication took on different forms. The key difference is that John generally replied to messages, while Phillip initiated many more messages than John. In addition, Phillip's postings were generally longer than John's. John's interview confirms my own observations of Phillip's interactions.

*John (interview 1): I think he posted more. I had a reasonable instructor presence in terms, but I may go for three to four days without posting, depending on the structure and my circumstances over the weekend and stuff like that. Phillip's responses were often responses to specific questions. Of the two of us I was probably in there more cheerleading and Phillip was probably more actual specific directions and/or content about a given thing. I was fine with that. Also it is just the way it evolved; once Phillip said something there is no need for me to repeat it.*

John also had the impression that students were directing their communication more to Phillip than to himself.

*John (interview 1): There was a fair bit of email in the course itself, but often students would ask Phillip things instead of me.*

*Tannis: But you weren't getting the questions coming to Phillip, they were only emailing him?*

*John: Yes. Sometimes they would email both of us and I would respond or I would say to Phillip did you respond to that and he already would have or I did.*

John was particularly sensitive to how they were positioning themselves discursively through the use of pronouns.

*John (interview 1): Then there is the added challenge—because I was the new guy I didn't necessarily want to suggest things, and I felt like I needed to be on the same page as Phillip. I wouldn't necessarily respond right away and Phillip might. And in assessment, there I honestly think that Phillip and I should have worked out ground rules, avoiding the pronoun "I". So it is either "we" or just not saying, not needing a pronoun, [for example] "in this kind of thing this might be helpful", "this was great" as opposed to "I think that this is great". Because then who is the "I"? There is a good chance they would assume it is Phillip. I tried to avoid that so when we put together our comments, I was getting rid of I's.*

*When Phillip marked Assignment 2, which he went ahead and did because of email problems here at [Canadian University], it was a bunch of “I’s”. So you see already [that] they are probably assuming that is coming from Phillip. So if you are going to have dual assessing you need to be careful to avoid that. So I wasn’t as present in the assessment as Phillip was partly because of that. At times Phillip wrote more, at times I did.*

John addressed this tension by continuing to ensure he had a voice by maintaining an instructor presence, but never really felt like he was able to gain an equal positioning of that of the co-instructor.

*John (interview 1): At other times, you can’t necessarily tell from the post, but I am posting to make sure I have a voice there, that people are reminded that I am there. I know it is not going to change it, I know that Phillip is going to be the one that looms largest in their mind but I am still trying to have a presence. I am not just going to be pushed to the periphery and left there. Part of it was for me if I am being called an instructor there, whether the secondary one or not, I am getting paid to post and to contribute to the discussions. I felt a responsibility and I looked for my [opportunities] and tried to make contributions either big or little just to have a voice because whether they viewed me as secondary or not I thought it was my responsibility to post and make contributions where I could.*

*Could things have been done to put me more at the centre, probably. Getting rid of the pronouns in the assignments, making sure that people are copied on emails.*

Despite this tension, John felt grateful for the presence of the co-instructor, suggesting that he perceived the sharing of facilitation as an affordance.

*John (interview 1): Phillip would for example actually give more information than I would either because he is more familiar with stuff or he has more experience.*

Yet, ultimately this lead John to feel that he occupied a secondary role to the co-instructor.

*John (interview 1): ... it still seemed to me a lot of the time by default Phillip was sort of the primary instructor. He knew them, he had a relationship with them, he saw them face-to-face and quite frankly at this point he knows the subject material better than I did. So in the end I viewed my role more as facilitator trying to draw people out, having input, and certainly putting my two cents here and there. It wasn't instructor A and instructor B; it was instructor 1 and instructor 2.*

The struggle to have a voice and to be perceived as an instructor of equal importance and value also had an influence on his teaching presence. John was caught in the dilemma of simply posting to make an appearance or actually contributing something of value to the discussion.

*John (interview 1): Then you think well there is also this issue if someone gets to it first, I want to avoid going on just for the appearance. Sometimes I honestly did post just to be there even though Phillip had said it well. I thought, well I need to be there, if this is a dual instructor thing—I'd better put in my two cents. Although it often didn't seem like it mattered.*

John's experience demonstrates how an instructor's interactive decisions and own teaching presence may be constrained by the presence of a co-instructor, particularly when there is a positional hierarchy within the activity system generating tensions between subject, community, rules, and division of labour.

### ***Technological constraints***

The CMS created several constraints that served to exasperate the problem he was experiencing with sharing the teaching space with the other instructor, as well as create a workload issue for the instructors. The CMS email system didn't allow the option to CC,



and neither the students nor the instructors resorted to solving this problem by addressing the email to multiple recipients.

*John (interview 1): It seemed to me that it was clear that it was a challenge. First of all ( it is partly a WebCT thing), and it irritates me to no end that I send a response to students and I can't CC Phillip if we are using internal email. Phillip can't send stuff to students and CC me. You have to go back in and send it again which I actually didn't do a lot of times and neither did Phillip. ...Sometimes (the students) would email both of us and I would respond or I would say to Phillip: 'did you respond to that?' and he already would have or I did.*

*...The technology gets in the way, if I get an email I have to forward it to Phillip etc. Whereas if you are face-to-face you are usually both getting asked the question. Co-teaching too in a face-to-face environment might be one person is responsible for the first half and one person is responsible for the second half. So it is a little different. So it probably more stems from that, do I have a problem with co-teaching, no – actually I like it, it shares the load. You have to be more intentional about things I think.*

John ultimately described the online teaching experience as limiting, again measuring it against his face-to-face teaching experiences.

*John (interview 1): ... it is limiting. Imagine if we were having this conversation over email. If found that with that recent study I did, telephone was good, face-to-face was better. I could read people better face-to-face.*

### ***Identity***

Much of the tension that John experienced was a result of an inability to reconcile an identity as an experienced face-to-face instructor in an online teaching context that constrained this identity. This included what John perceived as subtle positioning of himself by the co-instructor (and the technology, to some extent, previously discussed) as a secondary instructor. Therefore, although the environment that John shared with Phillip provided certain affordances, it wasn't enough provide John with the satisfaction he had experienced in face-to-face teaching.

*John (interview 1): Was I pushed to the periphery? Yes. Did I understand why? Yes. Did I resent it? I accepted it and tried to do things. Would I want to be a co-teacher in a course again, I don't know. I prefer being the guy and maybe it is an ego thing but it is an easier thing to administer. I loved having him helping with the grading though.*

John also suggested that the face-to-face environment afforded him a different teaching presence, even though he acknowledged that the online environment provided some of the same characteristics.

*John (interview 1): I can be as warm as I can be and as supportive as I can be, you can be very supportive in an online environment. In fact you can probably be as supportive in an online environment as you can as a face-to-face environment.*

*Tannis: How do you think you are different in face-to-face?*

*John: I just think the face-to-face environment is a more fully orbbed experience. You know what? Maybe it has to do with how you view yourself as an instructor.*

In particular, this last statement hints at the role that identity has in influencing the quality of an instructor's experience. John seemed unable to negotiate a teaching presence that was congruent with his face-to-face teaching experiences, beliefs, and performance that contributed to his identity as an experienced instructor.

### ***Sociocultural considerations***

Although John was aware to some degree of the students' sociocultural context, he didn't feel it had any significant impact on his instructor presence. When John and

Phillip experienced some student non-participation, John felt it had more to do with the constructivist approach to the course, and less with the facilitation style, even suggesting that his own (directive, teacher-centred) teaching style was probably compatible with student expectations.

*John (interview 1): It might have been the design of the course but we were going for a fairly constructivist design anyway, so the resistance that we had was to the whole thing if anything. In terms of the facilitation, I didn't do anything different. For example when students asked for feedback on their assignments that were in progress I did the same thing as I would have done here. In that case I told them what I thought needed to be fixed, added, how to proceed, that kind of stuff. The fact that they are used to a teacher centered environment didn't make me more directive than I would have been, maybe because I am kind of directive anyhow.*

John's knowledge about the context of the students was based on what he had heard from myself and Phillip (who had traveled to Croatia to meet the cohort and facilitate the orientation) and his one meeting with the students via videoconference.

*John (interview 1): I didn't know as much as you because I hadn't been there. We had an initial video conference and I remember thinking at the time, viewing the group and thinking, boy this isn't a very talkative group. In the video*

*conference they were just kind of there, sitting there, and it turned out to be the case in the discussions as well.*

John didn't think that the different sociocultural context of the students (in relation to his own) influenced his teaching presence a great deal, but he did feel that he was sensitive to some aspects of their context based on assumptions that he had about it.

*Tannis (interview 1): Based on what you knew about the context, how did that influence how you facilitated?*

*John: It didn't. I am still going to be the same person, my personality and such, whatever comes across. Well did it influence – yes, maybe I am going to use North American examples. I am going to try to have them bring up examples that are relevant to them. I am certainly going to avoid any politically sensitive examples of things.*

In one of his discussion forum posts John makes reference to the Lone Ranger and goes on to explain the origin of the saying. John explains the level of consideration he took prior to posting it.

*John (interview 1): That was one of the few cultural references I allowed myself. I thought very carefully about that. I thought I will include it, explain what it is and if they really want to know they can look it up on the internet.*

The participation of the students in the discussions was highly variable. Of the nineteen students, four never posted at all, and four posted less than five times in sixteen weeks. Therefore while almost fifty percent of the class almost never posted, one student posted 81 times. Since John's group was experiencing low levels of participation from several students, I was curious to know whether this was a concern for him, and to what degree he was aware of the potential linguistic constraints. John indicated in his interview that he was aware of it, since he said that he consciously aimed for simple, jargon free language as much as possible in his posts, but ultimately he didn't attribute non participation to being a language issue, so much as a characteristic of the group.

*John (interview 2): I tried to be aware of (the language constraints); I don't know how successful I was.*

*Tannis: Did it have any affect on how you felt about the lack of participation?*

*John: No. The reason it didn't is because of the experiences I have had in face-to-face classes where you can teach the exact same thing one semester and have*

*all kinds of participation, positive responses and you can do virtually the same thing the next semester to a seemingly similar group of students and it will go over like a lead balloon. There are certain things that you just cannot account for with learners.*

In fact, John attributed non-participation largely to the course design, which he felt could have been more effective had better discussion forum questions been asked.

*John (interview 1): No matter what you ask you are still not going to draw people out as much, particularly if it is a group that is not very talkative, I think that is what it looks like to me, so I think that when we revise the course we will do our best to make our discussion questions more focused...*

*We needed to involve them in a way that wasn't just "what do you think about this case"? I can think of ways I would have done it differently. For example (in) just phrasing the question. "You are a case designer that has been given the task of redesigning this, how would you do it for your institution". (The questions we asked) weren't personal enough, I think.*

*My opinion in all of this [is that] it has been established pretty clearly that the quality of discussions depends on the questions posed. No matter how much you try to draw people in the discussion, if it is not a great question, it is not a great*

*question. Combine that with the fact that this semester is rolling along, people are getting busy...I could be wrong, so many times common sense stuff doesn't necessarily hold. I am just wondering if in this case that was the thing especially with a group that is reticent to talk in the first place.*

### ***Competing activity systems***

For many distance education instructors, teaching online is undertaken in addition to other jobs and contracts. In fact, in this study, this was the case for all but one instructor, William. Therefore I was interested in how instructor's teaching presence was affected by the many other competing activities of the instructors.

I knew that John often juggled several contracts in addition to his full time job, and busy family life. In this segment John confirms that his teaching presence was affected to some degree by these activities.

*John (interview 1): That is why there would be 2-3 days, I think one time it was 4 days where I didn't log on because life got in the way. I almost thought next time I teach an on-line course I may put a 4 month sort of thing in my electronic calendar thing saying log into course today. In fact I found myself even doing that, I would type up and say make sure you check in on course just to be more intentional about it.*



## **Discussion**

The online context did not provide the space for John to perform or author an identity that was congruent with his well-established identity as a face-to-face instructor, and with his conceptualization of the interaction space as an online classroom. John believed that the technological constraints of the environment, in addition to the discursive practices of the co-instructor, served to position him as a secondary instructor in this teaching experience. This positioning served to influence his teaching presence in numerous ways, including:

- posting less frequently
- adopting less efficient strategies to determine whether one on one communication with a student was needed

John described his teaching presence to be influenced by his own face-to-face teaching and experiences as an online student. He engaged in the practice with the pre-established beliefs that he should be present, respond constructively, and draw people into discussions. Analysis of his postings confirm that John consistently adhered to these goals, underlining the role that instructor beliefs have in determining instructor interactions.

In this teaching experience, non-participation of students produced a tension between the object, rules, and community components of the activity system. John

attributed this tension to the course design, specifically, the quality of some of the discussion questions. John's addressed this tension by shifting his teaching presence/interactions to ask more questions of students to enable them to participate when the discussion no longer engaged them.

The evidence from this case demonstrates how teaching presence, specifically the interactive decisions of the instructor, are a result of moment-to-moment negotiations and adjustments that are as much determined by the instructor's own participation as well as the students, co-instructor, and tools that shaped the interaction space.

## Joanne

### **Background**

Joanne was in her early fifties, and had spent over thirty years teaching in higher education. She had a PhD in Adult Education, and was employed as an instructional designer at a Canadian university in a distance education unit. She also had experience teaching online in a graduate education program.

Joanne and I both were contracted by the Online Academy to teach this course in its inaugural offering.

### **Case data**

- Two instructor interviews
- Informal conversations with Joanne
- Student formative evaluations after each module
- Discussion forum postings of both instructors
- Discussion forum postings of students
- One student interview
- WebCT quantitative data
- Course documents

## **Course design**

The course was 15 weeks long and lead to a certificate in E-learning Tutoring, administered by the Croatian higher education organization of which the Online Academy was part. Joanne was the course author for this certificate, which was designed to allow students in the Online Academy with a special interest in e-learning teaching an opportunity to obtain a specialized certificate in this area. The Foundations certificate (in which Linda and I taught) was a prerequisite for this course.

Students in this certificate were composed largely of professors in higher education and K-12 teachers, but there were some educators and trainers from corporate and NGO contexts. Because of my involvement in other areas of the Online Academy, I was present for the f2f orientation in Croatia and was therefore able to meet the students in person. Joanne participated in a scheduled videoconference between the Croatian students and the instructors, which gave her and the students an opportunity to introduce themselves electronically. However, it wasn't until Joanne went to Croatia for the closing ceremonies and conclusion of the course that she was actually able to meet the students in person and put faces to them.

The E-learning Tutoring certificate took place over 15 weeks and was designed to require eight hours of student time per week. The organization of course topics are included in Appendix E. There was a two-week break from course activities between Module 4 and 5 due to the Christmas holiday.

As in all of the Online Academy courses, participation in discussions were a graded activity and considered to be an integral part of the constructivist approach to the course. The purpose and rationale for the discussions were explained in the course documents as follows:

*The discussions are a critical part of the course. We strongly believe that ideas and concepts are better understood and become more relevant to you through the process of discussion, argument and clarification, and that your participation in the discussions will enhance your learning. Our experience confirms that, in general, learners who participate fully in the online discussions not only learn more but also get better grades.*

*The discussions are primarily intended to enable you to explore how the concepts can be applied to different e-learning contexts. As noted earlier, learning can be enhanced when participants interact and share their ideas and experiences about the topics under discussion.*

The discussions formed part of 30% of the course grade, with three other assignments sharing the remaining 70%. As in the Foundations certificate and the Course Design certificate, each of the three assignments were scaffolded such that assignments 1 and 2 formed part of assignment 3.

## **Perspective on the problem**

Joanne was selected because of all the cases she had the most online distance education teaching experience, having both developed and taught online courses for approximately 10 years. Like several of the other cases, she occupied a role as an instructional designer for distance education. However, she was also the only case to have a PhD in Adult Education. Therefore, Joanne was highly qualified both academically and professionally to teach this course.

## **Characteristics of instructor interactions**

The CMS data shows that there was a considerable difference in the quantity of message postings in the discussion forum. Over the course of 15 weeks, Joanne posted a total of twenty-two messages while I posted seventy-one.

Table 7. Instructor Interactions in E-Learning Tutoring

	Joanne	Tannis
No. of replies	11	41
No. initiated	10	30
Total messages	22	71

Closer analysis shows that Joanne had uneven posting activity over the 15 weeks, and never posted more than two messages on any given day.

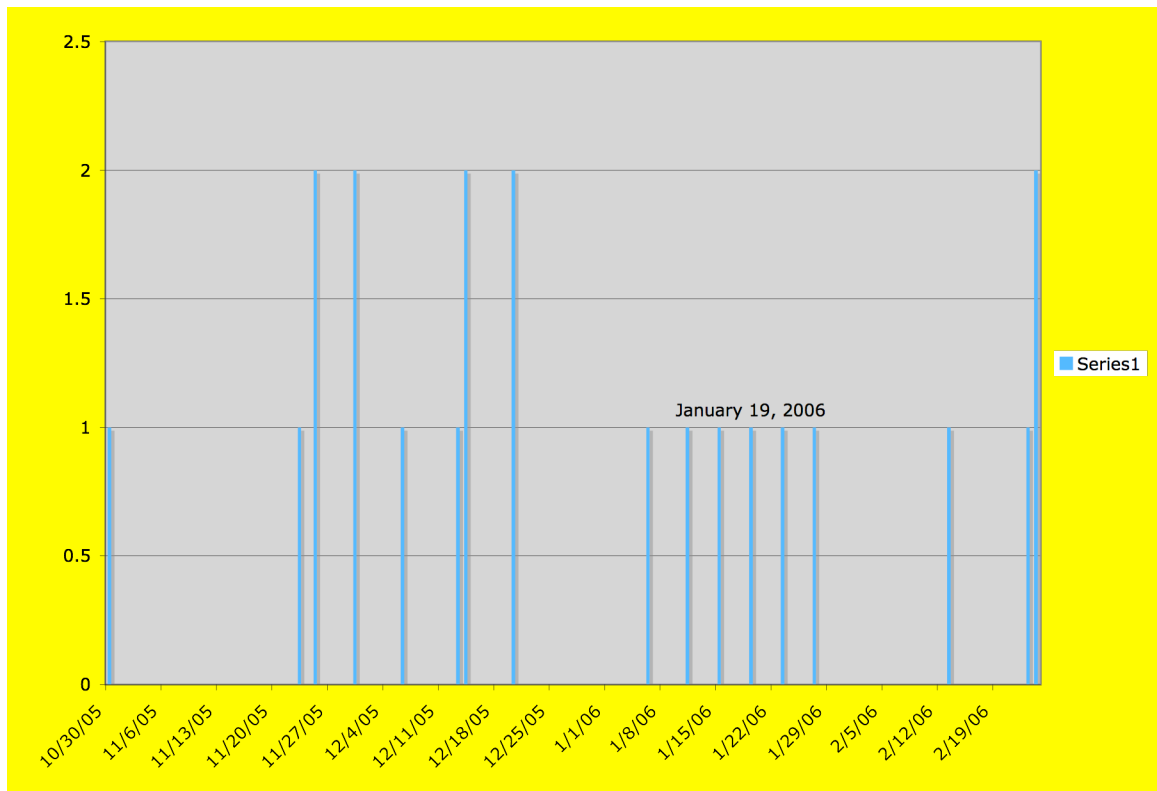


Figure 6. Joanne’s number of posts by day

### *Establishing a personal voice*

Joanne had a facilitation style that was very personal and seemed to speak from a position equal to that of the students. She frequently brought in her own examples of her own experience, expressed encouragement and maintained a personal style of communication. The following message posting provides good evidence of this style.



**Message no. 71**[Branch from no. 70]

Posted by **Joanne** on Friday, November 25, 2005 22:25

**Subject: Re: Using concept maps to aid planning**

It is reassuring for me to see that the 2 of you have found this tool useful. I know that I struggled with it the first time I used it -- but in the end it changed my approach to how I would introduce content to students.

I am happy to see that you are finding other applications for the tool of mind mapping or concept mapping as well.

Joanne explained that it was important to her to be seen as a person and not just at text message.

*Joanne (interview 1): To me I always found it very useful to have teachers who seemed human and that things weren't always just easy. Especially with adults I think it is important to let them know that things just aren't simple the first time.*

She felt that this was in keeping with her identity as an adult educator, defined by both her PhD in this area as well as many years teaching to adults. As she was the course author, the course design and content was also shaped by this important belief.

*Joanne (interview 1): I even wrote the course that way by using a lot of "I". I think it is important that we connect with people at that personal level. In this very impersonal, virtual environment, I feel it is very important to say 'we are humans here and let's remember to be personal'...*

In this way, Joanne consciously attempted to overcome what she felt was a constraint of the online environment by adopting a personal voice in an attempt to render the online context more human and personal.

### *Awareness of the co-instructor*

Joanne also used “we” to refer to herself and the co-instructor (myself), suggesting she considered it important to present herself as a co-instructor team. In my own interactions as co-instructor, I wasn’t as careful as Joanne in doing this. In reflecting on the reasons for this (in contrast to my teaching experiences with Linda, with whom I always included in shared postings) I contribute it to what I perceived was Joanne’s limited presence in the discussion forums, and uncertainty with how she, as course author, perceived her role in the discussions.

## Themes

### *The importance of understanding who the students are*

Joanne's understandings of the students were constructed based on what various people involved in the project (such as myself and the project manager) had told her about them, as shown in the following interview excerpt.

*Joanne (interview 1): I definitely thought of them as being older, partly because of the way that they were described to me by other people. So it was very interesting to find out how young they really were.*

The participants in the Online Academy ranged in age from mid twenties to mid forties, and almost all of them held high level positions in education, NGOs, or government.

Joanne also expressed how her lack of understanding of who the students were had an influence on her teaching presence. The names of the students were so foreign that she was unable to distinguish their gender, further disabling her from constructing some sort of idea of who the students were. Joanne saw this as a constraint that didn't get her off to a good start.

*Joanne (interview 1): To be honest I didn't even know if they were male or female. So you are trying to facilitate a conversation and the first weeks I didn't*

*know anything. So it is horrible, it is really not a context. So I would just construct "Student A", so they were just generic students. When you start teaching generic students you are not off to a very good start.*

Joanne further elaborated the extent to which the lack of knowledge about the students affected her own teaching presence. Throughout her two interviews Joanne continually expressed regret and disappointment in her own lack of discussion forum participation.

*Joanne (interview 1): It was only when I started to see their assignments, started to see them as humans trying to work out something and knew something about the context that they were working in that I started to differentiate between this student, that student and the other student. Their postings online don't give you that much information especially when they know each other in other ways. Maybe if they hadn't known each other either, it would have been more of an even playing field. They kind of knew each other and you kind of knew them and I was the only one who didn't know them at all. So I just thought well okay this is kind of a party I am really not at.*

Joanne contrasted her initial conceptions of the students with how she felt after she was able to meet them for the first time at the closing session.

*Joanne (interview 1): That was probably one of the significant “aha!” moments for me was that I realized when I met them that I would have done everything differently. I realized what kind of sense of humour they had, what the personalities were, what the interests were. I had a picture, which has actually made me now believe that doing blended learning in cases where it is possible is a very powerful thing or adding videos. Have the students show who they are in non course-driven ways early in the course or something. As much as we would like to pretend it doesn’t, having some sense of the group is more than just what they say, where they have come from. It really does create a different dynamic. Certainly that dynamic was missing for me because I had no idea.*

Joanne seemed to be unable to negotiate this aspect of her teaching presence—her ability to interact with the students seemed to rely on having clear understandings as to who they were as individuals. Joanne explained that she felt that face-to-face teaching was a context that enabled an interest in students as people, and the ability to understand students as people was essential to being able to interpret and respond to not only their interactions but their assignments—why they would chose a certain topic, or approach an assignment in a certain way. Joanne attributed some of the desire to “know” students to her background teaching adult learners in one-on-one situations, and felt that her own teaching beliefs and theoretical views of teaching converged with this preferred practice.

### ***Course author or instructor?***

Joanne expressed how she didn't feel she experienced the course as an instructor so much as a course author who was largely interested in seeing how the students were engaging with the course and the activities. She acknowledged that an instructor's role is variable depending on their own interpretation of the context and their positioning within it.

*Joanne (interview 1): ...I cannot approach this course from the perspective from 'I was the instructor in the course' because really to me I was the creator of the course. I was the course writer. I was the designer. The teaching role for me was really unfortunately minor. I think that if I taught online all the time I would think of myself as a teacher but it would have to be a course that I actually wrote because I know that I have been a facilitator of courses that were written by other people and that our input was only to be the discussion moderator. I have not felt like a teacher in those courses, I felt like my role was to facilitate and moderate. So it is really complicated. I think that a teacher's role is completely tied to the context of the teaching or their impression of their role.*

On several occasions, Joanne expressed regret in not being able to feel like she was successful in this teaching experience. She felt her late entry into the course impeded

her ability to feel like she got to know the students, and talked about feeling that her own interactions in the discussion forums were “irrelevant to the course”.

