



The perceived roles and competencies for distance educators employed by a private higher education institution

by
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Table of Contents

Table of Contents	ii
Declaration	vii
Abstract	viii
Abstrak	ix
Acknowledgements.....	x
List of tables	xi
List of figures	xii
CHAPTER 1	1
ORIENTATION TO THE STUDY	1
1.1 Introduction.....	1
1.2 Background to the study	1
1.3 Statement of the problem	6
1.3.1 Research objective	7
1.3.2 Research design.....	8
1.4 Ethical considerations.....	8
1.5 Structure of the thesis.....	8
1.6 Conclusion.....	8
CHAPTER 2	10
LITERATURE PERSPECTIVES AND CONTEXTUALISATION	10

2.1	Introduction.....	10
2.2	Distance education.....	10
2.2.1	Definition of distance education	10
2.2.2	Distance education delivery modes	12
2.2.3	Online learning as a delivery mode of distance education.....	13
2.2.4	Distance education viewed as a system	14
2.2.5	Distance education as part of global Higher Education	16
2.2.6	Distance education in South Africa	17
2.2.7	Distance education advantages and drawbacks.....	18
2.3	The institutional context: College A	19
2.4	Roles and competencies of educators in a distance education context.....	21
2.5	Chosen roles in the context of College A.....	27
2.6	The impact of COVID-19 on technology use in higher education	34
2.7	Conclusion.....	35
	CHAPTER 3	36
	RESEARCH METHODOLOGY	36
3.1	Introduction.....	36
3.2	Research paradigm	36
3.3	Research design	37
3.4	Research method.....	38
3.4.1	Data collection method	38

3.4.2	Target population	39
3.4.3	Pretesting of the questionnaire	40
3.5	Data preparation.....	40
3.5.1	Editing	40
3.5.2	Data capturing	41
3.6	Data analysis and interpretation	41
3.6.1	Descriptive statistical analysis.....	41
3.6.2	Analysis of open-ended questions.....	42
3.7	Ethical considerations.....	42
3.8	Reliability and validity	42
3.9	Conclusion.....	43
CHAPTER 4		44
DATA ANALYSIS AND INTERPRETATION		44
4.1	Introduction.....	44
4.2	Questionnaire results.....	44
4.2.1	Experience results	44
4.2.1.1	Lecturing tenure	44
4.2.1.2	Lecturing tenure in distance education.....	45
4.2.2	The perceived importance and competency of the roles of private distance education educators.....	46
4.2.2.1	Overview of findings: Roles and competencies of private distance education educators.....	47

4.2.2.2	Analysis of the individual roles and corresponding competencies of private distance education educators	52
4.2.2.3	Gap analysis between perceived importance and competency of roles.....	58
4.3	Conclusion.....	60
CHAPTER 5		61
CONCLUSIONS AND POSSIBLE IMPLICATIONS		61
5.1	Introduction.....	61
5.2	Discussion of main research findings	61
5.2.1	Perceptions of private distance education educators regarding the importance of their roles	61
5.2.2	Perceptions of private distance education educators regarding their competencies.....	62
5.2.3	Perceived challenging roles	62
5.2.4	Perceived importance versus perceived competency	63
5.3	Limitations	63
5.3.1	The limited scope of the study	63
5.3.2	Data collection instrument.....	64
5.4	Contribution	64
5.5	Recommendations for future research	65
5.5.1	Perceptions.....	65
5.6	Conclusion.....	65
References		67

Annexure A.....	77
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Declaration

By submitting this thesis electronically, I declare that the entirety of the work contained therein is my own, original work, that I am the sole author thereof (save to the extent explicitly otherwise stated), that reproduction and publication thereof by Stellenbosch University will not infringe any third party rights and that I have not previously in its entirety or in part submitted it for obtaining any qualification.

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Abstract

Distance education educators need to fulfil new roles and competencies as traditional teaching techniques cannot simply be transferred to the distance education environment. Educators need assistance in clarifying their new roles in order to address the challenges brought about by the differences between traditional learning environments and distance education. Numerous studies have been conducted on roles and competencies in distance education in the USA, Canada, Australia and India. In the South African context, such studies have been situated within the context of one public mega open distance learning university, namely the University of South Africa. To date, research regarding the roles of educators in private higher education institutions is limited. Therefore, the focus of this study was an attempt to fill the gap in the literature regarding the roles and competencies of private distance educators. The results will form the basis for the future development of a framework for academic staff development in private distance higher education. The study employed a survey design using a quantitative web-based questionnaire to gather data on the perceived roles and competencies of distance educators employed by a private higher education institution. The respondents were firstly required to indicate their perceived importance of the eight roles according to the Online Instructor Roles and Competencies which was developed by Martin et al. 2021, and, secondly, their perceived competency in each role. The study indicated that private distance education educators perceived all eight role categories as important and viewed their role competency in the following descending order: subject matter expert, course designer and developer, assessor/evaluator, advisor/mentor, course facilitator, technology expert, course manager, and lifelong learner. The respondents found the roles of advisor/mentor and course facilitator the most challenging. Respondents perceived the role of advisor or mentor as challenging mainly because advisors and mentors struggled to encourage students to engage with the resources and announcements on the Learning Management System. The findings in the study will be utilised to develop an induction programme covering the eight academic roles and addressing the challenges faced by distance educators who work online.