*Joanne (interview 1): I got in late because I wasn't available and so I started late. When I was there it felt like very much like an outsider coming in. I didn't know the students. I didn't do any sort or the early first week community-building emails to the students, I had missed that whole part. So it was like being a guest in the course from the teacher perspective. That never went away until I started grading some of the papers and then I started to think about the students more. Then it culminated with the end and getting to actually meet them and then I wanted to start all over again and do the course properly but then it was too late.*

*In fact once we decided that I was going to grade the final assignments I didn't even attempt to get into the discussion in the last parts of the course which gave me great relief because it was just easier to focus on grading papers than it was to try to digest everything they were talking about and come back with something intelligent to say online. I would say that my facilitation skills on this course were pretty much down at the bottom.*

Joanne and I negotiated a division of labour two thirds of the way into the course that had me facilitating the discussion forums and Joanne responsible for grading of the assignments. This arrangement was a win-win situation for both of us, since it alleviated

both of us of a task that we were less comfortable with. Yet, I wondered about Joanne's understanding of her role as an instructor—I wondered why she didn't feel she had the agency to overcome this slow start, by finding a way to engage more in the discussions and integrate herself into the community. In her interviews, Joanne suggested that she was more invested in her role as the course author, especially since this was the first time she found herself in a course author position.

*Joanne (interview 2): I think I wanted to see how students went through my material. I had a great sense of that ownership. It is the first time I had written an online course, I wanted to see what happened. I guess I could have seen that without actually being on the hook to facilitate but I guess in some ways I also wanted to meet them. I knew that going to Croatia was the only way I would do that is if I was actually teaching the course. And I wanted to see what this all looked like. So there motivations that were very odd and competing..*

These competing motivations are described as primary contradictions in an activity theory view. Joanne was facing a primary contradiction at the level of the object of the activity—to engage in the activity as a course author or as an instructor. The positioning she adopted in this course seemed to be driven by her own identity as an adult educator and her relationship to the course as a course author.



### *Negotiating the online interaction spaces*

In keeping with her views on adult learning, Joanne conceptualized the interaction space as a community in the making, but acknowledged that this community doesn't always take shape.

*Joanne (interview 1): I have students say emphatically that learning online is not a community. I think it is because we define community in different ways and people don't realize that they do actually form some sort of relationship although it is not the same as when you see people. When the course is over most of the time everyone disappears so it is not like you have long friends. Most students who take classes don't either unless they take several classes together... Each time I am surprised if there is sort of a sense of group effort, that always surprises me.*

Within this "community in the making" Joanne seemed to have a clear idea as to the type of teaching presence that she should have, but ultimately time constraints prevented her from being able to actualize it.

*Joanne (interview 1): Ideally what I would like to think that I can do (and in another context I think I have done) is to carefully read what people have posted and actually attend to what they have posted so that they feel what their*

*contribution to the course is actually valuable to everyone and to bring it all forward. So it is not that I answer every person's posting but to read and have an overview. Just like you do when you stand up in a classroom, you hear everyone's comments and then you finally weigh in at that moment when you think that people's interest or focus is flagging. That to reposition and refocus everyone to go onto the next level. ...I think the role and the role that I would like to take on if I actually get myself engaged in the teaching of the course is to be able to give it that time.*

Interestingly, despite the fact that Joanne's primary occupation as an instructional designer for distance education involved preparing faculty to teach online, she herself found it difficult to find strategies for creating an online community.

*Joanne (interview 1): Maybe that is my problem is that I don't have strategies that I have developed for the online world. Typically in every other course I have taught except this one, [I send] out welcoming emails individually to the students ...I don't even have advice to offer to people who are about to teach an online for the first time regarding keeping or creating a community of inquiry if it is not happening.*

Joanne's own position as an instructional designer, her background in adult education, and her involvement in several international distance education projects likely contributed to her awareness of the complexities of the practice of online teaching. There is also evidence that Joanne's beliefs about teaching and learning shaped her teaching presence. Joanne felt quite strongly that the "guide on the side" approach was important, and considered herself a strong advocate of constructivist approaches.

*Joanne (interview 1): I think that the guide on the side is the model that I would like to think that I use ... I do honestly believe that students tell each other more interesting things than teachers tell students often. That just doesn't happen accidentally. So it is the time and attention. It is actually treating discussion in the online course is probably the most important part of the course because there is often very little reading. The courses are meant to send people out to find things and bring them back and do interesting things with what they have found and to push learning in that way. What they find [is that] we have to be prepared to stick handle. We don't always have the answers but we have to be prepared to be secure enough in ourselves to look at this as an opportunity and not as a challenge to our authority. It does require people to be a different kind of teacher and I think that is where these courses are right now.*

### *The constraint of time*

Joanne suggested that some of the tension she experienced in facilitating the discussion forums was a result of the considerable time constraints that online instructors often face. These constraints are largely the time needed to read and compose messages, and to provide timely feedback to students. Joanne contrasted the pace of online teaching with that of face-to-face, and acknowledged how the ambiguity of time created by the asynchronous online context presented a challenge.

*Joanne (interview 1): You know that is the most difficult, once the course is written and it is sitting there for everyone to participate in and you don't have to go there three times a week for an hour or whatever it is. Making this enough of a part of your day that you actually say that I am teaching and I am going to spend half a day, twice a week teaching is something that we tend not to do or I know a lot of people that teach online that tend not to do it.*

In particular, she highlighted how the supplementary position of online teaching to online instructors' day jobs creates considerable tension. In activity theory terms, online teaching constitutes a competing activity system to an instructor's other professional practices. In fact, Joanne herself had never taught an online course that wasn't "over and above" her real job, highlighting a dilemma that is often experienced by online instructors who do not hold professorship positions.

*Joanne (interview 1): [Face-to-face teaching] is finite. You know when you are supposed to be there and I am still struggling with what do I tell people who are teaching online for the first time. Almost all of us are doing this off the sides of our desk. [How do you] actually give it the time that it deserves to have and treat it as a serious teaching function?*

Joanne's idea of good facilitation also presented a constraint in time. The care and attention she took to in constructing her interactions affected not only how much and how often she posted but also what she achieved in her teaching presence.

*Joanne (interview 1): I feel it is necessary to not just post whatever I think at the moment, I feel that if you are going to say something you need to have poured over everyone else's work and the course material again and figure out how you are going to meet the learning objectives or help the students meet the learning objectives. It is just a huge task.*

*Tannis: It sounds like you are very analytic in your approach then as opposed to spontaneous?*

*Joanne: Yes, I think you have to be really. You teach spontaneously once you have done all the good analysis. If you don't do your homework, then it is not*

*good. It doesn't work. Teaching is three quarters intuition but the one quarter of planning is absolutely essential so that the intuition can happen. Good teachers don't magically produce good courses, they work at it.*

In this last statement, Joanne reveals an understanding of an instructor as a “producer” of a course, adopting a position of an instructor who not only facilitates but is engaged in providing all the necessary elements for a good teaching and learning experience.

## **Discussion**

Joanne stated repeatedly in both interviews that her teaching presence was influenced by several constraints: lack of time, late entry into the community, and the inability to step out of a role of course author evaluating her own work. However, having conceptualized the interaction space as a “community in the making”, the most significant factor influencing her teaching presence was the inability to “know” the students as real people, and therefore be in a better position to address their individual needs and interests. I understand the importance of this to be tied to Joanne’s own identity as an adult educator as well as her inability to adapt her well-formed face-to-face teaching practices to the online context. Therefore, this case highlights how instructor’s identities are an important mediator in the negotiation of teaching presence, since they

influence how an instructor engages, or believes they should engage, in the activity system.

Linda

### **Background to the case**

Linda was in her late thirties and employed at a Canadian university as a course developer. She was also a PhD candidate in Education at the time of this study. Linda had more than ten years as a course developer and instructional designer for distance education and specialized in the design of online learning contexts.

This case draws on two teaching experiences: a course entitled “Foundations of E-learning” (as part of the Online Academy) and Teaching and Learning Theories (which was part of the Masters in Education at Metropolitan University in Chile). This case discusses both of these experiences as a way of informing the negotiation of teaching presence from a sociocultural perspective.

### **Case data**

- Two interviews with the instructor
- Instructor discussion forum postings from both courses
- Researcher notes from informal conversations with Linda over the course of these two experiences
- F2f and chat interviews with students in online academy course



- F2f interviews with the project coordinator in online academy course and the metropolitan university course
- Researcher-participant observations of the interactions
- Periodic student surveys (online academy)
- CMS quantitative data

### **Course design**

Linda was interviewed about two teaching experiences: the Online Academy in Croatia, and the Masters of Distance Education in Chile. Both of the courses that Linda taught were co-taught with me, therefore my perspective of this case is informed by my role as a researcher participant. During the teaching of the two courses I had extensive contact with Linda. We talked daily about the experience, analyzed events thoroughly, and were reflecting together constantly on the process.

### ***Online Academy***

Linda and I were co-authors for one of three modules of a fifteen-week course entitled “Foundations of E-learning”. This module covered theories related to teaching and learning, with a particular emphasis on the online teaching and learning context. We were then assigned to teach the course together.

The course was constructed around assigned readings, discussion activities, and a three part assignment conducted in stages and culminating in a final submission. Linda and I had separate groups of students and separate discussion spaces for the activities open only to the members of our respective groups, but we shared a forum for announcements. Students also had a shared informal discussion space called Student Café.

### ***Metropolitan University***

As with the Online Academy, Linda and I were contracted to author an intensive four-week course on Teaching and Learning theory for a new Masters degree in Distance Education at Metropolitan University. The content of the course covered the foundational educational theories, and the discussion forums were structured in the following way:

Unit 1, Week 1: Students post biography and engage in a class discussion. Students were required to respond to two posts of other students.

Unit 2, Week 2. Group discussion—no instructor involvement

Unit 3, Week 3: Group discussion—no instructor involvement

Unit 4, Week 4: Group discussion—no instructor involvement

Question and Answer forum, Weeks 1-4—instructors and students could respond to questions

Announcements, Weeks 1-4—only instructors could post in this forum

Each unit had a Question and Answer forum available for everybody's participation, and we were frequently engaged in these forums, each one averaging approximately 40-50 total messages per week. We invited students to ask any questions about the content or the process, and stated that even though the instructors were monitoring this forum and were there to respond to questions, we encouraged all the students to help each other and respond to each others' queries.

Both the Online Academy and the Metropolitan University course adopted a constructivist approach to the design, in which formal discussions formed a significant part of the course grade and student participation in these discussions were essential.

### **Perspective on the problem**

Linda was the third person to be selected for the study and interviewed. Linda was selected because English was not her first language, and because she was a co-teacher with me in two international courses—the Online Academy in Croatia, and the Metropolitan University in Chile. Linda's first language was Spanish, and the Metropolitan University course was taught by both of us in Spanish. In this case, she was positioned to teach alongside with somebody for whom Spanish was a third language, and I was interested in not only how teaching in first and second languages might result

in different online teaching experiences, but also whether a co-teaching situation with that constraint created tensions and opportunities.

Linda had extensive experience in educational technology, both in Mexico and in Canada. She had worked at several universities in Canada in key roles that required significant experience not only with educational technology, but with instructional design and extensive knowledge of educational learning theories. Although English was Linda's second language, and she was extremely fluent in this language, appearing to communicate effortlessly. She found writing in English a bit more difficult, and wrote with a bit of an 'accent' at times, but this did not impede her in any way professionally, and was barely observable by somebody who didn't know her.

At the time of the Metropolitan University experience we were both working full time at a large Canadian university and were in our last week of our tutoring contract with the Online Academy in Croatia. Since the Metropolitan University experience immediately followed that of the Online Academy, and it was an important opportunity to observe how Linda compared and contrasted these two experiences.

### **Characteristics of instructor interactions**

Course 1: Foundations of E-learning, Online Academy (15 weeks)

Table 8. Instructor Interactions in Foundations of E-Learning

	Linda	Tannis
Total initiated	45	57
Total replies	75	94
Total posted	120	151

Course 2: Teaching and Learning Theories, Metropolitan University (4 weeks)

The CMS used in the Metropolitan University course does not make it possible to see how many messages were initiations or replies. However, since the Metropolitan University course had two distinct interaction spaces, I've presented the total for each of these spaces.

Table 9. Instructor Interactions in Teaching and Learning Theories

	Linda	Tannis
Total contributions to Unit forums	46	14
Total contributions to Announcement forums	12	4
Total messages	58	18

Linda's interactions are much shorter posts in the Metropolitan University course, but are very frequent, on average 15 per week.

In both of the teaching contexts, Linda brought a very concrete conceptualization of the online interaction space and desired outcomes for the discussion. She describes it primarily as a learning activity space and distinguishes it from the other interaction spaces that are part of the course design.

*Linda (interview 1): I think for me discussions [are] really a learning activity... the discussion is just a way for the students to engage with the content. ... I see that as a learning activity and I treat it as a learning activity and that is the way the students get to engage with the content and with each other. I see it more as an activity that involves collaboration and inquiry.*

Although for Linda the development of a community of inquiry is an important goal of teaching presence, she gives more importance to an outcome of student learning as a result of engaging with the content and with other students.

*Linda (interview 1): I don't produce discussions there for them to build community, I put the discussions there because I want them to engage with the content and with each other. [For example] engage with this reading and then come discuss it with someone else and justify your views and talk to someone. A result of engaging with the content there is engagement with students and building that common understanding of who the other person is—that is a by-product.*

Linda also had a clear idea of the trajectory that interactions should take over time, and made an important distinction as to when social messages left off and more cognitively challenging engagement should begin. Linda described her understanding of her instructor presence in terms of Pratt's (2000) teaching perspectives, highlighting her own classification as developmental as opposed to simply nurturing. This is evident in how she describes her goals for the students, evidence that Linda had clear outcomes in mind in her instructional practice.

*Linda (interview 1): The social part is just to enable the cognitive. The reason why the students are there is to learn. If they build a community for them to support their learning, that is excellent and I will support that and I will make the best environment possible for that to happen. If they make good relationships and the environment was positive that is even better because then the learning of the content is going to be better. But I definitely think that my whole purpose is one of developmental and not of nurturing. The nurturing is to support the cognitive and not the other way around. I enter the course and I provide positive feedback for the cognitive to happen but the purpose of the discussions for me is cognitive. I want those people to really become good instructional designers or educational technologists. If by doing so they have to communicate with others and discuss ideas and the environment has to be a positive one to happen, I will make it happen. At the end of the day it is building knowledge and building understanding*

*and meaning about what being an educational technologist is all about and that it is about collaboration and that is about communities.*

As the co-instructor, I was surprised by this explanation, since I realized that we shared different objects for our teaching presence. I didn't feel that learning could happen until a strong sense of community had taken hold, therefore I felt it was important to nurture social relationships. Linda didn't disagree with this, but created a clear distinction as to the evolutionary stages of an online community.

*Linda (interview 1): At some point in time when I know the climate is right I move away from that. I still facilitate it and I am still really aware and I still value it a lot but I find that not everyone has the opportunity to come to a course and learn ...The key for me is to provide them with content and with engagement and activities that will really inform their knowledge and understanding of the content.*

As a researcher participant, I had observed that Linda was skilled at pushing the discussion to deeper levels, a goal that is often identified in the distance education literature as important for student learning. Linda's interactions in the Online Academy had certain characteristics.



1. They usually began with an acknowledgement in the form of encouragement or feedback, followed by a question or comment that pushed the discussion or further challenged students.
2. They concluded with an invitation to respond, directed at the individual or the group in general. Eg. “looking forward to your response” or “comments anyone?”
3. Messages that addressed common elements or were shared postings to the course were signed with her name and my own.

For example, in a discussion about how e-learning should be defined, Linda continually pushed students to go beyond offering their own opinions, and try to create connections between the course content and their own ideas.

**Message no. 863**[Branch from no. 811]

Posted by **Linda** on Monday, March 21, 2005 06:54

**Subject: Re: not only web**

Hi,

I find this thread very interesting; mostly because of the way we are interpreting the technologies and the web.

I personally find that now most technologies run through the web, so to say that the phone and TV are excluded, is not totally true. I've used the web many times to call my brother long distance. The call uses the same technologies that you would use if you were doing it with telephone; the only difference is that I'm using the microphone and speakers of my computer.

Many of the technologies that make TV possible, are also available through the web... I can download some old movies, tv programs, the news, and watch them on my computer.

**Therefore, the question still stands.... what is not e-learning?**

Looking forward to your comments.  
Cheers,  
Linda

Later in the thread, she responds similarly to a specific student:

**Message no. 865**[Branch from no. 825]  
Posted by **Linda** on Monday, March 21, 2005 07:35  
**Subject: Where does FSB fit in the continuum?**  
Hi [OA Student A],  
I think your institution is doing e-learning, there are many things  
that you are doing on the web to support f2f activities.  
**But I need you to start using the content from unit 1, and position  
yourself in one of the continuums, chose a framework, and let me know  
where do you think FSB is right now?**

Looking forward to reading your response.  
Cheers,  
Linda

Within this thread eight out of her ten posts push students to make a connection with the frameworks presented in the content and their own opinion. I see this as evidence as to how Linda' directed her teaching presence in a way that was consistent with her conceptualization of the discussion forum as an activity space with clear goals associated with the activity.

Linda's interactions in the Metropolitan University course took on a different pattern. Her posts were generally shorter and tended to address more "managerial" issues. Her interactions often had the following pattern:

1. The message began with a statement of acknowledgement or encouragement.

2. A statement that attended to a course management detail, such as clarifying questions about assignments or readings, and suggestions for addressing these.
3. Messages that addressed common elements or were shared postings to the course were signed with her name and my own.

There are a few key differences in Linda's interactions in the two courses. It is interesting to note the presence of more metacognitive strategies in her posts in the Metropolitan University course, for example, but it is surprising that the posts in her first language are generally shorter than in the Online Academy. The presence of the more managerial posts in the Metropolitan University course is a result of a different use of the interaction space—a forum for questions and answers or announcements engages the instructor differently than a general class discussion forum. The fact that her posts in the Metropolitan University course didn't invite students to respond is a reflection of the purpose of the question and answer forum. Therefore, to gain a more accurate comparison it is best to look at Linda's interactions in the one class discussion that took place in the Metropolitan University course. In this one-week discussion she posted nine times, and her interactions had the following pattern:

1. acknowledgement and encouragement of a student contribution
2. a response that provided feedback to the student while attempting to further discussion through her own personal example or a question.

The sample taken from the class discussion shows that her interaction style is somewhat consistent with the pattern she adopted in the Online Academy, while highlighting at the same time the role that course design and structure have in shaping instructor presence.

**RE : Interrogante**

Linda / 10/06/2005 17:10:41

-----/

Estimado [MU Student A] ,

La tolerancia, es una actitud que se desarrolla en el dominio afectivo.

Existe una taxonomía de cinco niveles, en el cual uno de ellos es el valor.

Consulta la taxonomía de Krathwohl -Bloom si te interesa aprender acerca de los niveles.

Puedes empezar consultando esta liga

<http://www.santillana.com.ar/02/xtextos/0602.asp?mat=eteorico&sec=1>

Ahora, enfocándonos a nuestro tema de discusión de esta semana, y espero tu me contestes esta pregunta :-)

¿Cómo podemos motivar a nuestros alumnos a desarrollar actitudes, por ejemplo "tolerancia"?

Saludos,

Linda

*RE: Question*

*Dear [MU Student A]*

*Tolerance is an attribute that takes place in the affective domain. There is a 5*

*level taxonomy in which each of them has a value. Take a look at Krathwohl-*

*Bloom's taxonomy if you are interested in learning more about the levels. You can try this link:*

*<http://www.santillana.com.ar/02/xtextos/0602.asp?mat=eteorico&sec=1>*

*Now, lets go deeper into the discussion for this week, and I hope you will try to answer this question☺. How do we motivate our students to engage the attributes—for example "tolerence"?*

*Cheers,*

*Linda*

However in the following example, taken from a question and answer forum, Linda responds to a student's question by providing her own expertise on the subject from the position of a knowledgeable expert, and does not attempt to push the dialogue further for reasons that will be discussed later. This characterized the majority of Linda's interactions in this course.

**RE : definicion**

Linda / 11/06/2005 00:10:34

-----/

Hola [MU Student B]:

Es muy buena pregunta.

Constructo, es una idea o teoría que incluye un conjunto de conceptos o elementos.

Por ejemplo: el constructo personalidad, clima psicosocial, inteligencia.

Espero esto resuelva tu duda, de otra manera no dudes en preguntar.

Saludos,

Linda

*RE: Definition*

*Hello [MU Student B]:*

*That's a good question. Construct is a notion or theory that is related to concepts or elements. For example: personality construct, psychosocial climate, intelligence.*

*I hope that helps. Don't hesitate to ask if it's still not clear.*

*Cheers,*

*Linda*

## Themes

### *Understanding the student context*

In conceptualizing the relationship of the course and the discussion forum, Linda drew on assumptions and knowledge of the contexts to adopt an interaction strategy in the discussions.

*Linda (interview 1): I was very aware of what I thought was the Croatian context and where the students were coming from, therefore I was even more aware of modeling of what facilitation was all about. Because the content of the course [was] for them to learn what good on-line learning and teaching is all about, I was even more contentious of modeling good practices of facilitating, [since they were not used to] constructivist or more collaborative environments.*

Linda's assumptions about the contexts of the students also served to influence the approach she adopted in her teaching. She was particularly sensitive to the language constraints of the students, and what that meant to her role as an online instructor.

*Linda (interview 1): For some reason I have this idea in my mind that neither in Croatian or in Spanish there are that many articles and [in particular] good articles or research [on] education[al] theories and educational technology*

*strategies. People don't have access to that and if they don't know the language then it is harder to access all that information, all that research. So there was a piece of me as a facilitator that was really focused on providing students with the best available content that I could find that would easy to read and give them the tools they needed to understand what was being taught. So the content was very important [in addition to] two other aspects: engaging in good activities and modeling good practices.*

Therefore Linda's teaching presence was shaped by the assumptions she made about the constraints and affordances of the students' contexts.

### ***Identity***

Identity emerged as an important theme in the case of Linda, and it's particularly interesting to contrast how identity played out in the two different sociocultural contexts of the two courses.

Linda described her online teaching as shaped by her own prior educational experiences in Mexico, both as a student and as an instructor. She identified herself as a facilitator, having arrived at this view of online teaching in the course of being exposed to different educational approaches, especially constructivist.

*Linda (interview 1): I come from a very distinct history of transmission or very traditional methods of teaching when I was in Mexico. The moment I got to Canada and even in Mexico I started looking at more constructivist ways of engaging the students with learning and I really bought into those. I really bought into more collaborative and comparative and social aspects of learning. With that and understanding how to implement those and how to make students engage more in their own learning I became much more a facilitator.*

This cultural-historical influence directly influenced how she conceptualized the online teaching context, and her role within the context.

*Linda (interview 1): I really thought that my role was to develop activities that [would] make students actively engage with the content and with the practice and within the context that they had practice it. Therefore my role was only to make sure that the resources and support were available for them to do that. That is the way that I see myself.*

My experience in co-authoring these two courses with Linda confirm her view. Linda took considerable care in designing course activities that were consistent with a constructivist approach, and was careful to scaffold the activities in a way that would ensure that students were supported early on in the course through the modelling of the instructors, and would then move on to group activities that saw them being much more



independent of the instructors, and more reliant on their group members. She was careful to provide support through detailed instructions and expectations for the activities. In the case of the Metropolitan University course, she constantly pushed us to find textbooks and research articles in Spanish, despite the fact that it was often difficult to obtain.

### ***Language and Identity***

At the time of the interview, Linda had been living in Canada for 12 years, and both her professional and personal life, to a lesser degree, was lived in English. I got the sense from Linda that it was refreshing for her to be engaged in a teaching experience that was taking place in her first language. Linda had said that she felt like a different person when she was in a Spanish-speaking environment, and felt that she engaged differently with people. This is hardly a surprising statement to language education researchers, or any bilingual person, who understands that language, identity, cultural expectations and personality are intertwined. However, the interview with Linda revealed just how much she felt that this carried over to her online teaching presence.

To begin with, Linda approached the two teaching experiences differently, based on what appears to be an understanding of shared sociocultural identity. The following statement reveals that Linda positioned herself differently and subsequently engaged differently with the Metropolitan University participants.

*Linda (interview 1): Coming from Mexico and knowing the language I felt this commitment to model and provide the best approach to the Chileans (not that I wasn't doing it in the Online Academy) just because I have some kind patriotic or national or language relationship with those people and I felt that I had a stronger bond with the participants.*

Linda also talked about how teaching in Spanish influenced her teaching presence. Linda often mentioned humour as being something that she could share and express with the South American group, but not so well with the Croatian group.

*Linda (interview 1): ...I think as a facilitator it was easier for me to facilitate the Chileans and the Argentinians because of the language. Even though I believe that I might communicate as well in English and in Spanish there is a piece of culture in jokes and humour that comes out in me when I am in [first] language that doesn't come as easily in English. Therefore it is sometimes easier to facilitate when there is some relationship there at the level, .... I felt my facilitation in Spanish was easier not because my vocabulary is better, but just because my culture and humour comes out easier in that language.*

I mentioned to Linda that having co-taught with her in both Croatian and Chilean experiences, that I observed no difference in the expression of personality that came out in her teaching presence. Linda further explained that she felt there was less filtering in

her expression when teaching in Spanish, since there is a feeling that students would understand what she was saying, even if she was making subtle cultural references.

*Linda (interview 1): I think that there definitely is a part of personality that comes out when I speak in my first language that does not come out in English. It is not that my Spanish is that good anymore but there is something that happens when I talk in my first language that remind me of things that I used to say to my brothers or my sisters, family,--humour that comes alive when I am talking in that language that only people have seen those TV programs or that have been part of the culture understand. Chile and Argentina have a lot of Mexican culture because of the soap operas and everything so even though they might not totally understand it they are related to it. The humour will have ears, it will have someone to understand it even though they might not be totally be related to that or know what I am talking about, they will find the joke, they will understand.*

Although Linda frequently refers to humour as something that gets lost in interacting in a second language, she also highlights the struggle of simply communicating, or choosing not to communicate, as a result of language interference.

*Linda (interview 1): You might see in my messages [a bit] of who I am but my messages are half of what I think. Sometimes in English I come with an idea and I don't have the perfect English word so I step out of it and don't put it in. ... In*

*Spanish I never come up to that, there is always a word that I can find. Sometimes it is not that I don't find the word it is that I don't know how to write it or spell it and that just deters me from writing and that stays out of my posting. So I do believe that my postings in Spanish are much more direct and much more humorous or much more who I am than in English. I think even though my English has come a long ways there is still a piece of me that is not transparent in the second language just because I am not fast enough to translate that into what I am trying to do.*

Linda often mentioned humour in talking about her teaching presence and the linguistic constraints and affordances that she faced in the Online Academy and the Metropolitan University experiences. I understand this to be an aspect of her own identity that is important to her in presenting a teaching presence, and therefore is one that is constantly being negotiated within the activity system. Importantly, linguistic constraints seem to create a tension between Linda's own identity and her teaching presence. She gives several examples of this in her interview, best exemplified in the following statement:

*Linda (interview 1): What people might see in my messages is me but that is the way I am in English--it is not my total me.*

In addition to linguistic constraints, there was a consideration of the audience, and how they might interpret or misinterpret what she was trying to say.

*Linda (interview 1): ... I deterred from saying many things because I didn't know how it would fall in their ears or how that would be interpreted...Because English is not my [first language] and neither is their's your management of the language has to be very specific because you really don't know who you are addressing at the other end of the line...So it has to be much more direct.*

Language interference occurred on two levels in the Online Academy course—the students who were themselves trying to communicate in a second language, and Linda who was trying to understand whether the problems were a result of students being unable to express it accurately in their second language, or Linda's own inability to understand their English, and being able to assess whether they were understanding the content or not.

*Linda (interview 1): In Croatia it was their second language so it was struggling trying to understand [whether] what they were saying was part of their [English] language [difficulties] and [whether] was [a result of] not understanding the content. In [the Metropolitan University context] I didn't have that problem. I knew that the language was not a problem so I knew it was the content so it was much easier also to facilitate.*

My own observations of Linda's teaching presence didn't reveal the extent to which she was struggling with the linguistic constraints, or the sociocultural considerations she was making. I was interested in knowing whether she felt students would be able to observe this struggle. I asked her if she really felt that this struggle affected the development of the community of inquiry in the Online Academy.

*Linda (interview 1): I don't think it changes the mood of the community, I don't think it digresses or effects the community in any way. I think that the facilitation that I do is very honest and transparent even in the second language but I do feel that there is a little piece of me that is missing. People may not realize it. It is the you that everyone knows in that second language but it is another you that I know in my real you which is my first language. So I don't think it effects the way the people perceive me but there is a piece of me that I feel frustrated with when I am trying to make a message and then I feel restricted by the language and not being able to express myself totally and having to post  $\frac{3}{4}$ 's of what I wanted to post or the posting being half as humourous as it could have been if I was able to express myself fully in another language or knew that the context or the people that were going to receive the language would understand the humour.*

### ***Imagined Communities***

In her interview, Linda frequently expressed her affinity with the Chileans and how that influenced her own experience. But since Linda had never actually been to the country before, and since she herself was Mexican, I interpreted some of her understanding of the students and her own affinity with them to be one of an imagined community. Linda felt that she had more knowledge and understanding of the Chilean culture than she did of the Eastern European context.

*Linda (interview 1): ...I understood more of what they experience was all about. So I thought I understood more of their context, that I did understand the Croatian context even though we heard a lot about it and I knew they were used to traditional ways of teaching. In my mind I couldn't imagine all the variables that were involved in that history or in that background as much as I could imagine the variables and everything that was happening in Chile or Argentina.*

Linda also explained that she felt that there were probably many similarities with her own educational experience in Mexico.

*Linda (interview 1): I think I thought my experience [having been educated in Mexico] was closer to the Chileans and Argentinians. ... So I thought I understood more of their context...*

What is especially interesting about Linda's affinity with the Metropolitan University students is that it translated into a deeper level of commitment and investment on her part as an instructor.

*Linda (interview 1): I think I have big commitment especially when I feel much more connected to the Argentinean's and the Chilean's and I want it to be an excellent experience for them. I want them to learn as much as they can...The key for me is to provide them with content and with engagement and activities that will really inform their knowledge and understanding of the content.*

### ***Technology as a constraint***

The Metropolitan University experience used a different CMS than we had been accustomed to in our other online teaching experiences and our own professional arena as course developers. It became clear early on that this CMS had a poorly designed discussion/interaction space, presenting a linear format the spanned several pages that needed to be clicked to be followed, making it difficult to follow threads of conversation over an extended period of time, and especially difficult if there was a lot of discussion activity. My own reflections showed that this tool impeded my teaching presence to some degree, and I asked Linda whether she felt that it had for her.



*Linda (interview 1): I think it affected me as an instructor in building the community because I really didn't like the system. Therefore I tried to avoid being there as much as I could so my communication with students was mainly used through the Announcements or through some of the postings and posting one general message to everyone. But [I found myself] not reading everything and I would easily find myself flustered in that environment or feel that I was losing a lot of time trying to read or find what I was looking for and not finding it. Or [even] re-reading things that I had already read. The system didn't work. Having said that, the students don't know anything else, we do. For them that is the only thing that they know, and as anybody they get used to the system that they know. I don't think that the community missed anything [since] I don't think they knew anything [than that system and therefore could] create strategies to work around that system. We know something different and we know that there are better systems out there that do much more for one. We feel flustered and we don't even want to create those strategies to move around it because we feel it is a waste of our time. I think it suffered in my interactions with them but not in their interactions with themselves. Having said that you find other strategies to address their communication without having to go places where you find you are spending your time in not a positive way or not an effective way.*

The strategies that Linda and I adopted to overcome the constraints of the technology included resorting to posting in an Announcements forum that only allowed an instructor to create postings, therefore creating a one-to-many interaction space. The nature of this type of communication creates a different instructor presence, one where the instructor is less engaged in dialogue, but still able to communicate generally to the class. Additionally, unlike Linda's interactions in the Online Academy where she often pushed the discussion to deeper levels by asking further questions of students, in the Metropolitan University course we both avoided doing this, since we were unable to participate in and maintain a dialogue efficiently using the CMS.

The implications of a system that forces instructors into a situation where they don't read all of the students' forum postings, or are interacting in more of a teacher-centred way are potentially significant. What is interesting is that Linda highlighted the role that instructor agency takes in adopting other strategies for interaction. In this case twelve of forty-eight of Linda's messages were posted in the Announcements forum in an attempt to alleviate this technical constraint.

### ***How presence is affected by co-teaching context—a constraint and an affordance***

Both the Online Academy and the Metropolitan University experiences were contexts where both Linda and myself were co-authors and co-teaching. In the Metropolitan University experience I authored my sections in English, and due to deadlines, Linda was caught in the position of having to translate it for Metropolitan

University. I was sensitive that this added considerably to her workload, without any compensation.

Once the Metropolitan University teaching experience began, I found myself faced with a difficult task of being able to read and respond to student postings quickly. While I found it relatively easy to keep up with the reading, I realized it was taking me three times as long to compose responses in Spanish. As a result, I was slow to get off to a good start, and my teaching presence was minimal in the first two weeks. Linda, in contrast was active from the beginning. In the first week she had posted twenty-one times, while I had only managed to post three times.

I had learned in my interviews with other instructors that the division of labour in co-teaching was occasionally a source of tension, and I was curious to see whether Linda perceived a tension in the Metropolitan University context. Of course, as a colleague, I wasn't sure how willing she would be to share this with me in an interview situation, but Linda acknowledged that while the translating created more work for her, she didn't feel a tension related to the division of labour between us.

*Linda (interview 1): ...not in the facilitation or in the marking or anything else, I never felt that it was unfair or unbalanced. I felt that if I was doing it, it was because I felt that I had to do it at this point in time. Other points in time it would come other ways and we would help each other in other ways so I never felt it was unfair or unbalanced.*

Nonetheless, Linda equated the constraint of the co-teaching situation as being similar to a language constraint, in that the need to consult with the other co-teacher on a continual basis never allowed her to fully adopt a teaching presence that was congruent with her identity.

*Linda (interview 1): I do believe that when I am co-teaching I am aware of my role as a facilitator but I am also aware of my role as a co-teacher. Therefore it is like working in a second language; I am not 100% who I am, I am like 90% because I can't be all me because I am co-teaching with someone and we are trying to present one framework and not two frameworks. I don't want to create tension between the teachers, I want to create a good environment for the students [and because] I am really aware of who I am co-teaching with my comments might not be as strong or as assertive as I would if it was my own course. I want to make sure that I touch base with my co-teacher. Most of the time I do think that I am very keen on consulting and not providing my own views especially with key elements of a course.*

### ***Tension created by student non-participation***

In both of the courses, there were cases of student non-participation in discussion forum activities. In the Online Academy, there was so much student non-participation in Linda's group that it caused us to both devote considerable time seeking answers and

finding solutions. As this was the first time that Linda had experienced this level of non-participation in an online teaching situation, she devoted a lot of time thinking about it and reflecting on it. The constructivist design of the course was dependent on active participation of the students, and this made Linda particularly uncomfortable.

*Linda (interview 1): I think non-participation for me was very difficult...If you think about constructivism and you know that constructivism is social and you know that your students are not interacting you get worried...I totally believe that they were missing something by not interacting with each other. The problem was with the way that the course was set up, I didn't know if they were reading other stuff because participation wasn't the main source of information about their understanding content. Therefore I had to wait until the assignments and that wait was painful.*

Linda addressed non-participation in a number of ways. She first used the discussion forum as a way to find out from students what was going on, and then sent private emails to non-participants to offer her assistance and to try and understand what the issues were. Her discussion forum posts are revealing in how they express both bewilderment and discomfort with the fact that the discussions were less effective with the absence of these students.

Linda's first message addressing the non-participation assumes that students might be confused about what to do next, and she redirects them to the current discussion topic.

**Message no. 1031**[Branch from no. 988]  
Posted by **Linda** on Saturday, April 2, 2005 03:48  
**Subject: I'm back and it is time to move on...**

Hi,

Where is everyone?

It is time to leave the frameworks behind, and talk about the assumptions that inform our reasons to implement e-learning in our institutions.

Looking forward to reading your comments.

Cheers,

Linda

Her second appeal posted within minutes of her first assumes that students might not be participating because they feel overwhelmed after the first three weeks of the course. She reemphasizes the expectations and attempts to move them on to the next discussion.

**Message no. 1032**  
*Posted by **Linda** on Saturday, April 2, 2005 03:57*  
**Subject: End of discussion**  
*Hi everyone,*

*It's been a very interesting first discussion, and I hope it has challenged you, but not overwhelmed you.*

*For those of you who joined us a bit late, I'm sure the number of posts you had to read was a bit too much...for those of you who might be reading, but are hesitant to post, please jump in! Every person who participates productively enhances the community, and we all benefit from what you have to say.*

*You are welcome to come back to read anything under this discussion topic (we will leave it open) but please don't post anymore in this topic--the discussions aren't ongoing--once the discussion is closed, we want you to focus your energy on the next discussion. Continuing to post in a closed discussion is like talking to an empty room :-)*

*All of the contributions have been excellent, and I think we are off to a great start!*

*See you in elearning assumptions!*

*Best,  
Linda*

A few days later she responds to a student who has finally posted and expresses her relief.

**Message no. 1055**[Branch from no. 1048]

Posted by **Linda** on Monday, April 4, 2005 05:48

**Subject: Re: why am i here... assumptions for sending someone to the Online Academy :)**

Hi [OA Student A],

Thanks for joining me and breaking the ice, I'm so happy to see you here, I was afraid I had lost everyone between my vacation and the new topic discussion.

I would not be too worried about using all six assumptions to move the project forward, actually that gives you some leverage and opportunity to focus on one or two depending on the audience you are addressing at a particular point in time.

Cheers,  
Linda

Two days later, she expresses her concern, and posts a more personal reaction to the lack of participation.

**Message no. 1076**

Posted by **Linda** on Wednesday, April 6, 2005 18:32

**Subject: Getting worried**

Hi,

I was wondering where is everyone?

I went on vacation for a few days, and came back to a ghost town ;-)

I miss you guys, miss your comments, your thoughts, your ideas, and enthusiasm.

Hope you all come back soon, we have so many good things to talk about.

Best,

Linda

Four days later Linda expresses her bewilderment, and since she is aware from the CMS stats that students have been logging in and reading the posts, she clarifies the expectations and rationale for the discussions.

**Message no. 1122**[Branch from no. 1076]

Posted by **Linda** on Sunday, April 10, 2005 06:25

**Subject: Mystified**

Hi everyone,

Hope you are all doing well.

I'm totally mystified by the lack of participation on the forum, one day the discussions are going great, and then nothing.

I know you are reading the postings....

The questions for this discussion forum are an important part of your Module 1 assignment, working on them in the forums would really help you move forward on this task.

Can anyone tell me what is going on? I'm open to any comments and suggestions.

Cheers,

Linda

During this time, Linda and I spent considerable time trying to understand why my group was participating so actively while her group appeared to be lost. We let the Croatian



Online Academy program coordinators know about the problem, and sought their assistance in trying to understand what could be happening. We noticed that some of the non participants had been posting in the Student Café (a non-evaluated discussion area), but since the posts in this section of the forum were all in Croatian, we asked the Croatian project coordinators to let us know if there were any clues in the discussion going on there. When the non-participation problem continued for the next four weeks we decided that since student learning was being compromised by the lack of discussion in Linda's group, it would be a good idea to have two Croatian tutors-in-training facilitate the discussions for both mine and Linda's groups for the remainder of the course. In this way, if language was the reason for the non-participation, this solution would allow students to engage in the discussions in Croatian.

*Linda (interview 1): ...[I wondered] what did I do, was I too strong? Was the climate not good? Could I have done something better? I spent a lot of time trying to fix that, being a little bit more active or trying to fix things... Definitely it was creating a big tension between my [developmental] teaching perspective [as well as] knowing that learning is done better with collaboration and discussing with others. That made me feel very uncomfortable. ...When the Croatian [tutors] took over and they reassured me that it was the group and even in their own language because one of the assumption was that it was the language. It was not the language it was something else.*

What is interesting to observe across the two experiences is how this tension creates a different reaction in the Metropolitan University experience, representing a shift in how the instructor perceives the tension and adjusts to it within the activity system. For example, I point out that the Metropolitan University context also had cases of non-participation, but we didn't expend much energy worrying about it. Linda attributed this to instructor experience but also to the design approach.

*Linda (interview 1): I think that there was non-participation but [with] the way the activities were set up [there] were more group activities and not individual participation or discussions. Therefore you know it was the responsibility of the groups to find their group members discussing or not. Not everything was relying on the instructor to make people participate and that was much easier. When people were not participating the group really followed up on that and they took the role of the facilitator to make sure that the other team members were part of it. Also I think that every experience that you have teaches you something and what you learn is that not all groups are the same and not all people respond in the same way and not all people see learning the way you see it and react the way you want to react. You learn to relax and let things take their own flow instead of trying to control what is happening.*

My understanding of the non-participation issue is limited to the formative evaluations that students completed during the course, and interviews with students who

had participated in the pilot version of the course in which we had also experienced some degree of non-participation. Only one of the student evaluations suggested that he was disappointed at the level of engagement of the fellow students. He scored Linda's facilitation as 'good' and comments:

*OA Student C: Module 2 gave insight into pedagogical elements in planning and realization of learning process. Considering current state Croatia's higher education, these are significant elements which could help improve education, and of course, implementation of E-learning. Although learning activities were at good level, I must admit - it's [a] pity that participants haven't taken more initiative in building more constructive and contextualized discussions.*

In our interviews with students in the pilot version of the course, we were intrigued that the instructors, the Croatian program administrators, and the students themselves offered different reasons as to why students might choose to not participate in the online discussions, despite the fact that there was a significant part of the grade attached to this activity. Table 10 summarizes the different perspectives regarding non-participation in the pilot study:

Table 10. Pilot Study: Factors of Non-Participation as Perceived by Different Stakeholders

Instructors' interpretation of high degree of non-participation	Online Academy interpretation of high degree of non-participation	Participants' explanation of high degree of non-participation
1. English skills	1. workload (lack of time)	1. Lack of time
2. Inability to adjust to a dramatically new environment	2. new environment (move from teacher-centred to more learner-centred learning context)	2. Needed a personal push early on in the course
3. Motivation		3. If got behind, forum was overwhelming, and question of how to participate became unclear

When analysing the student evaluations for Linda's group, it is revealing how some of the least active students evaluated the quality of the discussion and the facilitation of the tutor (see Appendix D for the evaluation form used). With the exception of one student, the students in Linda's group (who completed the evaluation form) evaluated these two components as either excellent, good, or adequate. One of the least active students gave the highest marks to these two components. Two of the students also suggest that the workload associated with the course might have also been a factor, which is consistent with the pilot study that we conducted to better understand this issue. Only one student specifically complained about the non-activity of the group.

I understand this positive feedback of the discussions and the instructor to mean that the boundary between active and non-active participation is interpreted differently by

the instructors and students in this context. While as instructors we felt that student activity in Linda's group was inadequate, it is possible that for this group of students it was adequate, relative to their own educational experiences. It is also interesting to note that when Online Academy tutors took over the discussion in Module 3, there was some leveling of the differences in the two groups, suggesting that perhaps language of instruction was a factor to some extent. Nonetheless, the Online Academy tutors also commented on the lack of activity in Linda's group, which suggests that language was not the only factor, despite the fact that in a communication with one of the Online Academy tutors we learned that for some students it made a big difference switching to Croatian.

Message no. 1950  
Author: Croatian Tutor A  
Date: Sunday, June 12, 2005 23:28  
Discussion 7 summary

So, here we are at the end of the 1st attempt of the 1<sup>st</sup> [Online Academy] tutor generation and let's summarise what was going on and how ... :-)

First of all it seems switching to Croatian was a good choice. A few students admitted english was not their first choice and their contribution is much easier using Croatian.

I'm sure you can clearly rate ones participation according to number of the posts submitted (or should we do that ... or should it be done via WebCT) so I'd like to stay on the content here...

Tannis' group was better in discussions, being active and putting more attention on relevant topics and facts. It was easy to work with them. Almost all participants were active with [Student 7] as a main actuator, [Student 7] was also good in argumenting against Kozma...

Lindas' group was a little bit slow at the beginning. After starting discussion we had fair contribution also, but with fewer participant present....

Table 11 provides additional comparative evidence of the difference in participation between my group and Linda's.

Table 11. Comparison of Linda's Group Activity to Tannis' Group

Module and Discussion #	Linda's group	Tannis' group
M1, Discussion 1	82	58
M1, Discussion 2	62	99
M1, Discussion 3 (optional)	5	13
M2, Discussion 1	62	100
M2, Discussion 2	57	102
M2, Discussion 3	26	67
*M3, Discussion 1	80	104
*M3, Discussion 2	86	83
M3, Discussion 3 (optional)	0	0

\*taught in Croatian by the Online Academy facilitators

When participation in the pilot (Generation 1) version of the course that Linda and I both co-taught is compared with this second (Generation 2) cohort analysis reveals that in actual fact there was not a lot of difference in the average number of student posts

in both times that we taught the course. Nonetheless, my Generation 2 group was twice as active as the pilot group and Linda's Generation 2 group.

Table 12. Comparison of Average Number of Student Posts to the Discussion Forum

Average number of student posts to the discussion forum	*Pilot (n= 23 )	Gen 2 (n=24)	Gen 2 Linda (n=12)	Gen 2 Tannis (n=12)
	32	47	32	61

\*in the pilot version, Linda and I did not have separate groups

The tension created by non-participation stimulated us to take an action that we felt would alleviate the tension, in an effort to attain the outcomes we envisioned for the activity system. However, consistent with Beaudoin (2002) and Tatar (2005), it highlights how different members of the activity system can have different understandings of what constitutes active participation.

## Discussion

This case provided important evidence to suggest that identity is an important component in the negotiation of teaching presence. In particular, the notion of imagined

community is helpful in understanding how Linda directed her teaching presence in relation to her own sociocultural identity. In Linda's case, the development of the online community of inquiry was not necessarily affected by her different levels of engagement in the community, but the extent to which Linda felt that she had a teaching presence that was congruent with her own identity affected her own sense of belonging and engagement with the community. If all online teaching involves to some degree an imagined community, then Linda's perceived shared sociocultural understanding of the Metropolitan University context had a direct influence on her teaching presence and her perception of the experience. In other words, Linda directed her teaching presence towards this imagined community and her shared sociocultural understandings of it. In contrast, she felt that her lack of sociocultural understanding of the Online Academy context created a teaching presence that was more mechanical and less personal in her view. However, due to the different construction of the interaction spaces in the two courses, it is not observable in her discussion postings that her teaching presence differed in the two courses as a result of her sense of affinity with the imagined community. Therefore, this important theme is observable only on the level description of her own experience, highlighting the importance of adopting multiple methods to further our understanding of teaching presence.

This case also provides evidence of the considerable role that the tool, in this case the CMS used in the online teaching context, has in constraining teaching presence. Despite Linda's strong student-centred, constructivist orientation to teaching, she was



forced to adopt more teacher-centred communication to overcome the constraint of the CMS being used in the Metropolitan University context.

Finally, in this case a tension in the activity system (non-participation) transformed Linda's teaching presence in the course, resulting in her eventual replacement by the Online Academy tutors, illustrating how moment-to-moment events influence instructors' interactive decisions and teaching presence.

## Daniel

### **Background to the case**

Daniel was in his late thirties and employed as an educational technology coordinator at a large Canadian university. He was considered an authority on emerging technologies and worked with faculty and groups across campus in assisting and engaging the campus community in thinking about the educational possibilities of these technologies. In his role as an Educational Technology Coordinator at the university, Daniel regularly prepared and gave workshops to the campus community, and frequently presented at local and international conferences. Daniel also had two years experience as a language teacher, but teaching online was new to him. This was his second time teaching the course, and his second online teaching experience.

### **Case data**

- Two interviews with the instructor
- One interview with the co-instructor
- Instructor discussion forum postings
- Instructor weblog postings
- Course documents

## **Course design**

Daniel was assigned as a co-instructor to the course “Text and Technology” in an online Masters degree in Education. The program was situated at a large Canadian university, but attracted students locally and globally and prided itself on its international audience. The course was taught in English, and generally enrolled students who were teachers, administrators, or technology specialists. Course content covered the theoretical notions of literacy, and specifically, text in relation to the technologies of the digital world. The course was one semester long, comprised of thirteen weeks. WebCT was the primary course environment, but there was also a course weblog that was integrated as a way for students to contribute resources and to present some of the ideas being discussed outside of the password protected course boundaries.

Discussions formed 25% of the course grade, and these took place in the WebCT discussion forum space. Four topic spaces were shared between both of the instructors, while five topics were set up that separated instructors and their respective students into two groups. There were also four topics set up to provide a question and answer space related to an activity involving a series of technologies. Therefore, the type of topic forum elicited different interaction from the students and instructors depending on its purpose.

### **Perspective on the problem**

Daniel was selected because he was co-teaching with an instructor who had considerably more experience with online teaching. Additionally, Daniel had co-taught with the same instructor once before. While his expertise made him well qualified to teach the course, he did not actually have a formal degree in Education, unlike most of the instructors teaching in the program. Daniel was also selected because the instructor with whom he was co-teaching was the same co-instructor (Phillip) for one of the other cases in this study (Case John).

### **Characteristics of instructor interactions**

The CMS data shows that Daniel posted in 10 of the 13 weeks of the course. The majority (54) of his messages were replies to student postings. Content analysis of these postings show that 28 of 63 messages contained statements that acknowledged student contribution, while in 15 messages Daniel provided an element of his own expertise or a statement that pointed the student towards additional resources.

Table 13. Instructor Interactions in Text and Technology

	Daniel	Phillip
Total replies	54	86
Total initiated	11	9
Total messages	63	95

The CMS data shows that the co-instructor (Phillip) posted more frequently, but also posted reply messages the majority of the time. In considering Daniel's interactions, it is important to consider that the discussion forum was separated into a variety of topics, in which some were shared and accessible across both of the instructors and their assigned students, while some topics were private to the instructor and his section. The course interaction spaces were very carefully thought out, and designed with the understanding that two instructors were co-teaching in the space, and therefore could take advantage of this situation differently, in consideration of the constraints and affordances it presented to the students. Unlike some online courses that create separate discussion spaces for the instructors to be able to interact separately, this course adopted a design that allowed the instructors and students to sometimes be sharing the same interaction space and sometimes be separate.

*Daniel (interview 1): We kind of managed [the interaction spaces] depending on what interaction we were going at. So for certain discussion forums we would have two different groups because we felt it was more important that each student be able to have a relatively distinct kind of identity and that you knew that every student was going to have a significant amount to say in the discussion forum. We worried about 50 students just swamping the forum. But for other forums where, say optional discussion topics or more tangential things or something that was a little bit more eclectic or off to the side, where we were so sure how much energy there would be in those particular forums, we would pool them.*

It is also necessary to include the weblog as an interaction space. Daniel made a total of 5/5 postings to the course weblog. Daniel also maintained a widely read and respected professional weblog (outside of the course) to which some of his course weblog postings were cross-posted. Daniel's teaching presence was situated in the WebCT space as well as the weblog spaces.

The course design alleviated some need for instructor presence in the designation of two students to take on the role of responding to technical problems, in exchange for release time on a course assignment. Daniel appreciated this approach, as it is often a cumbersome task for instructors, but one that seems to continually present itself in online teaching and learning contexts.

## Themes

### *Positioning in relation to the co-instructor*

The interviews and discussion transcripts suggest that Daniel positioned himself as an apprentice to the co-instructor, who had considerably more online teaching experience and seven years of experience designing online courses.

*Daniel (interview 1): Both years I taught the course I was teaching with a far more experienced instructor so I certainly deferred to him on a lot of stuff and I was very grateful for his presence. So in many ways I was teaching a course that I probably would have been a little bit out of my depth if I was to have done it on my own. There is this kind of hybrid between an instructor, professor and a TA [Teaching Assistant]. I felt like it allowed me to cover up some of my weaknesses and play to my strengths.*

He was also aware of the position ascribed to him by the CMS, which allowed only one person to be designated as an instructor, and labels additional instructors as Teaching Assistants.

*Daniel (interview 1): ...I find that I like the term instructor, [but] I think that within the course management systems itself I am classified as a TA just because the way it is set up. There can only be one full on instructor.*

Daniel showed careful reflection about his own positioning, which seemed to be directly related to the identity that he brought to the teaching experience. He arrived at his own label of ‘instructor’ in terms of the functions that he didn’t bring to the course.

*Daniel (interview 1): My chosen term is instructor and I guess it is the grandest that I can lay claim to. I couldn’t call myself a professor. I didn’t design the course either. It was a course that was pre-designed by a professor and an instructional designer before I came near it. Although the way I ended being a teacher was I was kind of tangentially brought into the design process for adding some elements to actually broaden the online interaction spaces. I proposed a few alternate models that were incorporated fairly successfully into the course. That was why when there was an opportunity to fill in that I was plugged into it.*

In both interviews, Daniel repeatedly complemented the experience and the knowledge of the co-instructor, and never viewed it as a constraint to his role. Daniel valued how Phillip provided him with an opportunity to share ideas and seek advice. In both interviews, Daniel expressed how important Phillip’s presence had been, and confirmed that he positioned himself in relation to this instructor as someone who could learn from



his mentoring and practice. Throughout the course of this teaching experience, Daniel would frequently seek his advice, reassurance, and modelled some of his own practices, such as feedback on assignments, after the co-instructors. Importantly, Daniel was grateful that Phillip respected and supported his own position as course instructor, despite his own misgivings as to whether he really was qualified to be there.

*Daniel (interview 1): As I had mentioned, the other instructor was more experienced than me, so I must admit I would often defer to him or I would often ask 'What do you think?' ...If I saw a situation then I didn't hesitate to ask him for help. To a lesser extent he did with me too. I was very grateful for that because I was able to be reasonably frank about things that I felt that I wasn't doing very well. I either got fairly honest reassurance or some really good advice.*

### ***Positioning in relation to the students***

Daniel also showed an awareness of how he positioned himself in relation to the students, and the tension he experienced in addressing his teaching presence towards this group of students, whom he viewed as having more professional experience, in addition to being older than himself.

*Daniel (interview 1): Especially that first time I taught the course. I was looking at the students, when I just look at their accomplishments. I was younger than all but two or three of them. They were all working, many of them in very impressive positions. So it was really hard for me to feel, it was different than say when I taught high school in [Latin America] where I felt fairly comfortable. They expected you to crack the whip on them a little bit and the teacher/student dynamics were easy to conceptualize even if I always didn't feel comfortable being an authority figure there either. But at least the roles were understood and clear.*

There was also evidence of deliberate discursive positioning in his interactions with students. Daniel's discussion forum messages show that at times he adopted a more informal register in his interactions with students. Daniel explained that he resisted being positioned and viewed as an authority. Daniel suggested that this approach was both a deliberate strategy as well as a reflection of lack of confidence.

*Tannis (interview 1): So when you talked about going in and almost being perceived as a student, was that a deliberate strategy on your part to sort of reduce the authority in a way or did you think that that was going to create a better community?*

*Daniel: I think it speaks to my strengths and weaknesses as an instructor. I think that when it works well, when I am doing it well that you can still be authoritative in the sense of knowing your stuff and being knowledgeable without being too authoritative in the sense of being a manager or a dictator. But sometimes that deference or somewhat diffident approach to online discussions, sometimes it reflects a lack of confidence.*

Daniel was grateful that the course structure adopted a constructivist approach placing student expertise as equally important of that of the instructor. In this sense, he viewed the design of the course as an affordance, since it didn't require him to be placed in the role of an authority, which would have created a tension with his own identity and positioning.

*Daniel (interview 1): When you are in one of these online environments, especially like I said when you are dealing with very accomplished students and the course is set up in a way to foster a lot of discussion. The instructional design philosophy of the course was certainly very influenced by constructivist ideas. There weren't a lot of right and wrong kind of definite places we wanted people to go. There were right and wrong issues in terms of the way that set up their web pages but in terms of what content they put on there, they had a very wide berth.*

Daniel described the online interaction spaces as feeling like an online classroom, which is surprising since the course itself adopted relatively unconventional spaces for students and instructors to engage with, such as wikis and blogs, in addition to a series of discussion topics in a discussion forum. I had expected Daniel to suggest that this contributed to a more expanded view of an online community. Daniel elaborated on his reasons for this feeling of online classroom, highlighting that he felt pushed to take on a certain type (more traditional?) of teaching presence at the requests of his students.

*Tannis (interview 1): Why would you use online classroom as opposed to, for example, a place for activities? Some (of the people I interviewed) called it a community in the making. Why online classroom - is there something sort of didactic about it?*

*Daniel: Yes, I think because there were roles that were understood and especially early in the year there were expectations. What I found too is that if I didn't act enough like an [authoritarian] instructor at times there were students who needed me to do that. I would see a discussion going and people would write me off line saying can you get in on this. They wanted someone to come in and lay the groundwork for it, that is was spinning out too much.*

In activity theory terms, the negotiation of Daniel's teaching presence was a result of a tension taking place between the community, rules, and division of labour of the activity

system. The expectations of the community influenced Daniel's teaching presence to some extent, despite a constructivist approach to the design which set a competing expectation of teaching presence.

Daniel also provided another example of how his conceptualization of his role conflicted with the expectations of the students.

*Daniel (interview 1): Probably my least favourite type of interaction came up around assignments where students would ask 'how much is this worth?' or 'am I allowed to write about this topic or that topic?'. Especially since I found that usually all I ended up doing was--because of the questions were framed in a way that was a little bit obscure--was just go read the publicly available assignment information and it was usually stated in almost every case unequivocally. So sometimes my least favourite interaction was essentially reading the documentation for students.*

The position that Daniel preferred to adopt was one as a peer engaging in the class discussions. However, this approach had an unanticipated effect on the students' interactions.

*Daniel (interview 1): ... if the discussion was really flying along I would participate almost as a peer. Just really throwing my two cents. Actually I had to be very careful about this especially early in the classes because I started to feel*

*like a real discussion killer. I would see this rolling, rollicking discussion with arguments and stuff flying back and forth and I would take a position as if I was a member of the student cohort and it would often stop discussion dead in its tracks, especially early on.*

*Tannis: Why do you think that happened? Why do you think students were thinking?*

*Daniel: They were perceiving me as an authority who was coming in and to disagree with me would be to risk their grade.*

In fact, in one of his discussion forum postings Daniel explicitly provides a rationale for his hands off approach in the discussion.

**Message no. 720**[Branch from no. 645]  
Posted by **Daniel** on Friday, October 7, 2005 11:12am  
**Subject: Re: Ong's correlations**  
So many great threads -- I'm almost afraid of poking in and disrupting the great flow you all have going...

The concern for creating an authoritative yet non-authoritarian presence was something that Daniel continually struggled with.

*Daniel (interview 1): ... especially early on in the course, I think in both instances by the end of the year there had been enough trust built up that I could kind of*

*pitch in my two cents. I tried all sorts of things, I tried to really say that this is just my opinion but you can say those things but it takes a fairly brave student to take their teacher on.*

The following examples are evidence of the strategies that Daniel had adopted to make it clear that he was stating an opinion.

**Message no. 421**[Branch from no. 360]

Posted by **Daniel** on Sunday, September 25, 2005 10:40am

**Subject: Re: The "Authority" of "Text"**

Speaking for myself, I find that how candid I am on my blog has fairly tight concordance with how candid I would be in the physical world. In other words, if I would not say it in a meeting, or at a conference, then I shouldn't say it in my blog.

He also adopts syntactical structures that are less direct, as evidenced in the following two postings.

**Message no. 1164**[Branch from no. 1130]

Posted by **Daniel** on Tuesday, November 8, 2005 8:40pm

**Subject: Re: Internet...the new encyclopedia?**

"Because of the way the internet is organized (links that take you to more pages on the same topic which have more links) there is no longer that hierarchy of knowledge..."

Does GoogleRank count as hierarchy?

I wonder too, if encyclopedia is what the Internet is beginning to resemble -- for one, encyclopedias represent a unified voice, the web is anything but.

My quibbles aside, your points make plenty of sense...

**Message no. 1165**[Branch from no. 1137]

Posted by **Daniel** on Tuesday, November 8, 2005 8:49pm

**Subject: Re: Internet...the new encyclopedia?**

...

Interesting point -- though again your logical conclusion makes me wonder about the validity of Bolter's premise. Do people really automatically believe what's on the Internet any more than, say, television? And aren't most people aware of the vast disparities in credibility of web sources? (I know we all have stories of students uncritically repeating a website, but bear with me.) If I state a specious fact, and you ask the source, my reply "the Internet" is not likely to prove very satisfying. It's a bit like saying "from earth", or "from a person", or "from somewhere".

To me, whether or not people should believe what they read, see, or encounter in print, TV, or the web is a critical thinking issue -- and hard to associate with any media. But your concerns are legitimate... Can we think of any characteristics of the web itself that cause unique problems? (The ease of copying comes to mind, or the speed with which information can be transmitted, which add up to the "echo chamber effect".)

It was also noticeable that Daniel adopted a range of registers in his online communication, ranging from relatively informal to more formal. The following two examples demonstrate the two extreme ends of this range.

**Message no. 1281**[Branch from no. 1215]

Posted by **Daniel** on Monday, November 14, 2005 11:51am

**Subject: Re: Potter's ETEC540 De.licio.us**

"I am running Flock on Ubuntu 5.10 (a Debian Linux variation) and it has been working quite well - especially with my Wordpress blog and De.licio.us account."

DUDE! You are sooooo much groovier than me.

I may come back to you with questions about Ubuntu -- I grow more weary of Apple by the day, but can never go back to the Evil Empire.



**Message no. 223** [Reply of: [no. 101](#)]

**Author:** Daniel

**Date:** Friday, September 16, 2005 10:04pm

Ann, that's an interesting point. It can get very easy to get into intractable arguments about the relative merits of print-oriented or electronic culture and the effects of them on our minds -- but maybe either side can seem superior depending on which elements of consciousness are deemed most important.

However, it is important to mention that the course design had a key influence on this, since the interaction spaces themselves demanded a different type of presence and positioning of the instructor. Therefore, I see this as evidence for the high level of awareness and sensitivity that Daniel had in his communication. For example, the first message example (1281) was part of a discussion forum that engaged students in a highly student-centred exploratory activity, and did not constitute a formal discussion space. In contrast the second example was posted in a formal discussion activity that was quite structured and guided by specific expectations.

### ***Transfer of practices***

Daniel's described the type of teaching presence he preferred to adopt as resembling his professional practices of weblogging. Daniel's weblog is a widely read resource for many educational technology professionals, and engages a considerable group of experts in discussions around a variety of topics. As a result of his weblog,

Daniel has a distinguishable online identity that straddles his academic and professional life. I observed that this practice carried over to his online teaching practice.

*Daniel (interview 1): ... the role that was probably easiest to fill and the one that I had the most fun was not unlike how I work when I use my weblog, just finding interesting, relevant kind of thing and then throwing them into the pot to get people talking. That was stuff that I do on my weblog all the time and had a lot of fun doing that in the forums and that was the probably the most satisfying good discussions.*

The discussion forum postings show that Daniel frequently contributed postings that threw in his own expertise or pushed the discussion in conjunction with providing resources. Of 63 messages posted, 25 of them were coded as such. The following is typical of a post where he provides his own personal example while referencing resources for further exploration.

**Message no. 227**[Branch from no. 217]

Posted by **Daniel** on Friday, September 16, 2005 10:47pm

**Subject: Re: Technology of codex**

There's no question that the reliable lifespan of most digital storage media (especially portable ones, like CDs) is very short. And the problem of digital preservation also wrestles with the problems involved with the constant changes in programming languages, file formats, hardware, etc...

I could just barely retrieve the paper I wrote in grad school (a decade ago, gasp) currently stored on an obsolete laptop with a 3.5 inch disc drive, loaded with Word Perfect -- at least I think I could -- but

it would be a tiresome, multi-stage process. If I want to save this (and other digital) stuff, I'd better do it now... the gaps grow wider all the time.

Here's one of my favorite factoids -- an ironic twist for a project dedicated to digital preservation and memory:

"Consider the fate of the British Broadcasting Corp.'s computer-based collection of photographs, writings and other snapshots of life in 1986, the 900th anniversary of the written English survey, the Domesday Book.

"While scholars can still read the 1086 tome, the digital version needs customized software and hardware that are breaking down from old age, meaning records from just 17 years ago are rapidly vanishing."

Source: <http://www.chron.com/cs/CDA/story.hts/tech/1739675>

And libraries are increasing pulping paper copies in favor of unstable digital storage, in the names of cost savings:

<http://j-walk.com/nbaker/doublefold.htm>

Unlike some of the other cases, Daniel's teaching presence seemed to be more influenced by his social networking practices that he engaged with professionally than with his past experience as a classroom instructor. This highlights how the practices that instructors bring to the online teaching context are informed by these identities. However, Daniel also discussed the constraints of communicating in an online context in contrast to the affordances of the face-to-face context.

*Daniel (interview 1): Especially again I think this may have been one of those instances where online interaction made it a little harder than if these were people who had met me in person. I certainly know as an in class facilitator I am pretty good at creating context where people free to challenge me fairly quickly.*

*Just by things like nodding or smiling when someone first takes a poke at you and that kind of signals to the group. I know that there are ways of doing that online, but I think it is a strategy and there are a lot of skills involved in that and I was certainly learning.*

*Then I feel like I am not being a very good teaching, when I feel like I am seeing those things and responding effectively to them, those are the things that students seem to appreciate the most and when I feel like I am doing my job well. In some respects that is harder online.*

My own analysis of Daniel's discussion forum interactions show that he didn't actually kill conversation, and in fact the conversations continued despite his interactions. In the second interview with Daniel I mentioned that his postings followed a pattern of acknowledgement and encouragement to the student, followed by giving a resource or a question to the student. He found it interesting that this was his pattern, and once again made the connection with his weblog practice and the construction of the posts he makes there. In this second interview Daniel emphasized again how weblog discourse was much more comfortable and meaningful to him than discussion forum interaction, and attributed this comfort to the fact that his own weblog practices have connected him with a distributed network of highly knowledgeable individuals, with whom he can engage with quickly and easily if their expertise is needed.

Daniel also understood his interactions to follow this pattern as being consistent with his view that the instructor shouldn't appear as an authority or dominate the discussion. He viewed it as a way of participating meaningfully, while respecting the expertise of the students and avoiding the instructor-student hierarchy. From an activity theory perspective, Daniel's instructor presence was influenced by his understandings of the object in relation to the community and rules, as well as his own identity and positioning within the activity system. However, as we have seen, his understandings of the object generated tension between the expectations of the community and the object, in that students at times required his presence to take a different shape. In the second interview, Daniel also confirmed that the teaching evaluations revealed that some students would have liked it if he had been more present earlier on in the course. Daniel emphasized again that he had clear reasons for approaching the course as he did, and suggested that it is a challenge to find the perfect balance.

### ***Teaching presence and knowledge of content/area of expertise***

I was also interested in how teaching presence might be shaped by an instructor's own comfort level with the content. Daniel had mentioned in his first interview that one of the constraints of the online context was the inability to gauge student understanding, interest and engagement, and adjust his own interactions accordingly. He expressed that in a face-to-face context (where he is often giving workshops in his area of expertise) he

felt he had a greater ability to ‘read’ the participants and their needs, and felt comfortable enough with the content to be able to change directions as needed.

In Daniel’s case, he was originally positioned as a student to audit the course he was teaching, and because of his expertise in one of the topics of the course, he was then brought on to teach it. By the time the second interview was conducted, Daniel was in the process of teaching the course for the third time, and I asked him whether he felt that he was becoming more knowledgeable in the content area, and whether that was having an influence on his teaching presence. Daniel suggested that to some degree it was, and obviously the more he taught the course the more comfortable he was becoming with the content. However, he highlighted that the amount of presence needed was decreasing as the strength of the group and the level of academic and technological literacy they brought to the course seemed to be increasing each year. In keeping with his belief that the instructor should take a less dominant role and give students the opportunity to share their own expertise, this meant that the stronger the group, the less the need for teaching presence.

*Daniel (interview 2): Another really important thing that I benefited from was the student cohorts in both classes were very strong. So more often than not if someone had a question in the forum, depending how often I was checking the forum, at least one other student had taken a crack at helping.*

### ***Constraint in not “knowing” students and effect on teaching presence***

As with Case Joanne, Daniel experienced tension in not knowing how to address students as unique individuals and in being able to get a clear picture and understanding as to who they were. He related this to his own ideas about good teaching, and mentions several strategies that he adopted to overcome this constraint.

*Daniel (interview 1): The one thing that I have certainly have found is those first two to three weeks I have a hell of a time getting a sense of the distinct voices of the individual students, the voices and the perspectives and the unique takes. They tend to blur together in those online environments especially those first couple of weeks where everyone is throwing stuff out.*

*Strangely enough I always find the first major set of essays, grading and returning them and I try to give fairly substantive feedback on the essays. Getting the feedback on the feedback in some cases is usually the big ice breaker. Far more than the two to three weeks of ice breaking activities. I think the students relax a lot more when they have gotten a solid grade from an instructor and they kind of know where they stand and what they can expect to be picked on and what they can expect to be praised for. Also too, this may speak to my own failures as a*

*reader but I am still a far more attentive reader when I am reading something on paper than when I read it online. I read a lot online, I am quite positive that ingest more text digitally than on paper.*

Daniel also talked about how he struggled to get a sense of the students' individual voices and found himself adopting several strategies to overcome this constraint, such as printing out their discussion postings to better be able to focus on their individual voices, and also felt that he was able to get to know them better through their assignments.

*Daniel (interview 1): I think that there are kind of certain cores; I guess almost values that I think are pretty close to universal. I think it is really important to whatever extent possible to try to see your students as human beings as opposed to figures. That is a grand statement and it is not always easy to do, I don't claim I do it all the time. I feel like that when I am not making a real effort to see what is distinct about each student and the way they are approaching the issues and problems and the special challenges that they are facing, what they are good at and what they are not good at. Then I feel like I am not being a very good teacher. When I feel like I am seeing those things and responding effectively to them, those are the things that students seem to appreciate the most and when I feel like I am doing my job well.*



This interview segment suggests that his own beliefs about the object of the activity inspired him to gain a better understanding of who his students were.

## **Discussion**

This case provides considerable evidence that positioning and identity are important mediators in the negotiation of teaching presence. Daniel positioned himself in relation to the co-instructor and the course design, but found this positioning challenged by the students. In activity theory terms this constituted a tertiary contradiction between the object and rules components of the activity system. Daniel was able to draw on his own identity as weblogger to provide an identity option within the discursive spaces of the course to reconcile this tension between the expectations of the students and his own understandings of the rules and division of labour of the system. He viewed weblogging discourse as a legitimate practice that served to inform the teaching presence that he established in this course.

In this case teaching presence was also shaped by the design of the discussion forum, as demonstrated by how Daniel adopted different registers. Teaching presence research has largely overlooked the heterogeneous nature of course interaction spaces and ignored how course design shapes interaction.

Like Joanne, Daniel did not feel the online context afforded him a way of knowing his students as individuals, which he felt was essential in performing his identity of a “good teacher”. The strategies that Daniel adopted to overcome this—printing out

their postings, getting to know them through their assignments, and googling their names—all demonstrate the level of agency that he had in addressing this tension, and both Joanne and Daniel felt that this constraint influenced their teaching presence.

Tannis

## **Background**

At the time of these two course experiences, I was employed by a large Canadian university as an instructional designer for a distance education unit. This position provided me with the opportunity to participate in several international collaborations, which is how I became involved in the Online Academy and the Metropolitan University. At the time of these courses, I already had face-to-face and online teaching experience. The Online Academy course was my third online teaching experience, while the Metropolitan University course was my fourth. I was teaching these two courses consecutively, with the final week of the Online Academy overlapping the first week of the Metropolitan University course.

## **Case data**

- Instructor discussion forum transcripts (Online Academy and Metropolitan University)

- Interview with course coordinator (Online Academy and Metropolitan University)
- Formal interview with co-instructors (Online Academy and Metropolitan University)
- Informal conversations with co-instructors (Online Academy and Metropolitan University)
- Student evaluations (Online Academy)
- CMS data
- Course documents

### **Course design**

The course design for the Online Academy course “Elearning tutoring” has already been described in Case Joanne. The course design for the Metropolitan University course has already been described in Case Linda.

### **Perspective on the problem**

The inclusion of myself as a case was an effort to gain a reflective perspective on my own experiences as an online instructor. While the other cases build from the interviews to gain an understanding of the negotiation of teaching presence, I am able to use my own reflections about my actions and postings to get at the ‘why’s’ of my own

instructor interactions. I also use the interviews conducted with my co-instructors (Case Linda and Case Joanne) as a way of reflecting on my own experience.

The Online Academy that I co-taught with Joanne was selected because it was the third time I was teaching in the Online Academy, but in contrast to the other two times, it was the first Online Academy course for which I had not been involved as a course author. Additionally, unlike Joanne, I was teaching to students that I had already taught in the Foundations course. Therefore, this constituted the only case where an instructor had this degree of familiarity and knowledge about the students they were teaching.

In the Metropolitan University course I was co-teaching in my third language, and because of my association with my workplace and with my co-instructor (who were both highly respected by Metropolitan University), I found myself in a role where I was perceived to be knowledgeable and qualified by the institution. The institution also did not contest whether I had the appropriate level of Spanish required to teach online.

## Characteristics of instructor interactions

Table 14. Instructor Interactions in E-Learning Tutoring

Total initiated	30
Total replies	41
Total messages	71

Table 15. Instructor Interactions in Teaching and Learning Theories

Tannis total messages in foros (forums)	14
Tannis total messages in anuncios (Announcements)	4
Total messages	18

Although the average number of messages I posted for both courses appears to be similar (4.5/week for the Online Academy vs. 4.4/week for the Metropolitan University), the CMS data shows I interacted at different rates between the two courses. In the Online Academy course, I maintained a consistent level of interaction across all of the discussions. My interactions in the Metropolitan University course were much more sporadic. As discussed in Case Linda, in the Metropolitan University course the majority

of our teaching presence took place in the forums designated for Questions and Answers. There was also one forum set up in Week 1 for a class discussion. The following figure presents a snapshot of the frequency and number of my postings across the four weeks.

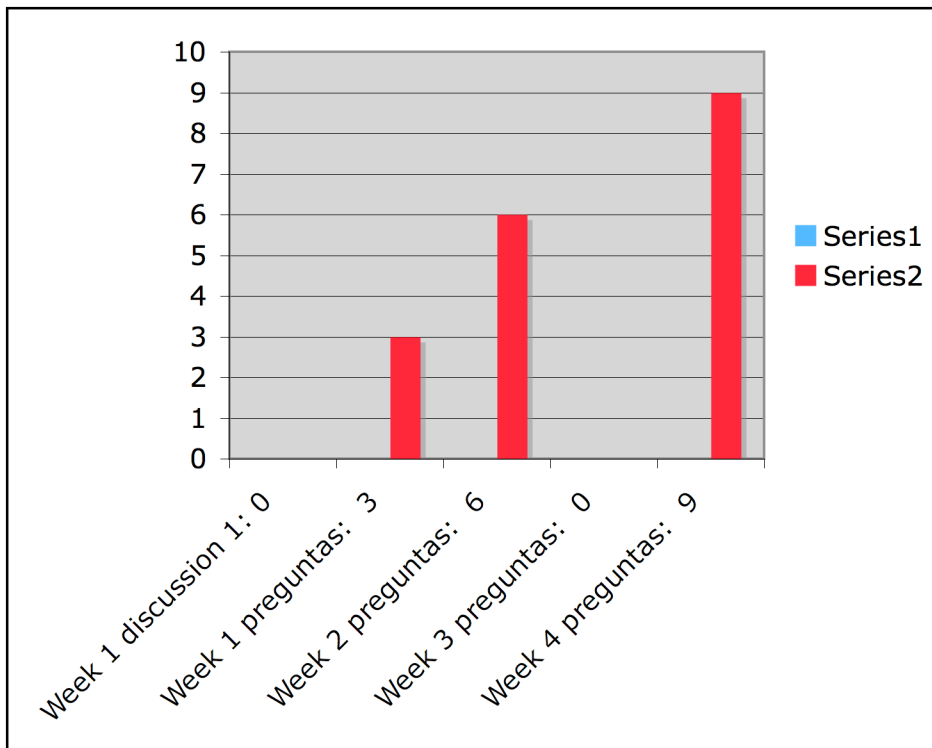


Figure 7. *Number of Tannis' postings by day in Teaching and Learning Theories*

The sporadic nature of my interactions in the Metropolitan University (Teaching and Learning theories) course is largely a result of my relative language deficiencies, which will be discussed below.

I entered both of these courses with a conceptualization of the discussion forum as a place for the development of community. My own view was that the establishment of a community required frequent instructor and student participation. I believed that for students to be active in the discussions I had to create a climate of trust and reduce the student-instructor hierarchy. Furthermore, I saw my role as one that should ensure that student contributions were acknowledged, and that when appropriate I should push the discussion to a higher level.

I also assumed that students were engaging with the postings in the same way I was, and would be reading all of the posts regardless of who they were addressed to. In this way, I was addressing the online interaction as a class to which students had an ear in all of the conversations. This is evident in the following message, where I am responding to one student but asking for verification of another at the same time.

**Message no. 193**[Branch from no. 190] Posted by **Tannis Morgan (tmorgan)** on Thursday, January 19, 2006 17:54  
Subject: Re: de Bono's thinking hats reference  
Hi [ET Student A],

You've said it well. I think it could be useful in forcing a discussion beyond simple sharing of opinions, because by taking on a different perspective, you aren't really sharing opinions, but making a case.

The technique that [ET Student B] mentioned in an earlier post (advantages, disadvantages, important points to consider--am I correct [ET Student B]) is also a way of accomplishing a higher level discussion that goes beyond sharing opinion, since participants have to have something to say about all of the perspectives.

Tannis

As I will demonstrate, adopting this view of teaching presence would influence how often I posted, the types of postings I made (in the Online Academy course) and the dissatisfaction I felt about my own teaching presence (Metropolitan University). In the Metropolitan University context, the linguistic constraints I faced in addition to a course design and technical constraints would ultimately change my teaching presence. Therefore this case will demonstrate how an instructor's conceptualization of the interaction spaces can influence their teaching.

## **Themes**

### ***Course design and teaching presence***

The level of interaction required in these courses were largely influenced by the course design. Having taught two generations of the Foundations certificate with another co-instructor where we were very conscious of the importance of student and instructor participation, I felt a tension early on between accepting a structure that required less instructor facilitation. This was further complicated by the fact that at the start of the course Joanne was very busy and had overseas engagements that resulted in her entering the interaction space a few weeks after the start date. We had initially arranged to alternate discussion topics facilitation, but while I welcomed the idea of having breaks, I found it difficult to not be following the conversations and engaging myself continuously



in the course. As a result, I continued to read and post in all of the discussions. However, in one of my messages I express my discomfort with the spacing of discussions, and attempt to highlight that this is not a result of lack of instructor presence, but one that has been predicated by the course design and the interruption due to the holiday.

Message no. 141

Posted by **Tannis Morgan (tmorgan)** on Wednesday, January 11, 2006 19:39

Subject: This week's discussion

Hi everyone,

It feels like it's been a while since we've had an active discussion, with the holiday, and the types of other activities that we've had you do in this module.

We're looking forward to hearing your 'voices' again with this week's discussion...

Cheers,

Tannis

The students in this course had all been participants in the first or second generation of the Foundations certificate that I taught with Linda. Throughout these first two runs of the certificate we paid particular attention to how students perceived and valued discussion forum interaction in relation to their own learning. Based on feedback that we received from interviews with students and focus groups, we concluded that while students felt that some clarifications were needed around the discussion activities, they felt they benefited their learning. However, students also suggested that the amount of time needed for readings and discussion activities was well above the eight hour guideline.

In keeping with this feedback, the course authors decided to make discussion forum activities less intensive, and less frequent. With this in mind, the student

perspectives on the facilitation and discussions in this course are especially interesting when compared with the perspectives they provided in the first certificate.

Formative student evaluations for this course (see Appendix D for form used) show that students experienced confusion with the inconsistency in the pace of the discussions. Some discussions were lively and intense, followed by period where no discussion was required.

*Anonymous Student, Module 4: It would be supportive that although discussion is not meant for some weeks that instructor comment on activity during that week.*

*Anonymous Student, Module 5: I had feeling of slight disorientation as discussion wasn't primary teaching technique in this module. Nevertheless final discussion in module raised many interesting points and views non-characteristic for known education...*

*Anonymous Student, Module 5: The guidance/support from the mentors have subsided (according to the planned curriculum) and as a concept it certainly influenced my motivation and activity. It is much harder to keep working.*

What is especially interesting about the student feedback in these comments is that although they acknowledge that the design of the course didn't always require discussion, they felt than the presence of the instructors was an important factor in

keeping them on track and motivated. This evidence suggests that more consistent interaction was needed or expected. When asked to rate the statement “The instructors effectively facilitated my learning in the module” (Appendix D) this dissatisfaction is most evident in the first module, where instructor presence and discussion forum activity was most inconsistent. The following table compares this feedback across the three modules.

Table 16. Student Feedback On Instructor Facilitation Across Online Academy (Tutoring Certificate) Course Modules

Module	Average (/5)
Module 4	3.5 (N=11)
Module 5	3.8 (N=10)
Module 6	3.75 (N=4)

I was even more disoriented by the course design of the Metropolitan University course, which only had one class discussion in the first week, followed by three weeks of student group discussion where instructors were not required to be present. Instructor communication was then confined to the question and answer, the announcements, and the feedback on assignments. Since I didn’t actually begin posting until the second week, the requirement of my instructor presence as key to the development of community didn’t have a place. The pattern of posting that I adopted in the Online Academy course—

acknowledging student contributions, offering my own experience and expertise, and pushing the discussion further with additional questions—had no room in the Metropolitan University course design that positioned me as a facilitator who could answer questions and provide clarification as needed. Therefore, I was forced to reconcile my view of interaction spaces as community building spaces, and adopt a conceptualization that positioned me as a resource.

What is interesting is that the Metropolitan University students expressed no dissatisfaction with the level of interaction by the instructors, either by me or Linda. The interview with the Metropolitan University program director revealed that what students valued was the quick feedback that we did provide, and that the speed at which we were able to respond motivated discussion. Therefore, students weren't motivated by the quantity of instructor presence, but by the timeliness of our interactions.

### ***Sociocultural considerations***

Sociocultural considerations were at the forefront of my interactive decisions in the Online Academy course. I was particularly sensitive to the fact that we were teaching in English to an entirely Croatian-speaking cohort and whether this factor would enhance or constrain participation. Since I had already met the students and had taught them in the Foundations course, I was now aware that there was a range of English language ability in the group, and I found myself drawing on my ESL teaching experience to address areas that I thought might be more challenging. Through my involvement in the ELA

project I was also aware that certain educational terms had no equivalent in their language and would need additional clarification.

**Message no. 65**

Posted by **Tannis Morgan (tmorgan)** on Sunday, November 20, 2005 07:40

**Subject: feedback on assignment 1 drafts**

Hi everyone,

Those of you who submitted a draft to me should have received feedback in your WebCT email. In reading your drafts, I realized that I need to clarify one thing--it also came up in our orientation, but I want to repeat it here:

A program and a course mean different things to Joanne and I. We view a program as a series of courses, usually over a period of time that leads to a certificate, diploma, degree, etc.

A course is usually a single entity or event, and usually takes place over a shorter period of time than a program--1 month, 3 months, etc.

A module, a lesson, or a class, are an event that occurs within a course, like you experience here in the Online Academy.

Hope that helps.

Tannis

In the Online Academy course, a strong awareness of the sociocultural context of the students lead me to focus on providing students with metacognitive strategies as a way to help them navigate the linguistic challenges and the ambiguity of the environment. I did this in three postings in the first week, and again after a two week Christmas break. In the following message I am reiterating the requirements of the activity and providing suggestions for how they might approach it.

Message no. 8

Posted by Tannis Morgan (tmorgan) on Thursday, November 3, 2005 18:47

Subject: collaborative partners

Hi everyone,

Just a reminder that one of the things you should be thinking about is finding a collaborative partner that you will be working with as early as next week. Since you had the opportunity to meet face-to-face last week, you might even consider contacting somebody that you were working with in your small groups. With 9 people, obviously we will have one set of 3, which is fine as well.

You might want to use the WebCT email to contact the person you want to work with. Your collaboration doesn't need to happen by internet--you can use the phone, meet in a cafe, whatever works for you. But you will want to make sure that you will have their contact info, and establish when you will be available for each other.

Tannis

Sociocultural awareness came through clarifications of expectations, which were grounded in what I had been told throughout the project by the Online Academy students and the Online Academy development team members.

Message no. 6

Posted by **Tannis Morgan (tmorgan)** on Thursday, November 3, 2005 04:05

Subject: Anderson and Caplan

Hi everyone,

The discussion for this Unit begins today, and will go for the next 10 days. Joanne is away these next 2 weeks, so I'll be facilitating this discussion. However, you will recall from the orientation that I encourage all of you to 'facilitate', in the sense that all of us can take on the responsibility of pushing the discussion to higher levels. ...

In this excerpt I was drawing on what I had been told about the (teacher-centred) prior learning experiences of the students and am setting expectation that in this course that everybody should take responsibility for creating a good discussion. I was also reiterating instructions that they had already received verbally (in English) at the

orientation, conscious that for some the verbal message might have only been partially understood.

Having a certain amount of sociocultural awareness in the Online Academy course was key to establishing a teaching presence that I felt was appropriate for the context. In contrast, I had almost no awareness of the Metropolitan University context, both in terms of the prior learning experiences of the students, the educational system, or even the type of students that the program attracted. I found myself drawing on my teaching experiences in Mexico to establish some sort of understanding as to what the South American educational context might be like. However, I was also aware that there might be no relationship between the two, and the lack of knowledge about the students and the Metropolitan University context made it difficult to be strategic about my teaching presence.

### ***Language of instruction and teaching presence***

Unsurprisingly, teaching in my third language posed a constraint that had a profound effect on my teaching presence. Not being able to communicate easily caused me to question my ability to provide the necessary teaching presence that the students required. Therefore, I questioned my own legitimacy as an instructor, and attempted to find ways of getting around my language deficiencies. This included the use of online dictionaries, and frequently using French/Spanish translation since I felt that the proximity of the two languages would be more accurate. I drafted my posts into a Word

document, and then used the built in grammar/spelling to correct the Spanish. For questions about assignments, I often just copied and pasted from the course information. Occasionally I would get Linda to proofread my messages before posting, but refrained from doing this too often out of consideration for her own workload.

Since it took me three times as long to compose a posting, all of my interactions were short (2-3 sentence) messages, and I compensated by providing students with links to resources where they could find answers to their questions. For example, in week three I tried to respond to a question about the difference between trivial constructivism and cognitive constructivism, and noted how limited my response is in comparison to what I would have written had it been in English. Once again, I supplemented this post with links to external resources, in the hopes that this would provide the student with greater clarification.

**Pregunta**

[MU Student A] / 29/06/2005 18:17:02

-----/

Hola Linda

En el artículo: "La enseñanza de la ciencia y el mito del constructivismo".

¿Cuál es significado de "cibernética de segundo orden".

Desde ya muchas gracias.

[MU Student A]

*Question*

*Hi Linda*

*In the article "The Science of Teaching and the Myth of Constructivism" what is the meaning of "cybernetics of second order"?*

*As always, many thanks*

*[MU Student A]*



**RE : Pregunta**

Morgan, Tannis / 29/06/2005 18:59:14

-----/  
Hola [MU Student A],

Buena pregunta. De verdad, es la primera vez que veo esta palabra en el contexto de constructivismo, pero encuentre esta página (en inglés) que explica bien el concepto <http://www.pangaro.com/published/cyber-macmillan.html>

Parece que es una mezcla del concepto de Artificial Intelligence y constructivismo...

Tannis

*RE: Question*

*Hi [MU Student A],*

*Good question. Actually, that is the first time I've seen this term in the context of constructivism, but I found this page (in English) that explains the concept well*  
[\*http://www.pangaro.com/published/cyber-macmillan.html\*](http://www.pangaro.com/published/cyber-macmillan.html).

*It appears to be a mix of the concept of Artificial Intelligence and constructivism...*

*Tannis*

I was very interested in knowing how the students felt about the experience of having an instructor who had difficulty responding to their questions. Although I was unable to access the students for interviewing, Linda traveled to South America and conducted an interview with the program director (who had close contact with all of the students in the program). I was surprised to learn that there had been no complaints or comments about my inability to communicate in Spanish and she felt that I was more concerned about it than necessary. I was also interested to learn that 80% of the instructors in the program are foreign, but all of them except for myself are native Spanish speakers.

However, in comparing the interactions of myself and the co-instructor, it is difficult to ignore that Linda's presence (58 messages to my 18) likely compensated for my lack of presence. Additionally, the course design put the majority of the responsibility for interaction in the hands of the students, allowing the instructors to take on a role as a question and answer resource, and a feedback mechanism for assignments. This design approach was greatly appreciated by the students, and the program director noted that it was so successful that it was subsequently adopted in all of the course designs across the program, at the students' request.

### ***Positioning and identity and teaching presence***

In the Online Academy context I was aware that the Canadian instructors were being positioned by the program as "experts". Yet I was uncomfortable with the fact that most of the students were professors at their own institutions, or were highly placed in government and NGO positions. I questioned who the experts actually were, and found this difficult to negotiate. As a result I adopted a teaching presence that minimized my role as an expert, and tried to interact in a way that would position me at the level of a student, while still providing the necessary facilitation needed to direct the course as expected. The discussion forum postings show that I adopted a pattern of interaction that 1) acknowledged student contribution; 2) offered examples of my own experience or perspective; and 3) posed additional questions. Analysis of the transcripts showed that I introduced my own experiences and perspectives through various discursive strategies.

For example, I used “I think” 25 times in my postings, “for example” 6 times, and “my own (opinion/perspective)” 6 times. As previously discussed, in the Online Academy context I conceptualized the interaction space as a community that had to be built, and could only be built with considerable teaching presence. But I also felt a greater responsibility to push the discussion beyond the initial question, as a way of providing more challenges to the students. As a result, transcript analysis shows that probing students further through the use of questions is a strategy that I used. In fact, I asked 42 questions across a total of 71 posts. The following message is an example of the probing strategy that I adopted:

**Message no. 162**[Branch from no. 156]

Posted by **Tannis Morgan (tmorgan)** on Monday, January 16, 2006 04:31

**Subject: Re: passive peers**

Hi [OA Student B],

You've reminded me of an important point...even though we know that online discussions usually don't attain 'deep' levels of critical thinking, research continually show that students report higher levels of learning. So, does this mean that even low level discussion leads to learning? If so, why is that?

Tannis

In contrast, this attention to discursive positioning was not possible in the Metropolitan University experience, where I was preoccupied with simply being able to communicate effectively, and thus fulfill my assigned position as a knowledgeable instructor.

In the Online Academy course, I found myself also adopting additional strategies to avoid taking on tasks typically expected of more teacher-centred approaches, a positioning I resisted. In the Foundations course, students criticized the fact that the

instructors weren't summarizing the discussions each week. Since I felt that this approach was inconsistent with the course design and the program goals, I was careful to provide a rationale for not taking on this task, and put the responsibility on the student to pull the threads together themselves.

**Message no. 204**

Posted by **Tannis Morgan (tmorgan)** on Friday, January 20, 2006 17:01

**Subject: pulling all the threads...**

Hi everyone,

I've certainly enjoyed the discussion we've had, and I think all of the contributions have been excellent. We started with talking about peer teams, and then evolved into a discussion about autonomy, as well as another collaborative teaching approach called de Bono's thinking hats.

Instead of summarizing the discussion for you, I thought it would be useful to have you start to pull these threads together and have you tell us how you see them connecting.

In other words, what is the relationship between peer teams and autonomy? What does the de Bono hat technique have to do with peer teams and autonomy? How is this of relevance to you in your context and/or to the development of your second assignment?

Tannis

***Role of co-instructor and teaching presence***

In the Metropolitan University context the role of the co-instructor was critical in ensuring that students were getting an appropriate level of interaction with their instructors. As the forum numbers show, Linda carried an unequal proportion of the division of labour. However, her interviews show that this did not create a tension for her, since she felt that the division of labour was balanced by increased involvement on my

part in the grading of the assignments. In contrast, in the Online Academy course I experienced tension in not knowing how much ownership to take of the discussion forum. At the same time I questioned whether I was shutting Joanne out and not giving her an opportunity to create a space for her own presence. We were able to resolve this by negotiating a division of labour where Joanne was responsible for grading assignments.

### ***Role of technology***

The role of technology as a constraint that influenced teaching presence has already been discussed in case Linda. When compounded with my linguistic deficiencies, the time required to work with the technology required me to adopt different strategies to interact in the discussion forum. The CMS made it difficult to view messages that had been read but not responded to. Therefore, I was required to respond immediately upon reading the messages, which made the task all the more arduous and difficult, since it allowed me little time for reflection and composition. On at least one occasion, this resulted in me misunderstanding the question, and posting a response that made little sense.

In the Metropolitan University context, technology also had a role in positioning—the CMS designated me as a Principal tutor, in contrast to Linda, who was assigned the title of Auxiliary tutor. Therefore, students often addressed their questions to

me, only to have them responded to almost exclusively by Linda, who was able to respond more quickly in Spanish.

## **Discussion**

In the Metropolitan University context, my conceptualization of the outcome of the discussion forums—to create a community—was the source of negotiation of my teaching presence. I felt that to create a community that would result in student learning, it required consistent involvement of the instructor. Since I was unable to do this in my third language, I felt considerable tension between the object, rules, and division of labour governing this activity. I was also unable to recognize that my conceptualization of the course as a space for developing community was incompatible with the course design.

Through the perspective of the course coordinator and the feedback she received from the students, I have a different understanding of online teaching. Online teaching requires being able to shift an instructor's own objects and outcomes when they are unachievable due to constraints. The activity system framework can be very useful in understanding where the tensions are and how they can be redirected. My rigid understanding of the object and the outcome created an unnecessary tension.

In the Online Academy experience I believed I was more successful in achieving the outcome of a community of learners, since the language of instruction and course design made this possible to some extent. However student feedback shows that since the

course design allowed for inconsistent levels of interaction across the course it had the effect of de-motivating students at times, who required more sustained interaction. This case highlights the role of course design and language of instruction in conjunction with an instructor's own conceptualization of the interaction spaces as mediators of teaching presence. It also suggests (as in Case William) that the timeliness of instructor interaction is more important than frequency of presence.

## CHAPTER FIVE: CROSS CASE ANALYSIS AND DISCUSSION

### **Introduction**

This section presents a cross-case analysis of the cases, and discusses the findings in relation to the research.

Cross case analysis involved the aggregation of themes across the cases, which were then compared and contrasted. In concordance with Miles and Huberman (1994) and Stake (2006), I used a combination of concept mapping and matrices to look at these themes across the cases and to find relationships across themes. In keeping with Stake (2006) and with the sampling rationale outlined in the methodology, I was interested in not only looking at how cases were similar, but also in how they differed across themes. The following discussion compares and contrasts each of the cases and provides a discussion of how instructors ultimately negotiated their presence within the activity system.

### **Student and Instructor posts across all courses**

Table 17 summarizes student and instructor posting activity across all of the courses. It is presented here to facilitate the cross case analysis discussion that follows.



Table 17. Comparison of Instructor and Student Posts Across all Courses

Course and number of weeks	Total number of student s	Total number of instructor and student message s	Average number of student messages posted per student	Total number of instructor 1 messages (%)	Total number of instructor 2 messages (%)	Total instructor messages combined (%)	Total number of student messages (%)
Narrative as Inquiry	13	1080	64	247 (23)	NR	247(23)	833(77)
4 weeks							
E-learning Design	18	487	20	38 (8)(John)	88(18)(Phillip)	126(26)	361(74)
15 weeks							
E-learning Tutoring	13	328	18	22(7) (Joanne)	71 (22) (Tannis)	93(29)	235 (71)
15 weeks							
Foundations Gen 2	28	1409*	41	120 (8) (Linda)*	151(11) (Tannis)*	271(19)*	1128 (81)
15 weeks							
Teaching and Learning Theories	24	418	14	58 (14)(Linda)	18(4) (Tannis)	76(18)	342 (82)
4 weeks							
Text Technologies	33	1660	50	63 (4) (Daniel)	95 (6) (Phillip)	158(10)	1502 (90)
13 weeks							

\*Croatian tutor contributions not included in totals

## **Online classroom or community?**

In an activity theory perspective, the conceptualization of the interaction space is directly related to how the instructor views the object and outcomes of the activity. One of the more important findings of the study is that online discussion forums are not homogenous interaction spaces. In the cases where courses were authored and designed by the instructor(s) teaching them (William, Linda, Tannis, John, Joanne) it would be expected that there would be little need for negotiation of teaching presence, since course design establishes to a large degree expectations for the community (in AT terms, rules and division of labour) and speaks to the instructor's own conceptualization of the interaction spaces. However, as will be discussed, this was not the case, highlighting the complexity of teaching in online contexts.

Conceptualization refers to how an instructor viewed the purpose and goals of the interaction spaces (discussion forums). In some cases this involved drawing on frames of reference invoked through prior experiences. This study demonstrated that there is considerable variation in how an instructor perceives the interaction spaces within a course and even when two interaction spaces (such as a discussion forum topic) share the same functions and objectives, there can be variation between the two instructors. For example, a discussion space for class discussion of a content-related question, a typical online course activity, engendered a very different instructor presence depending on how the instructor conceptualized this space. For myself, class discussion question activities were an aid to developing a community of inquiry, therefore I tolerated and contributed

to a high level of social dialogue without concerns of whether “deeper” learning was occurring. In contrast, Linda conceived of the discussion forum as an activity space, and while social dialogue was important at the beginning of the course, her presence shifted towards a role of pushing thinking and interactions to deeper, more cognitively challenging levels, and always kept this goal at the forefront of her interactions. Therefore, even though Linda and I occupied the same interaction space as co-instructors, we were engaged in different practices to some extent.

This is even more evident in the case of William who conceptualized his entire course as an online graduate seminar, and therefore attempted to simulate the type of dialogue that he would have had if it were a f2f context. As a result, William was a prolific contributor to the discussions. Daniel, on the other hand, shared William’s belief that it was important to not be perceived as an authority and attempted to reduce the instructor-student hierarchy, so as not to kill student discussion. Additionally, both Daniel and William adopted an instructor presence that was congruent with the course design and both courses were driven by a constructivist approach to learning. But while the graduate seminar design required considerable facilitation to make it meaningful to each individual student, the design approach to the course Daniel was teaching relied on strong student-student interaction, and less on instructor-student interaction. In both cases, students had the highest average posts per week, suggesting that both instructors were successful in creating an environment that was conducive to student participation, as evidenced in Table 17.

## **Identity, positioning, and teaching presence**

In the context of this study, I was particularly interested in how the identities that instructors bring to the teaching experience shape or influence their teaching presence. Analysis of identity and positioning is problematic in that while they are concepts that have been widely explored in psychology, anthropology and education, they are difficult to operationalize. I found myself drawing on the multiple definitions and descriptions that I provided in Chapter 2 in an effort to contextualize it in relation to activity theory.

The suggestion that online teaching involves an evolution of “teaching persona” (Coppola, Hiltz, & Rotter, 2002) from face-to-face contexts is useful, but limited in that it is once again referring to instructor roles and behaviours. However, the idea of ‘evolving’ across teaching experiences can be related to Lave and Wenger’s (1991) view of communities of practice as identity producing processes. The case of Linda is a good example of this process in action over time and across contexts. Linda commented on the evolution of her own teaching presence and teaching identity across the two contexts that constituted her case, with regards to how she perceived and reacted to non-participation of students.

In the interest of understanding how the identities that instructors brought to the experience influenced their teaching presence, I found Duff and Uchida’s (1997) description of English instructors in Japan to be useful: “teachers’ perceptions of their sociocultural identities were found to be deeply rooted in their personal histories, based

on past educational, professional, and (cross-) cultural experiences” (p.460). All of the cases exhibited identities by adopting positions that had some connection with their prior experience or personal history—Daniel authored a space as an ‘engaged participant’; Joanne engaged with the course in a role of course author; John invoked his f2f teaching and adopted a position as a class leader; Linda presented herself as an expert guide; William—as a knowledgeable professor; and Tannis—as a community builder. However, the performance of these identities and teaching presence were closely tied to how instructors positioned themselves or were positioned in the activity system. Daniel, for example, never felt like he legitimately could occupy a role normally occupied by somebody with a PhD and with significant academic expertise in the area. As a result, Daniel negotiated this positioning in different ways—by adhering to the course structure and by taking more of a back seat approach to the discussions, and by adopting a deferential position to the co-instructor.

Joanne was positioned as an instructor, but her own investment seemed to be more in her position as a course author, and her participation in the course served this identity more than that of instructor. John, on the other hand, was comfortable with being positioned as an instructor but derailed when he felt that he was being positioned by the co-instructor into a lesser role. This created a tension with his well-developed identity as a face-to-face instructor and former professor.

Finally, William’s positioning as a professor and subject expert was compatible with his own identity and did not generate any tensions. However, he was aware that this positioning would generate expectations of a certain type (more authoritarian) of

instructor presence, and through modeling and consistent effort to reduce the professor/'sage on the stage'-student hierarchy was able to reconcile this positioning. As Singh and Richards (2006) have noted, "whether teachers have the agency to remake themselves through repositioning within the course room will determine if they engage with or resist the activities and discourses of a course" (p. 156). Therefore, instructors' identities were a function of their own prior history, prior knowledge, and values, thus influencing the position they adopted in the online context.

Identity was not exclusively a starting point for positioning. In two of the cases, it was the technology itself that positioned the instructors in a way that generated tensions. In Daniel's case he observed that the CMS itself positioned him as a teaching assistant and not as a primary instructor. In the case of the Metropolitan University course, my interactions were always labeled as primary tutor, whereas those of the co-instructor, Linda, were labeled as auxiliary tutor. This actually created a tension between how I perceived the activity system and how I was being constructed by the tool. As a primary tutor who valued the importance of instructor interaction, I felt uncomfortable when I was unable to participate as frequently as Linda due to the linguistic constraints that I was experiencing. Like Daniel, I questioned my own legitimacy in being positioned in this way, and constantly worried that the students would question it. Donato (2004) (in the context of classroom collaboration) explains "persons develop through and around the cultural forms by which they are identified and identify themselves, in the context of their affiliations and disaffiliations with those associated with those forms and practices" (p. 296). In these cases the CMS served to create identifications and affiliations that

generated tension with our own identifications that we brought to the teaching experience.

### **Technology and teaching presence**

Within an activity system framework, technology is generally a tool or resource that serves to mediate the activity system. As I have already discussed, technology also served to position instructors. Additionally, in at least two of the cases the technology being used in the course was also seen as a constraint that influenced the instructors' teaching presence. Linda and I changed the way we interacted with the students and the location within the CMS for that interaction as a result of what we considered a poorly designed discussion space that impeded our ability to navigate and respond to student posts. As a result, our instructor presence took on a more teacher-centric quality by preventing us from responding to individual students and forcing us to post general messages to the class as a whole.

One of the more interesting examples was the case of Daniel, who brought his weblog interaction practices to the discussion forum, partly as a result of the dissatisfaction he felt with discussion forum interaction and how the discussion forum tool constructed the interaction. This was an attempt to engage with the students in the same way he would have engaged with the larger weblog community, but he exited the experience still feeling like the discussion forum was deficient as a tool for interaction about course topics.

## **Community influences on teaching presence**

In the cases presented, the community was composed of the students and, with the exception of Case William, the co-instructors that shared the course environments. Both students and co-instructors influenced teaching presence in unexpected ways.

### ***Students***

The case of Daniel clearly shows how students influenced his teaching presence in a way that was not compatible with his own conceptualization of the course. As I have discussed, Daniel consciously avoided dominating the discussion, and engaged as a co-participant to reduce the instructor-student hierarchy. However, in his first interview he talked about how students sent him private emails asking that he get back into the discussion and take control of it (the student evaluations of the course also showed that some of the students felt that he should have had a stronger presence at times). Daniel responded by increasing his involvement in the discussions, but the style of his posts didn't take on a more authoritarian voice—they were consistent with how he had been posting earlier in the course.

Both Daniel and John also experienced tension with students and the rules and division of labour components of the activity system. On at least two occasions John felt that some students were asking for too much assistance with an assignment, and he



responded in a way that prevented himself from getting caught doing part of the assignment for them. Daniel also expressed frustration when students used the discussion forum to ask for clarifications about things that were already presented in the course documents, but wasn't able to resist it as effectively as John. Daniel felt that this type of interaction was unnecessary and unproductive, but he engaged in it nonetheless.

In the case of William, at least one student (ME Student A) demonstrated that he had expectations of an authoritarian type of instructor presence, but William resisted by repeatedly redirecting the student's attention to include the postings of the other students. In my own case, student expectations lead me to engage in different ways at different times. I found myself initially summarizing the discussion at student requests (something I don't normally do) and attempting to push the discussion to a deeper level when students expressed that it wasn't challenging enough. However, these latter examples clearly show how tensions can lead to positive developments in an instructor's teaching presence—in my case I felt that these tensions forced me to adapt my practice in a way that would benefit students' learning. In William's case, ME Student A eventually came to appreciate William's approach, as evidenced in his interview and instructor evaluation.

### ***Co-instructors***

With the exception of William, all of the cases in this study were involved as co-instructors, where they shared the course space with another instructor. In some cases this

meant that the instructors had separate private interaction spaces with their assigned students, but for the most part some or all interaction spaces were shared. I found that activity theory was an especially useful framework for looking at the dynamics of co-instructors in a shared activity system. In this study, co-instructors were both a constraint and an affordance in somewhat contradictory ways.

Both Daniel and John were teaching with the same co-instructor (Phillip), yet both had very different experiences. Daniel felt quite strongly that he benefited from the presence of the co-instructor, and viewed him as an important mentor who supported him and offered good advice when needed. As I have already discussed, Daniel recognized this person's expertise and experience and had no problems positioning himself somewhat in deference to this instructor. In this particular case, it is not clear to what extent this influenced his teaching presence, beyond the fact that he made occasional references to the co-instructor in his discussion forum postings. John also valued the expertise and was glad that he was there to assist him with what was his first online teaching experience. However, John felt that his own teaching presence was affected by how he perceived he was being positioned by the co-instructor, and the tension it created with his own instructor identity. In activity theory terms, the presence of co-instructors created tensions between the rules and division of labour components of the activity system, and therefore influenced teaching presence. As Thorne (2005) has argued (in the context of language education) it is important for "outcomes of a local action to enhance an individual's capacity to perform relevant and competent identities" (p.401). In other words, instructors' actions are closely tied to their identities. John's displeasure with his

online teaching experience demonstrates how constrained he was in performing a competent identity, and in his interview he offered several recommendations for teaching in co-instructor contexts.

In the case of Linda, there is evidence from both the interviews and the discussion forum postings that she had a strong awareness of the co-instructor and was sensitive to this symbiotic relationship. Linda stated that she didn't experience any tension with the co-instructor, but acknowledged that in co-teaching contexts she is never 100% herself, and felt the need to consult and obtain consensus on some issues before posting. Linda also was careful to sign her postings with both of our names on messages that were shared announcements and joint postings, thus showing how this awareness of the shared task influenced her teaching presence. John, on the other hand, noted repeatedly that his co-instructor, Phillip, neglected to do this, and felt that this contributed to his perception that he was positioned as a subordinate.

Joanne negotiated a division of labour with myself that put her into a role with which she was more comfortable, by becoming responsible for grading assignments and giving feedback. In this way, the presence of a co-instructor was an affordance. In my own case in this context, this division of labour afforded me with the opportunity to put more effort where I was comfortable (in the discussion forum) and freed me from a task that I felt was onerous and time consuming.

Finally, in the case of myself in the Metropolitan University course, the co-instructor was critical in accommodating my linguistic deficiencies, and her presence compensated for the lack of my own. In at least one message where I misunderstood a

student's query, Linda was able to then catch the misunderstanding and respond to the student's question appropriately. In this example, the co-instructor was a resource that I was able to draw on.

### **Teaching presence in global contact zones**

The cases in this study were examples of teaching in “global contact zones” (Singh and Doherty, 2004), composed of distance online learning contexts where Canadian instructors were transplanted into a local context (Metropolitan university, Online Academy) or where a local context could be described as international and intercultural (ME course). As has been discussed by others (Singh and Doherty, 2004; Crabtree and Sapp, 2004; Scarino, Crichton, and Woods, 2007) it is inherently problematic to attempt to classify these contexts in terms of culture or practices. Crichton, Paige, Papademetre, and Scarino (2004) have stated that “all learning, no matter what the discipline, content of teaching and learning or mode of delivery, ‘involves language, culture, communication and learning how to communicate and interact’ (p. 43, in Scarino et al., 2007, p.222). Scarino et al. identify a gap in the research on international education where the “mediating role of language and culture in teaching, learning and assessment” has not been discussed (2007, p. 224). They posit “as soon as the mediating role of modes of delivery, and language and culture are recognized, there is a need to understand collaboration differently; that is, to reconceptualize it as interaction mediated both by mode of delivery and by language and culture at all points, including

teaching, learning, and assessment” (2007, p. 230). In a similar vein (and from a language education perspective), Morgan and Ramanathan (2005) remind us that while:

Linked CMC classes facilitate global conversations or virtual ‘contact zones’...the appearance or promise of commonality—a linked CMC class, for example—can, in effect, be polarizing. Conversely, the appearance of diversity can, in effect be superficial and assimilative. (p. 159)

Similarly, Singh and Doherty (2004) problematize the cultural consequences of educational globalization, and argue that the ambiguity of culture in a globalized world:

Undermines teachers’ ability to know or predict their ‘Other’ students with any certainty through reproduced categories. Teachers at the frontline of globalization may have to take account of different versions of English, as well as new hybrid constructions of cultural identity, in day-to-day pedagogic encounters. (p. 6)

As a researcher who is highly sensitive to the role of language in academic contexts, it was surprising to me to discover that in three of the cases, the sociocultural contexts of the students, and in particular, linguistic considerations of the students were not on the instructors’ radar. This is not to say that the instructors weren’t aware of the cultural and linguistic diversity of the students, but the degree to which it had an effect on teaching presence was variable. In other cases, such as Linda and William, the linguistic

and cultural characteristics of the contexts had considerable influence on teaching presence. The course that William taught was composed of students located internationally, international students located locally, local students who immigrated to Canada from elsewhere, and local students who had lived internationally. William structured his course in a way that would bring the multiple sociocultural contexts and experiences of the students to the fore by having them complete and share an in depth language/culture language and culture autobiography as part of the course requirements. This language and culture autobiography then served to position the students as multidimensional participants who were the experts in their own cultures and languages, rather than position them as deficient in English. This activity also provided William with a way to target his teaching presence in a more individualized way.

With Linda's case it is beneficial to contrast her experiences with the Online Academy context and the Metropolitan University context. In the Online Academy her awareness of the sociocultural context of the students was somewhat limited and largely anecdotal. Since she herself was interacting in the course in her second language, she was also struggling with the same linguistic constraints as the students. This influenced her teaching presence to some degree, since she wasn't always sure whether students were misunderstanding the content, or whether they simply weren't communicating in a way she could understand. In contrast, she felt much more confident with her presence in the Metropolitan University course, and as I have argued, directed her teaching presence towards an imagined community, of which she was a member by virtue of her own linguistic background and Mexican identity. By having a better understanding of the

students, Linda felt her teaching presence was more on target in Metropolitan University course than in the Online Academy.

In the case of Joanne and Daniel, there was a feeling that their instructor presence depended on “knowing” the students better, but unlike Linda, this was less about knowing them as members of other sociocultural contexts and more about simply being able to identify them beyond a name and a number on the screen. It is observable that these two instructors addressed this need in similar ways—both instructors felt they got to know their students through reading their assignments and giving feedback, and Daniel additionally printed out their discussion contributions as a way of zoning in more closely on who they were. It is also interesting to note that Joanne declared that after meeting the students face-to-face at the closing session in Croatia she would have done everything differently. This perhaps highlights how for some instructors, the online teaching experience as currently constructed is not be able to provide them with what the face-to-face context can facilitate.

It is also important to contrast the cases of Linda, John, and myself in how we addressed non-participation. While Linda and I adopted a sociolinguistic explanation, John adopted a course design explanation. In both cases, there was a need on the part of the instructors to understand reasons for non-participation and to rectify it. In this regard, it is useful to refer to Tatar (2005) who reminds us that (in US academic institutions), the lack of participation of non-native-English-speaking students (NNSE) is often attributed to cultural and educational background or lack of English communicative skills (p. 284). She notes that while talk is often considered the norm in academic communication “the

role of silence as a means of communication has mostly been ignored...what non-native English speaking students perceive as silence and talk in the classroom needs to be explored from the point of view of these students” (Tatar, 2005, p.284). This is particularly relevant to discussions of presence in the ‘global contact zones’. Unfortunately, it was beyond the scope of this study to investigate causes of non-participation across contexts.

As has been noted elsewhere in the case of online students participating in English as a second language (Carey, 1999; Carey and Guo, 2003; Yildiz and Bichelmeyer, 2003) teaching in the global contact zone also required linguistic adjustments and challenges for the instructors and served to shape teaching presence. Just as NNSE students do not want to be perceived as being less competent than their peers and adopt silence or non-participation (Tatar, 2005, p.292), I struggled with being positioned as an expert while unable to communicate effectively in my third language. The struggle of the non-native speaking teacher has been well-identified in language education research. For example, drawing on a language teacher education course room context, Singh and Richards (2006) identified three struggles: sense of inadequate language knowledge, language impeding participation in group-based collaborative learning, and clash of cultures of learners, where expectations of the roles of teachers and learners differ (p. 156).

The role of imagined community (Anderson, 1991; Norton, 2000) in shaping teaching presence was also evident in cases Linda and Tannis. In an online teaching context, it is useful to begin with Kanno and Norton’s (2003) definition of imagined



community: “Imagined communities refer to groups of people, not immediately tangible and accessible, with whom we connect through the power of the imagination” (p.241).

For Fox (2004) the concept of imagined community embodies a continuum of virtuality and physicality (p. 48). “For an individual to be able to ‘picture’ the virtual community, there must exist some semblance of a physical community system, or even visual Web content, from which he or she can begin to imagine a collective identity” (p.48). He asks “what, then, can we define as the point where the technology that drives virtual interactions intersects with an individual’s imagined sense of the participants in a community?” (p.52). Similar to Norton (2000), Fox (2004) notes the power of imagined community in determining whether one has access to the community, and he suggests that “for individual members to truly belong, they arguably must be able to both imagine the community and in turn perceive themselves as a part of that community” (p. 54).

Language is an inherent aspect of belonging, and Kanno and Norton (2003) cite the case of a student, Rui, for whom language mastery was a requirement for participation in his imagined community of Japanese speakers. In case Tannis mastery of Spanish was an important rule shaping the goal of community that I had invoked for the Metropolitan University course. While Kanno and Norton note that the rule-based nature of imagined communities has an important influence on learners’ educational goals, case Linda also illustrates that imagined community has a role in shaping the instructor interactions and the position they adopt in those communities. Therefore, imagined community is not only a component of the conceptualization of the interaction space, but closely tied to the

position and identities of the instructor. In this way, in negotiating interaction spaces students and instructors are also negotiating their imagined communities.

### **The role of course design and teaching presence**

It is hardly a new finding that course design has an influence on teaching presence. Different pedagogical approaches require different types and amounts of facilitation—for example, courses that are largely constructed as self-directed will engage the instructor differently than courses that adopt a problem-based learning approach. Similarly, intensive courses, such as the one in Case William, have also been found to “permit alternative teaching strategies and a different teaching style, possibly allowing for more interaction among the students” (Hinger, 2006, p. 114; Lapkin et al., 1998, p.7). What this study has highlighted is how the course design was a constraint or an affordance to the instructor, and how it influenced teaching presence.

I have already discussed how Daniel was comfortable with the design of the course that allowed him to take more of a back seat role in the discussions. The course that Daniel taught was also unique in that two students were given release time from an assignment to attend to any technical questions that the group had. Since the course introduced and required that students experiment with new educational technologies, the often cited (eg. Berge, 1995; Anderson et al., 2001) ‘technical’ role of the online instructor was transferred to some degree to the students.

The course that Joanne had authored, designed, and taught was carefully constructed so that it would not require the intense amounts of instructor interaction that many online courses seem to require. Discussions took place over a longer period of time, and were timed so as not to overlap with key marking times, where the instructors' time would be consumed by this task. This created a certain affordance for the instructors, but there is evidence to suggest that it was at the detriment to the learners. Student evaluations and interviews show evidence that despite the fact that they understood that there were periods of time where no engagement was required, this had the effect of demotivating them. This observation is in line with Swan (2001) who found that along with clarity of design, interaction with instructors and active discussion among course participants influenced student satisfaction and perceived learning. Additionally, as co-instructor, I felt that teaching within this structure was less time consuming, but it ultimately caused me to also feel disengaged at times, and I was both more interested and comforted when there was an active discussion taking place. Of course, this was in consistent with my constructivist-influenced (and well-established) belief that active and overt discussion means that students are learning more than non-active participants. Of course, when placed in a teaching context where I was required to interact in my third language, I felt relieved that the course structure didn't require a lot of instructor presence on my part, since it would have been difficult for me to be as active and respond as quickly as I could have had I been teaching in English.

In one case, the course design could be viewed as having a negative influence on teaching presence. In the Online Academy course that Linda and I taught, students were

expected to engage in collaborative discussions for 25% of their course grade. For reasons that are still not clear, students in Linda's group participated very little, despite frequent attempts try and understand what the problem was and how she might address it. Linda was aware that a constructivist approach required that students be active participants, and was concerned that without this participation students wouldn't learn. A joint decision between the instructors and the institutions was made to assign two Croatian tutors to facilitate the discussions in their first language for the remainder of the course. Ultimately, this had little effect, but the assigning of the two tutors meant that Linda's presence was taken out of the discussions and remained only in emails and assignment feedback.

In activity theory terms, course design is situated in the rules component (or tools) and determines the tools (rules) and division of labour. Therefore it is not surprising that course design would have such a mediating role in teaching presence, as evidenced in these cases.

## **Agency**

In discussing how various components of the activity system mediated instructor presence, it is also important to highlight the role of instructor agency in the negotiation of teaching presence. Thorne (2005) has noted "people exhibit agency and creativity as they adapt to, reproduce, and often also transform their symbolic and material environments" (p. 403). This study demonstrates that instructor agency is exercised in highly variable ways. Daniel experienced several constraints in his context but was able

to mediate them with other resources at his disposal. This included googling the names of his students to find more information about them. He also addressed the dissatisfaction he felt with discussion forum discourse by borrowing the weblog discourse style with which he was more comfortable.

John countered what he perceived was an inferior positioning of himself by adopting a subtle counter discourse in his postings, and therefore claiming a more legitimate positioning and resisting marginalization. Joanne addressed her perceived marginalization from the discussion forum by taking on a more prominent role in providing feedback to students on the assignments.

Linda addressed the lack of student participation by substituting her presence with that of the Croatian tutors who could address the potential linguistic gap. In the Metropolitan University course, both Linda and I got around a technological constraint by posting in a different section of the CMS to avoid problems with navigating through pages of messages.

In my own case in the Metropolitan University context, I adopted several strategies to overcome my linguistic deficiencies. I modeled some of my interactions from those of Linda's, I used online translators to help me with composing messages, and I adopted a pattern in my discussion forum posts that provided resources to students where they could find more information about something that I had difficulty explaining in Spanish.

### **Summary: Cross case analysis findings**

The two research questions that guided this study were:

1. How is teaching presence negotiated in international online contexts?
2. What are the constraints and affordances that influence this negotiation?

The cross case analysis findings can be summarized as follows:

- Instructors draw on resources, and make adjustments to the division of labour to address tensions and constraints
- Instructors in the same course can experience different tensions
- Teaching presence is influenced by linguistic constraints
- Technology was both a constraint and a resource
- Identity, positioning, and conceptualization of the interaction spaces were intertwined as influences in the negotiation of teaching presence

## CHAPTER SIX: SUMMARY, IMPLICATIONS AND CONCLUSIONS

### **Introduction**

This section provides a summary of the study, underlines its importance and limitations, and suggests further avenues for future research.

### **Summary**

This study investigated the question “how is teaching presence negotiated in online contexts?” and “what are the constraints and affordances that influence this negotiation?” I adopted activity theory as a framework in addition to the following assertions in order to investigate these questions.

1. How instructors position themselves and are positioned will influence their teaching presence.
2. Instructor identities will influence and will be influenced by their teaching presence.
3. The dynamics of the activity system will influence and be influenced by teaching presence.

All of the cases employed the use of discussion forums to engage students in class activities, within a constructivist course design. However, my review of the literature did not find any studies that have made a connection between an instructor’s

conceptualization of discussion forums and their teaching presence. The evidence in this study suggests that even though courses may share common design features, ultimately the instructor's conceptualization and implementation of the design will influence how the instructor interacts. Furthermore, cross case analysis reveals that a discussion of teaching presence necessitates a discussion of positioning, identity, and instructor conceptualization of the online interaction space. In fact, it is difficult to discuss these as separate ideas, since they appear to be interrelated and interdependent components.

On the one hand, conceptualizations of the online environment are closely related to research on teaching beliefs and teacher cognition. In a comprehensive review of research on teaching beliefs and practices at the university level, Kane, Sandretto and Heath (2002) stated:

Research into teachers' beliefs, conceptions, attitudes, orientations, (personal) practical theories, and implicit or subjective theories about teaching is grounded in the understanding that these concepts drive teachers' practices. (p. 204)

They concluded that there is insufficient evidence to draw conclusions about the relationship between teachers' beliefs and actual practice, and highlighted the methodological weakness of the studies they reviewed for failing to observe the relationship between the two (Kane, Sandretto & Heath, 2002. p.204). Since none of the studies they reviewed refer to online teaching contexts, it is important to note that the online teaching context affords the opportunity to observe teaching practice through the



online transcripts that are produced as part of the teaching-learning dialogue. Although teaching beliefs were not the focus of this study, the cases demonstrated that instructors directed their teaching presence by drawing on frames of reference (e.g. John, online classroom) or conceptualizations of the interaction space in conjunction with their own beliefs/theoretical knowledge about teaching and learning (e.g. Constructivism =community). They directed their teaching presence towards this conceptualization, and tensions occurred when circumstances/mediators prevented them from achieving this conceptualization. In the context of international/intercultural education, this has important implications, and raises the question—how do instructors and students each arrive at a mutually shared conceptualization of the interaction space? This resonates with Crabtree and Sapp's (2004) own observation that teaching in an international context requires both students and instructors to abandon certain expectations to arrive at a negotiated and “mutually agreeable classroom culture” (p.124). While course designers will inevitably point to the importance of the syllabus, course expectations and guidelines, and student orientations as serving this function, cases Linda and Tannis illustrated how two instructors sharing the interaction space and course artifacts, arrived at different conceptualizations.

Additionally, if conceptualization of the interaction space is related to instructor beliefs/ theoretical knowledge about teaching and learning, then teaching presence is also closely tied with instructor identities and the evolution of those identities. Twiselton (2004) has noted:

The identity of student teachers, and the way this impacts on their reading of the teaching situation, structures their capacity to identify and use the opportunities for action that are available within the activity system and their identities are, in turn, shaped by these opportunities. (p. 159)

This observation demonstrates the relationship between conceptualization and identity. In her study, student teachers directed their teaching in accordance with various frames of reference—task managers; concept/skill builders; and curriculum deliverers—which had an effect on the extent to which “authentic activity” was possible. Twiselton observed that activity theory enabled “an analysis of the formation of the social practices within which identities are (per)formed” (p. 163). As I have argued, in my case of teaching in the Metropolitan University course, my own rigid frame of reference was one of the things that prevented me from adjusting to the conditions of the teaching context. Case Linda illustrated how the performance of and instructor’s identity varies across contexts—her cultural (social) identity as a Latin American teaching in Spanish shaped her teaching presence differently than in a Croatian (English) teaching context.

As I have demonstrated, when frames of reference are imported from prior teaching experiences (e.g. f2f teaching or other online teaching experiences) they can generate tensions in the negotiation of teaching presence. Engeström’s second principle of activity theory encompasses the idea that positioning and instructor identity are brought forward and shaped by the activity: “the division of labor in an activity creates different positions for the participants, the participants carry their own diverse histories,

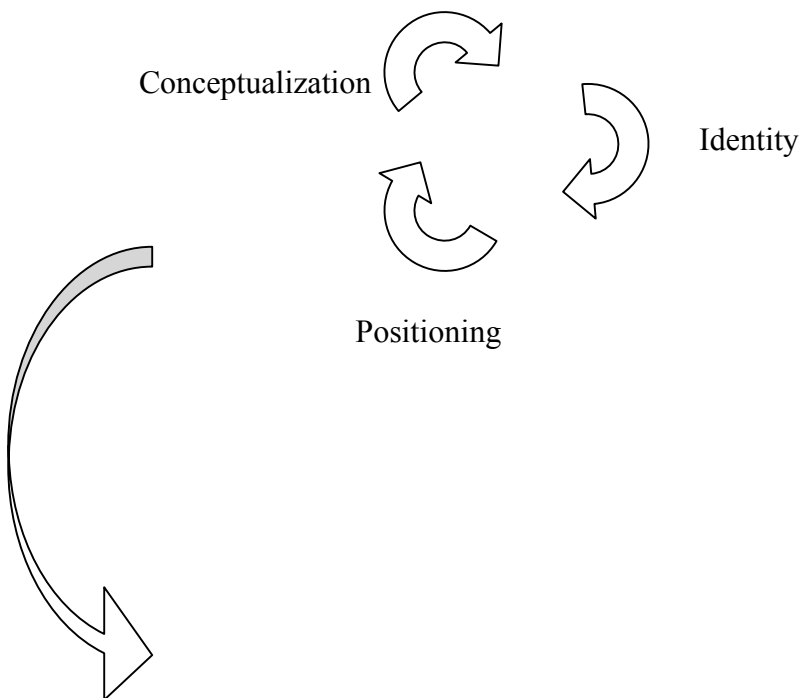
and the activity system itself carries multiple layers and strands of history engraved in its artifacts, rules and conventions” (2001, p. 136). Fanghanel (2004) found when examining university teacher education in training with university teacher in practice, dissonances occurred between the two as a result of competing educational ideologies, systems and structures and curricula. She notes “disjunctions transpired, on the other hand, when they expressed an inability to reconstruct practices explored in the courses at local level—often on epistemological grounds, or by invoking practical or structural causes” (p. 584). John invoked his 22 teaching experiences as a frame of reference to guide his positioning in his course, but this proved incompatible with the context and tensions arose. Other cases also demonstrated how tensions with positioning are closely related to tensions with identity. In fact, tensions occurred in all cases when how an instructor was positioned (by technology, co-instructors, or students) was not in congruence with their identity.

Agency is an important component of third generation activity theory, and the cases provided evidence that instructors drew on resources, in the form of tools and community members (co-instructors) to address tensions and constraints in the activity system. The level of agency that an instructor demonstrated was a function of not only their ability to draw on these resources, but the extent to which they were able to reconcile their identities/positioning within the conditions of the environment. Agency is required to reconstruct practices and address tensions. The literature on cultural historical activity theory, in particular the work of Holland et al. (1999) views identity as guided by social scripts, but transformed through individual agency. Most would agree

that teaching as a practice is its own social script, but the ambiguity of an online context seemed to both constrain and facilitate individual agency.

### **An Activity Theory model of teaching presence**

I propose that within an activity theory framework, the role of identity, positioning and conceptualization, as it relates to teaching presence, can be illustrated as follows.



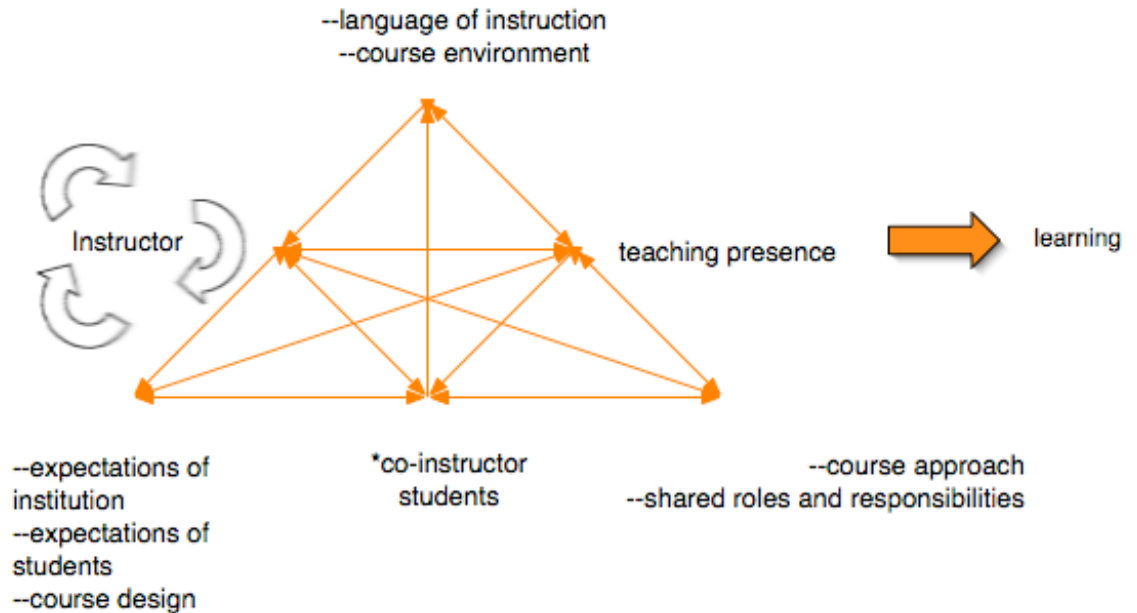


Figure 7. Conceptualization, identity, and positioning in relation to the instructor activity system

I have demonstrated that identity, positioning and conceptualization of the interactions spaces are interrelated and interdependent influences on teaching presence. These necessarily influence and are influenced by the activity system, which describes the context in which the activity is taking place. While I am aware of (and have described in Chapter 2) the ongoing debate in cultural-historical activity theory between the

self/collective emphasis, because the focus of this study centred on the instructor as subject, it is appropriate to situate these influences as related to the subject. Figure 6 illustrates that teaching presence within a course context (described by the AT model), is influenced by identity, positioning and conceptualization. It also illustrates that identity, positioning, and conceptualization are not only brought to the teaching context, but are also being influenced by the context, as described in the six cases that formed this study. In simplified terms, the instructor activity system is describing to some degree what students and instructors sometimes refer to as the ‘chemistry’ of an online course.

### **Significance and implications of the study**

The purpose of this study was to develop and evaluate a sociocultural perspective of the critically important construct of teaching presence. This perspective claims that teaching presence is a negotiation that occurs between instructors and the teaching context, as defined by the activity system. In this view, instructors are not performing preconceived roles, but are engaged in a dynamic process in which teaching presence is shaped through the mediating components of the activity system. In adopting this view, I was able to gain a better understanding of the ‘why’s’ of teachers’ interactive decisions in online teaching contexts. I feel this exploration is particularly timely and relevant given the emergence of online teaching contexts where instructors and students in an online community of inquiry might not share the same sociocultural contexts, described in this study as ‘global contact zones’ (Singh & Doherty, 2004). Since language is an inherent

tool for interaction in DE courses, I would encourage DE researchers to benefit from the perspectives being explored in the language education field with respect to the internationalization and intercultural processes of higher education. Even though the online environment provides researchers with the ideal opportunity to closely examine online teaching, this opportunity has been underexploited. This research project has addressed this gap in the literature, and might provide a new way for thinking about online teaching. The significance of this study ultimately has implications in three orientations:

- improve practice of individual instructors by providing a greater awareness of how their teaching presence is negotiated within a teaching context;
- to improve policy around expectations of online instructors and the type of roles they are expected to take on as instructors in complex settings, and, in particular, global contact zones;
- to improve design of online courses by giving more attention to the sociocultural constraints that could ultimately influence their teaching presence.

There are also implications for teaching, design, the community of inquiry model, and activity theory that encompass the above orientations. These are described in greater detail below.

### ***Implications for teaching***

This study shows that describing instructor interactions as roles that are adopted according to the demands of the course design or institutional expectations is a limiting description of the considerable negotiation that takes place in an online teaching context. As instructors, having insight and understanding that there is a strong relationship between one's own conceptualization of a course and how they direct their teaching is useful when tensions arise. Additionally, since all teaching involves operating in systems where constraints and tensions are at play, it is important to identify resources that can assist in addressing these tensions. Technology can be a resource in some cases—for example if “knowing students” is critical to an instructor's teaching presence, this could be addressed in design, by employing other technologies (eg. synchronous chat or videoconferencing), the use of autobiographies, or simply building in “time-to-know”.

In particular, there are important implications related to the evaluation of instructor performance. Competing expectations of students and instructors, in relation to course design, serve to influence how students ultimately evaluate instructors. In this regard, I concur with Scanlon and Isroff (2005) who suggest that activity theory is a useful framework for the evaluation of technology based teaching in higher education in providing meaningful interpretations of instructor and student experiences for summative purposes. Related to this, there needs to be recognition of the importance of the complexities of online teaching through a second language, particularly in global contact zones.



In the two intensive courses (Narrative as Inquiry, and Teaching and Learning Theories) the compressed timeline required that instructors respond to student posts in a timely manner. Blignault and Trollip (2003) have noted that in their context anecdotal evidence from students pointed to the importance of timeliness of instructor responses, but observe that for research purposes, obtaining data on timeliness creates methodological problems. For example, (like Case Daniel) some instructors choose to delay their own responses to encourage students to participate and take ownership of the discussion, while others (such as Case William and Case Tannis) view timely and frequent instructor interaction as an important mechanism to the development of an online community. While it was beyond the scope of this study to explore the critical issue of timeliness of teaching presence, it emerged as an important finding with obvious implications for teaching. Specifically, it raises the question as to whether students view timeliness of instructor responses as more valuable to their learning than quality or length of instructor post.

Finally, at the policy level, it is observable that while online teaching creates opportunities for instructors who desire the ability to teach under more flexible circumstances, the need to juggle this type of work in addition to maintaining other employment creates certain challenges. Time was mentioned as a constraint in all six cases, and the fact that five of the six instructors were employed in adjunct roles is a testament to how instructors are employed in a globalized education system, where instructors (in some contexts) are perhaps alternatively viewed as a cultural capital or

second class instructors. It is no doubt timely to begin to debate and further explore this complex topic.

### ***Implications for the community of inquiry model***

This study has shown that while the community of inquiry model is a useful starting place for looking at online communities of inquiry, a different methodology can provide additional insight to further inform this model. The community of inquiry model is useful for gaining a descriptive understanding of instructor interactions in discussion forums, but does not enhance our understanding of the considerable complex negotiation that instructors engage in while facilitating a course. Therefore, I propose the following sociocultural definition of teaching presence: *“the negotiation of instructor interactions within a mediated context with the object of attending to student learning”*.

### ***Implications for design***

In distance education contexts, course design is frequently not carried out by the instructor who teaches the course. One of the major findings from this study was that instructors conceptualize interaction spaces differently, and this shapes their own teaching presence. Course designers should not overlook this aspect—a course designer might conceive of a discussion forum as a place for developing community through interaction, while an instructor might see it as place for focused efforts towards

completing activities. Interaction spaces can take many forms, and as this study showed, the fact that two instructors can be sharing the same interaction space in the same course and conceptualize it very differently has important implications, since they might actually be engaging in different, and potentially competing practices.

As I argued in Chapters 1 and 2, the prevalence of constructivism as an underlying approach to online course design has lead to generalized views as to what a constructivist course should not only look like, but how it should be taught. This study has shown considerable variance in how instructors perceive the latter, in particular Cases William and Daniel. While William's course adopted what Moore (1979, 1989) would call a "low structure", and Daniel's course adopted a "high structure" the design of these two courses were clearly guided by constructivist principles. Yet, despite two very different instructor approaches to facilitation, and opposing degrees of structure, students in these two courses participated on average the most frequently of all the courses. This finding suggests that it is perhaps timely for both designers and instructors to begin exploring more unconventional approaches to online courses, and perhaps reexamine their views of best practices for online learning.

### ***Implications for activity theory***

While activity theory is not well suited to looking at moment-to-moment engagement in the activity system, it is useful for providing a way of addressing key

events in the teaching context. Through interviews with instructors, students, program directors, and discussion forum postings I was able to elicit the key events and analyze them within the framework of activity theory. In this regard, activity theory is a useful tool and has great potential to draw attention to the complexities of distance education environments. I also agree that it is a particularly useful framework for looking at intercultural contexts. However, I argued that the sociocultural notions of identity and positioning in relation to third generation activity theory have been under-theorized. Since the data presented in this study clearly showed that both identity and positioning had an important mediating role in the negotiation of teaching presence, both in terms of influencing the tensions that instructors face in online teaching, as well as how instructors address these tensions, it is timely to represent these concepts in relation to the ubiquitous triangles. The model I proposed attempts to address this gap.

### **Future research**

There were several limitations to this study that could be addressed in future research. In particular, where student perspectives on instructor presence and their own perceptions of learning were obtained, this was useful in providing not only triangulation of data, but in providing an essential perspective of the activity system. While it is never possible to obtain a complete picture of student perspectives due to ethical constraints or the difficulty of finding students who have the time to participate in a study, it is no doubt

worthwhile to try and obtain some data from students that can help contribute to the overall picture.

Although in two of the cases I was able to follow teaching presence in more than one teaching experience and over a longer period of time, this study presented for the most part a snapshot of teaching presence within a bounded context. A longer, ethnographic approach would no doubt provide a different perspective of teaching presence as it unfolds across multiple experiences over a longer period of time, particularly with regards to the changing position and identity of the instructor.

In this study, I included reflections and analysis of my own instructor presence across two courses, and I would suggest that an auto-ethnographic methodology applied to investigations of teaching presence would undoubtedly provide important contributions to understanding this phenomena.

## **Conclusions**

This study shows that instructor presence is negotiated in many ways, within the constraints and affordances of the activity system, and in conjunction with instructor positioning and identities. I believe that a sociocultural perspective of teaching presence is useful for productive discussion about the relevance of course design, sociocultural contexts, and instructor identity in the practice of online teaching in international contexts. I suggest than further attempts to describe best practices without these considerations is in some ways equivalent to child raising advice given to parents via

books, media, and other “knowledgeable” sources: such information and advice is useful, but highly variable and unpredictable when applied, despite the best intentions.

## REFERENCES

- Ahearn, L. (2001). Language and agency. *Annual Review of Anthropology*, 30, 109-137.
- Anderson, B. (1991). *Imagined communities: Reflections on the origin and spread of nationalism*. New York, NY: Verso.
- Anderson, B. (2004). Dimensions of learning and support in an online community. *Open Learning*, 19(2), 183-190.
- Anderson, T. (2003). Getting the mix right: An updated and theoretical rational for interaction. [Electronic version]. *International Review of Research in Open and Distance learning*, 4(2).
- Anderson, T., Rourke, L., Garrison, R., Archer, W. (2001). Assessing teaching presence in a computer conferencing context. *Journal of Asynchronous Learning Networks*, 5(2), 1-17.
- Basharina, O. (2005). *An activity system analysis of international telecollaboration: Contexts, contradictions and learning* Unpublished doctoral dissertation, The University of British Columbia (Canada).
- Beaudoin, M. F. (2002). Learning or lurking? tracking the “invisible” online student. *Internet & Higher Education*, 5(2), 147-156.

- Belfer, K., Morgan, T., Underhill, C. (2005). CARNet/UBC: Three approaches to a case study in an international collaboration. *CADE 2005 Conference: Learning Virtually.... Anywhere*. UBC, Vancouver, Canada.
- Belz, J. (2003). Linguistic perspectives on the development of intercultural competence in telecollaboration. *Language Learning & Technology*, 7(2), 68-117.
- Berge, Z. L. (1995). Facilitating computer conferencing: Recommendations from the field. [Electronic version]. *Educational Technology*, 15(1), 22-30.
- Beuchot, M., Bullen, M. (2005). Interaction and interpersonality in online discussion forums. *Distance Education*, 26(1), 67-87.
- Blignaut, S. & Trollip, S. R. (2003). Developing a taxonomy of faculty participation in asynchronous learning environments – an exploratory investigation. *Computer and Education*, 41, 149-171.
- Bogdan R. C., & Biklen, S. K. (1992). *Qualitative research for education: An introduction to theory and methods*. Boston: Allyn and Bacon.
- Bourdeau J. & Bates A. (1997). Instructional design for distance learning, In Dijkstra, S., Seel, N., Schott, F., & Tennyson R., (Ed.), *Instructional design: International perspectives: Solving instructional design problems* (pp. 369-397). Mahwah, NJ: Lawrence Erlbaum.



- Bourdieu P. (1991). *Language and Symbolic Power*. Cambridge, MA: Harvard University Press.
- Brown, R. (2001). The process of community building in distance learning classes. *Journal of Asynchronous Learning Networks*, 5(2).
- Bucholtz, M., Hall, K. (2005). Identity and interaction: a sociocultural linguistic approach. *Discourse Studies*, 7(4-5). 585-614.
- Carey, S. (1999). The use of WebCT for a highly interactive virtual graduate seminar. *Computer Assisted Language Learning*, 12(4), 371-380.
- Carey, S. & Guo, XG. R. (2003). Conditions for ESL acquisition on WebCT. *The International Journal of Learning*, 9, 491-498.
- Chen, Y-J., Willits. F. K. (1998). A path analysis of the concepts in Moore's theory of transactional distance in a videoconferencing learning environment. J. [Electronic version]. *Journal of Distance Education*, 13(2).
- Cole, M. and Wertsch, J.V. (1996) Beyond the Individual-Social Antinomy in Discussions of Piaget and Vygotsky. *Human Development*, 39, 250-256.
- Conrad, D. (2002). Deep in the hearts of learners: Insights into the nature of online community. [Electronic version]. *Journal of Distance Education*, 17(1). Retrieved December 12, 2005.

- Coppola, N., Hiltz, S.R. & Rotter, N. (2002). Becoming a virtual professor: Pedagogical roles and asynchronous learning networks [Electronic version]. *Journal of Management Information Systems*, 18(4), 169-189.
- Corbin, J., & Strauss, A. (1990). Grounded theory research: Procedures, canons, and evaluative criteria. *Qualitative Sociology*, 13(1), 3-21.
- Creswell, J. (1998). *Qualitative inquiry and research design; choosing among five traditions*. Thousand Oaks, CA: Sage Publications.
- Creswell, J. W. (2003). *Research design: Qualitative, quantitative and mixed methods approaches* (2nd Edition ed.). Thousand Oaks, CA: Sage.
- Crichton, J. A., Paige, M., Papademetre, L. & Scarino, A. (2004) Integrated resources for intercultural teaching and learning in the context of internationalisation in higher education (University of South Australia, Research Centre for Languages and Cultures Education).
- Crotty, M. (1998). *The foundations of social research*, London: Sage.
- Davies, B., & Harre, R. (1990). Positioning: The discursive production of selves. *Journal for the Theory of Social Behaviour*, 20, 43-63.
- Davies, B., & Harre, R. (1999). Positioning and personhood. In R. Harre, & L. van Langenhove (Eds.), *Positioning Theory* (pp. 32-52). Oxford: Blackwell.

- Dennen, V. P. (2005). From message posting to learning dialogues: Factors affecting learner participation in asynchronous discussion. *Distance Education*, 26(1), 127-148.
- Denzin, N. (1970). Strategies of multiple triangulation. In Denzin, N. (ed.) *The research act in sociology: a theoretical introduction to sociological method*, pp. 297-313, New York, McGraw-Hill.
- Denzin, N. K., & Lincoln, Y. S. (Eds.). (2005). *The Sage Handbook Of Qualitative Research* (3rd ed.). Thousand Oaks, CA: Sage.
- Dewey, J. (1933). *How We Think* (Rev. ed.). Boston: D.C.Heath.
- Dijkstra, S., Seel, N., Schott, F., & Tennyson R. (Ed.). *International perspectives: Solving instructional design problems*. Mahwah, NJ: Lawrence Erlbaum.
- Donato, R. (2004). Aspects of collaboration in pedagogical discourse. *Annual Review of Applied Linguistics*, 24, 284-302.
- Donmoyer, R. (1990). Generalizability and the single case study. In E. W. Eisner, & A. Peshkin (Eds.), *Qualitative inquiry in education: The continuing debate* (pp. 175-200). New York, NY: Teachers College Press.
- Duff, P. and Uchida, Y. (1997). The negotiation of teachers' sociocultural identities and practices in postsecondary EFL classrooms. *TESOL Quarterly*, 31, 451-486.

- Easton, S. (2003). Clarifying the instructor's role in online distance learning  
*Communication Education*, 52(2).
- Edwards, A. (2005). Let's get beyond community and practice: The many meanings of learning by participating. *Curriculum Journal*, 16(1), 49-65.
- Engeström, Y. (1987). *Learning by expanding*. Helsinki: Orienta-Konsultit.
- Engeström, Y. (1999). Activity theory and individual and social transformation. In Y. Engeström, R. Miettinen & L. Punamaaki (Eds.), *Perspectives on Activity Theory* (pp. 19-38). Cambridge, MA: Cambridge University Press.
- Engeström, Y. (2001). Expansive learning at work: Toward an activity theoretical reconceptualisation. *Journal of Education and Work*, 14(1).
- Engeström, Y. and Miettinen, R. (1999). Introduction. In Y. Engeström, R. Miettinen & R. Punamaki (Eds.), *Perspectives on activity theory* (pp.1-16). Cambridge, MA: Cambridge University Press.
- Engeström, Y., Miettinen, R., & Punamaki, R. (Eds.). (1999). *Perspectives on Activity Theory*. Aarhus: Aarhus University Press.
- Fanganel, J. (2004). Capturing dissonance in university teacher education environments. *Studies in Higher Education*, 29(5), 575-590.

- Fox, S. (2004). The new imagined community: identifying and exploring a bidirectional continuum integrating virtual and physical communities through the community embodiment model (CEM). *Journal of Communication Inquiry*, 28(1), 47-62.
- Garrison, D. R., Anderson, T., & Archer, W. (2000). Critical inquiry in a text-based environment: Computer conferencing in higher education. *The Internet and Higher Education*, 2(2-3), 87-105.
- Goodyear, P., Salmon, G., Spector, J. M., Steeples, C. & Tickner, S. (2001). Competencies for online teaching: A special report. *Educational Technology Research and Development*, 49(1), 65-72.
- Gray, B. (2004). Informal learning in an online community of practice [Electronic version]. *Journal Of Distance Education/Revue De L'éducation À Distance*, 19(1), 20-35.
- Greeno, J. (1997). On claims that answer the wrong question. *Educational Researcher*, 26(1), 5-17.
- Guba, E. G., & Lincoln, Y. S. (2005). Paradigmatic controversies, contradictions and emerging confluences. In N. K. Denzin, & Y. S. Lincoln (Eds.), *The Sage Handbook of Qualitative Research* (3rd ed., pp. 191-215). Thousand Oaks, CA: Sage.
- Gutierrez, K., Rymes, B., & Larson, J. (1995). Script, counterscript, and underlife in the classroom: James brown versus brown v. board of education. *Harvard Educational Review*, 65(3), 445-471.

- Harding, S. (1987). Introduction: Is there a feminist method? In *Feminism and Methodology* (Ed.), (pp. 1-14). Bloomington, IN: Indiana University Press.
- Harré, R., & van Langenhove, L. (1999a). The dynamics of social episodes. In R. Harré & L. van Langenhove (Eds.), *Positioning theory: Moral contexts of intentional action* (pp. 1-13). Oxford: Blackwell.
- Harré, R., & van Langenhove, L. (Eds.). (1999b). *Positioning theory: Moral contexts of intentional action*. Oxford: Blackwell.
- Henri, F. (1992). Computer conferencing and content analysis. I. In A. R. Kaye (Ed.), *Collaborative learning through computer conferencing: The Najaden papers* (pp. 115-136). New York: Springer.
- Hinger, B. (2006). The distribution of instructional time and its effect on group cohesion in the foreign language classroom: A comparison of intensive and standard format courses. *System*, 34, 97-118.
- Holland, D., Lachicotte, W., Skinner, D., Cain, C. (1998). *Identity and Agency in Cultural Worlds*. Harvard University Press, Cambridge, MA .
- Johnson, C. M. (2001). A survey of current research on online communities of practice. *The Internet and Higher Education*, 49, 45-60.

- Kane, R.G., Sandretto, S., Heath, C. (2002) Telling half the story: A critical review of the research into tertiary teachers' beliefs, *Review of Educational Research*, 72(2), 177-228.
- Kanno, Y. & Norton, B. (2003). Imagined Communities and Educational Possibilities: Introduction. *Journal of Language, Identity & Education* 2(4), 241-249
- Kaptelinin, V. & Nardi, B. (2007). Acting with Technology: Activity Theory and Interaction Design, *First Monday*, 12(4).  
[http://firstmonday.org/issues/issue12\\_4/kaptelinin/index.html](http://firstmonday.org/issues/issue12_4/kaptelinin/index.html)
- Kuutti, K. (1996). Activity Theory as a potential framework for human-computer interaction. research. In Nardi, B. (ed), *Context and Consciousness*. Chapter 2, 17-4.
- Lave, J. (1988). *Cognition in practice*. Cambridge, MA: Cambridge University Press.
- Lave, J., & Wenger, E. (1991). *Situated learning: Legitimate peripheral participation*. Cambridge, Mass: Cambridge University Press.
- Lea, M., & Nicoll, K. (Eds.). (2002). *Distributed learning: Social and cultural approaches to practice*. New York, NY: Routledge.
- Leontiev, A. N. (1978). *Activity, consciousness, personality*. Englewood Cliffs, NJ: Prentice Hall.

- Lincoln, Y., & Guba, E. (2000). The only generalization is: There is no generalization. In R. Gomm, M. Hammersley & P. Foster (Eds.), *Case study method* (pp. 27-44). London: Sage.
- Lincoln, Y. & Guba, E. (1985). *Naturalistic inquiry*. Thousand Oaks, CA: Sage Publications.
- Linehan, C., & McCarthy, J. (2000). Positioning in practice: Understanding participation in the social world. *Journal for the Theory of Social Behaviour*, 30(4), 435-453.
- Littleton, K., & Whitelock, D. (2004). (2004). guiding the creation of knowledge and understanding in a virtual learning environment *Cyberpsychology and Behavior*, 7(2), 173-181.
- Mason, R. (1991). Moderating educational computer conferencing. [Online]. DEOSNEWS, 1(19). (Archived as DEOSNEWS 91-00011 on [LISTSERV@PSUVM.PSU.EDU](mailto:LISTSERV@PSUVM.PSU.EDU)).
- Merriam, S. B. (1998). *Qualitative research and case study: Applications in education*, (Revised and expanded from Case Study Research in Education ed.). San Francisco, CA: Jossey-Bass.
- Meskill, C., & Anthony, N. (2005). Foreign language learning with CMC: forms of online instructional discourse in a hybrid Russian class. *System*, 33, 89-105.
- Miles, M. B., & Huberman, A. M. (1994). *Qualitative data analysis* (2nd ed.). Thousand Oaks, CA: Sage.



- Moore, M. G. (1973). Towards a theory of independent learning and teaching. *Journal of Higher Education*, 44(12), 661-679.
- Moore, M. G. (1989). Three types of interaction. *The American Journal of Distance Education*, 3 (2), 1-6.
- Morgan, B., and Ramanathan, V. (2005). Critical literacies in language education: Global and local perspectives. *Annual Review of Applied Linguistics*, 151–169.
- Morita, N. (2004). Negotiating participation and identity in second language academic communities. *TESOL Quarterly*, 38, 573-604.
- Morris, L. V., Finnegan, C., & Wu, S. (2005). Tracking student behavior, persistence and achievement in online courses. *Internet and Higher Education*, 8, 221-231.
- Morse, K. (2003). Does one size fit all? exploring asynchronous learning in a multicultural environment. *Journal of Asynchronous Learning Networks*, 7(1), 37-55.
- Murphy, K., Smith, P. & Stacey, E. (2002). Teaching presence in computer conferencing: Lessons from the United States and Australia. *Proceedings of International Conference on Computers in Education (ICCE 2002)*, 694-698.
- Murphy, K. L., Mahoney, S. E., Chen, C., Mendoza-Diaz, N. V., & Yang, Z. (2005). A constructivist model of mentoring, coaching, and facilitating online discussions. *Distance Education*, 26(3), 341-366.

- Nardi, B. A. (Ed.). (1996). *Context and consciousness: Activity theory and human-computer interaction*. Cambridge, MA: MIT press.
- Nonnecke, B., & Preece, J. (1999). Shedding light on lurkers in online communities. *Ethnographic Studies in Real and Virtual Environments: Inhabited Information Spaces and Connected Communities*, Edinburgh. 123-128.
- Norton Peirce, B. (1995). Social identity, investment, and language learning. *TESOL Quarterly*, 29(1), 9-31.
- Norton, B. (1997). Language, identity, and the ownership of English. *TESOL Quarterly*, 31, 409-429.
- Norton, B. (2000). *Identity and language learning: Gender, ethnicity, and educational change*. London: Longman.
- Norton, B. (2001). Non-participation, imagined communities, and the language classroom. In M. Breen (Ed.), *Learner contributions to language learning: New directions in research*. (pp. 159-171). Harlow, England: Pearson Education.
- O'Dowd, R. (2003). Understanding the "other side": Intercultural learning in a Spanish-English e-mail exchange. *Language Learning and Technology*, 7(2), 118-144.
- Offrir, B., Barth, I, Lev, J. & Shteinbok, A. (2003). Teacher-student interactions and learning outcomes in a distance learning environment. *Internet and Higher Education*, 6, 65-75.

- Paulsen, M. F. (1995). Moderating Educational Computer Conferences. In Z. L. Berge and M. P. Collins (Eds.) *Computer-Mediated Communication and the Online Classroom. Volume 3: Distance Learning*. (pp: 81-90). Cresskill, NJ: Hampton Press.
- Ragin, C. C. (1997). Turning the tables: How case-oriented research challenges variable-oriented research. *Comparative Social Research*, 16, 27-42.
- Renninger, K. A. & Shumar, W. (Ed.). (2002). *Building virtual communities*. New York, NY: Cambridge University Press.
- Richardson, J. C., & Swan, K. (2003). Examining social presence in online courses in relation to students' perceived learning and satisfaction. *Journal of Asynchronous Learning Networks*, 7(1), 68-88.
- Rossman, M. (1999). Successful online teaching using an asynchronous learner discussion forum. *Journal of Asynchronous Learning Networks*, 3(2), August 1, 2006 from [http://www.aln.org/alnweb/journal/Vol3\\_issue2/Rossman.htm](http://www.aln.org/alnweb/journal/Vol3_issue2/Rossman.htm)
- Rourke, L. (2005). *Learning through online discussion*. Doctoral dissertation, University of Alberta, Edmonton, Alberta, Canada.
- Rourke, L., Anderson, T., Garrison, D. R. & Archer, W. (2001). Assessing social presence in asynchronous text-based computer conferencing. *Journal of Distance Education*, 14(2).

- Rovai, A. P. (2002). Building sense of community at a distance. [Electronic version]. *International Review of Research in Open and Distance Learning*, 3(1), 1-15.  
Retrieved December 12, 2005.
- Rovai, A. P., & Barnum, K. T. (2003). On-line course effectiveness: An analysis of student interactions and perceptions of learning. *Journal of Distance Education*, 18, 57-73.
- Rovai, A. P., Ponton, M. K., Derrick, M. G., & Davis, J. M. (2006). Student evaluation of teaching in the virtual and traditional classrooms: A comparative analysis. *The Internet and Higher Education*, 9, 23-35.
- Russell, D. R. (2001). Looking beyond the interface: Activity theory and distributed learning. In M. Lea (Ed.), *Understanding distributed learning* (pp. 64-82). London: Routledge.
- Salmon, G. (2000). *E-moderating: The key to teaching and learning online*. London: Kogan Page.
- Scanlon, E., & Issroff, K. (2005). Activity theory and higher education: Evaluating learning technologies. *Journal of Computer Assisted Learning*, 21(6), 430-439.
- Scarino, A., Crichton, J. & Woods, M. (2007). The role of language and culture in open learning in international collaborative programs. *Open Learning*, 22(3), 219-233.

- Sfard, A., & Prusak, A. (2005). Telling identities: In search of an analytical tool for investigating learning as a culturally shaped activity. *Educational Researcher*, 34(4), 14-22.
- Shea, P., Pickett, A., & Pelz, W. (2003). Follow-up investigation of "teaching presence" in the SUNY learning network. *Journal of Asynchronous Learning Networks*, 7(2).
- Short, J., Williams, E., & Christie, B. (1976). *The Social Psychology of Telecommunications*. London: Wiley.
- Shumar, W. & Renninger, K. A. (2002). Introduction: On conceptualizing community. In W. Shumar, & K. A. Renninger (Eds.), *Building virtual communities: Learning and change in cyberspace* (). Cambridge: Cambridge University Press.
- Singh, G., Richards, J.C. (2006). Teaching and Learning in the Language Teacher Education Course Room: A Critical Sociocultural Perspective. *RELC Journal*, 37( 2), 149-175.
- Singh P., Doherty C. (2004). Global Cultural Flows and Pedagogic Dilemmas: Teaching in the Global University Contact Zone. *TESOL Quarterly*, 38(1), 9-42.
- Smith, R. O. (2005). Working with difference in online collaborative groups. *Adult Education Quarterly*, 55(3), 182-199.
- Snow, D. A., & Anderson, I. (1991). Researching the homeless: The characteristic features and virtues of the case study. In J. R. Feagin, A. M. Orum & G. Sjoberg

- (Eds.), *A case for the case study* (pp. 143-173). Chapel Hill: University of North Carolina.
- Stake, R. E. (1995). *The art of case study research*. Thousand Oaks, CA: Sage.
- Stake, R. E. (2005). Qualitative case studies. In N. K. Denzin, & Y. S. Lincoln (Eds.), *The sage handbook of qualitative research* (3rd ed., pp. 443-466). Thousand Oaks, CA: Sage.
- Stake, R. E. (2006). *Multiple case study analysis*. New York, NY: Guilford.
- Stein, D. S. and Wanstreet, C. E. (2003). Role of Social Presence, Choice of Online or Face-to-Face Format, and Satisfaction with Perceived Knowledge Gained in a Distance Learning Environment. *Paper presented at the Midwest Research to Practice Conference in Adult, Continuing and Community Education*. [Online at: <http://www.alumniosu.org/midwest%20papers/Stein%20&%20Wanstreet-Done.pdf>] (Retrieved: 9 May, 2004).
- Stetsenko, A. & Arieviditch, I.M. (2004). The self in cultural-historical activity theory. *Theory & Psychology*, 14(4), 475–503.
- Swan, K. (2001). Virtual interaction: Design factors affecting student satisfaction and perceived learning in asynchronous online courses. *Distance Education*, 22 (2), 306-331.

- Swan, K. (2002). Building learning communities in online courses: The importance of interaction. *Education, Communication, and Information*, 2(1), 23-49.
- Swan, K., Schenker, J., Arnold, S. & Kuo, C-L. (2007). Shaping online discussion: assessment matters. *E-mentor*, 1 (18). Available at: [http://www.e-mentor.edu.pl/\\_xml/wydania/18/390.pdf](http://www.e-mentor.edu.pl/_xml/wydania/18/390.pdf).
- Tatar, S. (2005). Why keep silent? The classroom participation experiences of non-native English-speaking students. *Language and Intercultural Communication* 5(3 & 4), 284-293.
- Tesch, R. (1990). *Qualitative research*. New York, NY: The Falmer Press.
- Thorne, S. (2003). Artifacts and cultures-of-use in intercultural communication. *Language Learning and Technology*, 7(2), 38-67.
- Thorne, S. (2005). Epistemology, politics, and ethics in sociocultural theory. *Modern Language Journal*, 89(3), 393-409.
- Tsang, W. K. (2004). Teacher's personal practical knowledge and interactive decisions. *Language Teaching Research*, 8(2), 163-198.
- Tusting, K. (2005). Language and power in communities of practice', in (eds) ,  
cambridge: Cambridge university press, pp. 36-54. In D. Barton, & K. Tusting  
(Eds.), *Beyond communities of practice: Language, power and social context* (pp.  
36-54). Cambridge, MA: Cambridge University Press.

- Twiselton, S. (2004). The role of teacher identities in learning to teach primary literacy. *Educational Review*, 56(2), 157-164.
- Vandrick, S. (1999). ESL and the colonial legacy: A teacher faces her “missionarykid.” In G. Haroian-Guerin (Ed.), *The personal narrative: Writing ourselves as teachers and scholars* (pp. 63-74). Portland, ME: Calendar Islands Publishers.
- van Langenhove, L., & Harré, R. (1999). Introducing positioning theory. In R. Harré & L. van Langenhove (Eds.), *Positioning theory: Moral contexts of intentional action* (pp. 14-31). Oxford: Blackwell.
- Varghese, M., Morgan, B., Johnston, B., & Johnson, K. (2005). Theorizing language teacher identity: Three perspectives and beyond. *Journal of Language, Identity, and Education*, 4(1), 21-44.
- Vonderwell, S. (2003). An examination of asynchronous communication experiences and perspectives of students in an online course: A case study. *The Internet and Higher Education*, 6, 77-90.
- Vygotsky, L. S. (1978). *Mind in society*. Cambridge, MA: Harvard University Press.
- Wallace, R. M. (2003). Online learning in higher education: A review of research on interactions among teachers and students. *Education Communication and Information*, 3(2), 241-280.



- Warschauer & R. Kern (Eds.) (2000). *Network-based language teaching: concepts and practice*. Cambridge: Cambridge University press.
- Wenger, E. (1998). *Communities of practice: Learning, meaning, and identity*. New York, NY: Cambridge University Press.
- Wu, D. & Hiltz, S.R. (2003). Online discussions and perceived learning. Paper presented at the *Ninth Americas Conference on Information Systems*, Tampa, FL. Retrieved August 28, 2004, from [http://www.alnresearch.org/Data\\_Files/articles/full\\_text/wu\\_Hiltz\(2003\).pdf](http://www.alnresearch.org/Data_Files/articles/full_text/wu_Hiltz(2003).pdf).
- Yildiz, S., & Bichelmeyer, B. A. (2003). Exploring electronic forum participation and interaction by EFL speakers in two web-based graduate-level courses. *Distance Education*, 24(2), 175-193.
- Yim, K. (2005). *Second language speakers' participation in computer-mediated discussions in graduate seminars*. Unpublished doctoral dissertation, University of British Columbia, Vancouver BC, Canada.
- Yin, R. K. (1989). *Case study research: Design and methods* (2ed ed.). Thousand Oaks, CA: Sage Publications.

## APPENDIX A: CONSENT FORM—INSTRUCTORS

### Consent Form—Instructors

#### Instructor Presence in Online Programs

**Principal Investigator:**

Dr. Stephen Carey, PhD  
Associate Professor  
Department of Language and Literacy Education  
University of British Columbia  
[REDACTED]

**Co-Investigator(s):**

Tannis Morgan, PhD Student  
Department of Language and Literacy Education  
University of British Columbia  
[REDACTED]

\*This research will contribute to a dissertation, and might lead to publications and conference presentations. A research report will be made available free of charge to consenting individuals.

**Purpose:**

The purpose of this study is to explore instructor presence in online teaching contexts, as it relates to online community. As an online instructor, your participation in this study will help us to have a better understanding of instructor experience in online teaching, in relation to the course design and the delivery context. You will also be contributing to a broader understanding of intercultural online teaching and learning contexts.

**Study Procedures:**

If you agree to participate in this study, the investigators are requesting your permission to do the following:

1. We would like permission to conduct analysis on your contributions to the discussion forum.
2. We would like to conduct an internet chat, email, or an in-person interview with you about your experience in online teaching, as it relates to course design, delivery, and the development of online community. This interview would require no more than 60 minutes of your time, and would not take place until your teaching contract was completed.

3. We would like permission to use the results of your Teaching Perspective Inventory (TPI) to inform our analysis on instructor presence.

\*If you do not agree to participate in this study, your activities in online teaching will not be included in the research.

**Confidentiality:**

Any information about your identity will be kept strictly confidential. All paper documents will be identified only by code number and kept in a locked filing cabinet for a period of 5 years, and will then be destroyed. All digital information will be kept on a password-protected server, and on CDRoms, and will be destroyed 5 years after the completion of the study. All names (of participants, co-workers, workplaces) will be changed (unless you request otherwise) in any reports of the completed study.

**Remuneration/Compensation:**

No remuneration will be provided for participation in this project.

**Contact for information about the study:**

If you have any questions or desire further information with respect to this study, you may contact Dr. Stephen Carey or one of his associates at [REDACTED].

**Contact for concerns about the rights of research subjects:**

If you have any concerns about your treatment or rights as a research subject, you may contact the Research Subject Information Line in the UBC Office of Research Services at [REDACTED] 8598.

**Consent:**

Your participation in this study is entirely voluntary and you may refuse to participate or withdraw from the study at any time without jeopardy to access to further services from the Online Academy or DET/UBC.

Your signature below indicates that you have received a copy of this consent form for your own records.

Your signature indicates that you consent to participate in this study.

\_\_\_\_\_  
Subject Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Name

## APPENDIX B: INTERVIEW QUESTION GUIDE

1. How do you describe your role when you are an online instructor? Would you call yourself a facilitator, teacher, instructor, professor? How would you identify yourself and why would you label yourself that way?
2. How would you describe your facilitation style or what you were doing in the course that you were teaching? What you were trying to do in this experience? What do you think your interactions were mainly about?
3. What influences how you facilitate? What is guiding you in the on-line teaching part of it?
4. When you look online discussions or the online space, do you view that as a community, a class, a collaboration, etc?
5. What strategies do you use as a facilitator to create online community?
6. How did you conceptualize the students, the context? What role did language have?
7. What influenced how much you posted, the kinds of things you posted? What kinds of decisions are you making when you post?
8. How do you think that your facilitation evolved as the course went on and how do you think that the students' participation evolved as the course went on?
9. What do you find most challenging about online teaching and what do you find most rewarding?

## APPENDIX C: STUDENT QUESTIONNAIRE—CASE WILLIAM

### QUESTIONNAIRE EDTC 505 ONLINE

#### Instructions

I suggest that you indicate your answer by changing the **colour** of the font to indicate your selection, by using the highlighting tool, or by simply typing your response beside the question.

This questionnaire is not being used to evaluate you in this course.

Let me know if you have any questions or problems!

#### A. BACKGROUND INFORMATION

1. Have you ever taken an online course or a course where a component of it was online? a) Online *Yes/no* b) mixed mode *Yes/No*
2. How many have you completed? a) Online \_\_\_ b) mixed mode \_\_\_\_
3. This course was offered in both online and mixed mode format. What made you choose this format?

- 
4. How do you rate your ability in the following English language skills:

Academic writing	1	2	3	4	5	6	7
	Novice					Expert	
Speaking	1	2	3	4	5	6	7
	Novice					Expert	
Listening	1	2	3	4	5	6	7
	Novice					Expert	

<b>Reading</b>	1	2	3	4	5	6	7
	Novice				Expert		

5. What was your access to technology for this course? In other words, where did you use the computer for the online participation part of this course?

---

6. How do you rate your ability with the technical requirements of the course (keyboarding, using the discussion forum, WebCT environment).

	1	2	3	4	5	6	7
	Novice				Expert		

## B. PARTICIPATION

1. With (1) meaning you *never* contributed to discussions, and (7) meaning you contributed *very frequently*, how do you rate the frequency of your participation in this class?

<b>Face-to-face</b>	1	2	3	4	5	6	7
	Never						very frequently

<b>Online</b>	1	2	3	4	5	6	7
	Never						very frequently

2. How do you rate the quality of your participation in this class, with (1) meaning your contributions were *irrelevant and unimportant* and (7) meaning your contributions were *highly relevant and important*?

<b>Face-to-face</b>	1	2	3	4	5	6	7
	irrelevant						highly relevant

<b>Online</b>	1	2	3	4	5	6	7
	irrelevant						highly relevant

**7. Compared to other classes you've been in, how do you compare your participation?**

*Circle one.*

1. I participated less in this class than in my other classes
2. I participated about the same as in my other classes
3. I participated more in this class than in other classes

**C. LEARNING**

**1. How do you rank the following in relation to your own personal experience:**

- a. The use of online bulletin board in this course was important and beneficial for social interaction.**

1            2            3            4            5            6            7

strongly disagree

strongly agree

- b. The use of the online bulletin board in this course was important and beneficial for my learning.**

1            2            3            4            5            6            7

strongly disagree

strongly agree

- c. I feel I could have learned more if this course had been totally online.**

1            2            3            4            5            6            7

strongly disagree

strongly agree

- d. I feel I could have learned more if this course had been totally face-to-face.**

1            2            3            4            5            6            7

strongly disagree

strongly agree

**D. COMMUNITY**

- [illegible]

- 1          2          3          4          5          6          7
- strongly disagree
- strongly agree

- 1      2      3      4      5      6      7
- strongly disagree      strongly agree

- 1      2      3      4      5      6      7
- strongly disagree      strongly agree

- 1      2      3      4      5      6      7
- strongly disagree                          strongly agree

[illegible]



- 2. The instructor had an important role in building a sense of community in this course.**

1	2	3	4	5	6	7
strongly disagree			strongly agree			

- 3. I felt the structure of this course was student centred.**

1	2	3	4	5	6	7
strongly disagree			strongly agree			

- 4. I felt the online discussions were student controlled.**

1	2	3	4	5	6	7
strongly disagree			strongly agree			

- 5. I felt the instructor's online contributions were important and relevant.**

1	2	3	4	5	6	7
strongly disagree			strongly agree			

## APPENDIX D: FORMATIVE EVALUATION ONLINE ACADEMY PROGRAM

### Question 1

How would you rate the overall quality of the materials as presented in WebCT?

- a. Excellent
- b. Good
- c. Adequate
- d. Less than Adequate
- e. Poor

### Question 2

The online discussions played an important role in helping me with the material and concepts in Module 1?

- a. Excellent
- b. Good
- c. Adequate
- d. Less than Adequate
- e. Poor

### Question 3

The instructors effectively facilitated my learning in the module.

- a. Excellent
- b. Good
- c. Adequate
- d. Less than Adequate
- e. Poor

### Question 4

The ideas and activities in Module 1 challenged me intellectually: I was asked to think more critically about issues and concepts than I have before concerning e-learning.

- a. Excellent

- b. Good
- c. Adequate
- d. Less than Adequate
- e. Poor

**Question 5**

Please provide any additional comments you have on your learning experience in Module 1 in the text field below.

## APPENDIX E: E-LEARNING TUTORING SYNOPSIS OF COURSE TOPICS

Bridge/Orientation (1 day face-to-face workshop)

Module 4: Planning Courses (4 weeks)

Unit 1: E-Learning Environments/Contexts and Instructional Design

Unit 2: Learning Objectives

Unit 3: Developing and Critiquing Concept Maps

Module 5: Instructional Strategies, Methodologies and Techniques (6 weeks)

Unit 1: What are Instructional Strategies?

Unit 2: Didactic or Instructor-Centred Strategies

Unit 3: Collaborative Learning

Unit 4: Self-Directed Learning and Situated Learning

Unit 5: Practices for Online Discussion

Unit 6: Developing your Strategies

Module 6: Assessment (3 weeks)

Unit 1: Principles of Assessment

Unit 2: Summative Assessment in E-Learning Environments

Unit 3: Formative Assessment in E-Learning Environments

Module 7: Academic Support (3 weeks)

Unit 1: Communication Networks

Unit 2: Technical and Administrative Support

Unit 3: Library and Academic Advising

## APPENDIX F: ETHICS APPROVAL CERTIFICATE



The University of British Columbia  
Office of Research Services and Administration  
**Behavioural Research Ethics Board**

### ***Certificate of Approval***

<small>PRINCIPAL INVESTIGATOR</small> Carey, S.	<small>DEPARTMENT</small> Language and Literacy Educ	<small>NUMBER</small> <b>B05-0659</b>
<small>INSTITUTION(S) WHERE RESEARCH WILL BE CARRIED OUT</small> UBC Campus ,		
<small>CO-INVESTIGATORS:</small> Belfer, Karen, ; Morgan, Tannis Luise, Educational Studies		
<small>SPONSORING AGENCIES</small>		
<small>TITLE:</small> Instructor Presence and Social Presence in an Intercultural Online Program		
<small>APPROVAL DATE</small> <b>SEP 30 2005</b>	<small>TERM (YEARS)</small> 1	<small>DOCUMENTS INCLUDED IN THIS APPROVAL:</small> May 3, 2005, Consent form / June 9, 2005, Contact letter / Questionnaires
<small>CERTIFICATION:</small>  <p style="text-align: center;">The protocol describing the above-named project has been reviewed by the Committee and the experimental procedures were found to be acceptable on ethical grounds for research involving human subjects.</p> <div style="text-align: center; margin-top: 20px;"> </div> <p style="text-align: center;"><i>Approval of the Behavioural Research Ethics Board by one of the following:</i>                  Dr. Peter Suedfeld, Chair,                  Dr. Susan Rowley, Associate Chair</p>		
<p style="text-align: center;">This Certificate of Approval is valid for the above term provided there is no change in the experimental procedures</p>		