Abstrak

Afstandsonderrigopvoeders moet nuwe rolle en bevoegdhede vervul aangesien tradisionele onderrigtegnieke eenvoudig nie na die afstandsonderrigomgewing oorgedra kan word nie. Opvoeders het hulp nodig om hul nuwe rolle uit te klaar om die uitdagings aan te spreek wat veroorsaak word deur die verskille tussen tradisionele leeromgewings en afstandsonderrig. Talle studies is gedoen oor rolle en bevoegdhede in afstandsonderrig in die VSA, Kanada, Australië en Indië. In die Suid-Afrikaanse konteks is studies binne die konteks van een openbare mega-oop afstandsonderrig-universiteit geleë, naamlik die Universiteit van Suid-Afrika. Tot op hede is navorsing oor die rolle van opvoeders in private hoërondewysinstellings beperk. Daarom was die fokus van hierdie studie 'n poging om die leemte in die literatuur aan te vul ten opsigte van die rolle en bevoegdhede van privaat afstandopvoeders. Die resultate sal die basis vorm vir die toekomstige ontwikkeling van 'n raamwerk vir akademiese personeelontwikkeling in privaat afstandhoërondewys. Die studie het 'n opname-ontwerp gebruik deur middel van 'n kwantitatiewe webgebaseerde vraelys om data oor die persepsie van afstandsondewysers se rolle en bevoegdhede in diens van 'n privaat hoërondewysinstelling in te samel. Daar was eerstens van die respondente verwag om hul persepsie aangaande die langriktheid van die agt rolle aan te dui volgens die 'Online Instructor Roles and Competencies' wat ontwikkel was deur Martin et al. 2021, en, tweedens, hul persepsie aangaande hul eie bevoegdheid in elke rol aan te dui. Die studie het aangedui dat privaat afstandsonderrigopvoeders al agt rolkategorieë as belangrik beskou en hul rolbevoegdheid in die volgende dalende volgorde beskou: vakkundige, kursusontwerper en -ontwikkelaar, assessor/evalueerder, adviseur/mentor, kursusfasiliteerder, tegnologiedeskundige, kursusbestuurder, en lewenslangeleerder. Die respondente het die rolle van adviseur/mentor en kursusfasiliteerder as die mees uitdagende aangedui. Respondente het die rol van adviseur of mentor as uitdagend ervaar, hoofsaaklik omdat adviseurs en mentors gesukkel het om studente aan te moedig om betrokke te raak by die hulpbronne en aankondigings op die leerbestuurstelsel. Die bevindinge in die studie sal gebruik word om 'n induksieprogram te ontwikkel wat die agt akademiese rolle en uitdagings aanspreek wat afstandopvoeders wat aanlyn werk in die gesig staar.

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Ubuntu

'I am what I am because of who we all are.'

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List of tables

Table 2.1	Roles of online instructors	26
Table 3.1	A comparison of quantitative and qualitative research	37
Table 4.1	Descriptive statistics of roles and competencies of private distance education educators	48
Table 4.2	Descending order of perceived role importance	50
Table 4.3	Descending order of perceived role competency	51
Table 4.4	Descending order of challenging roles	52
Table 4.5	Gap analysis between importance vs competency	59

List of figures

Figure 1.1	The online teaching iceberg	2
Figure 2.1	Relation of course structure and instructor-student dialogue in transactional distance	12
Figure 2.2	The five generations of distance education	13
Figure 2.3	The teaching continuum	14
Figure 2.4	Distance education system	15
Figure 2.5	Higher education students in ODE	17
Figure 2.6	Theoretical structure to define university teacher roles and competencies in online learning environments	14
Figure 2.7	Online instructor roles	25
Figure 3.1	Reliability statistics	43
Figure 4.1	Percentage distribution of respondents' lecturing tenure (n=43)	45
Figure 4.2	Percentage of respondents' lecturing tenure in distance education (n=43)	46
Figure 4.3	Perceived challenging roles	52
Figure 4.4	Ranking of perceptions of the importance of roles vs. perceived competency	59

CHAPTER 1

ORIENTATION TO THE STUDY

1.1 Introduction

This first chapter commences with the background of the study, followed by a brief outline of the research design, which is discussed in further detail in Chapter 3. The ethical considerations of the study are also highlighted before a summary of the thesis structure concludes the chapter.

1.2 Background of the study

The South African Department of Higher Education and Training (DHET) published two papers with reference to the impact on the education and training provision of HE in South Africa: The White Paper for Post-School Education and Training (DHET, 2013) and the Policy for the Provision of Distance Education in South African Universities in the Context of an Integrated Post-school System (DHET, 2014). According to these papers, South African universities could expect to enrol approximately 1.6 million students by 2030. They also reflect the government's admission that traditional campus-based universities would be unable to accommodate such numbers. To help realise the ideal of accommodating these numbers, firstly, blended and distance learning must play a larger role in the future, and secondly, private higher education institutions (PHEIs) are necessary to fill the void in the higher education (HE) landscape.

An article discussing the postdigital future of online postgraduate education (Fawns, Aitken & Jones, 2021) featured a rough illustration titled “*The online teaching iceberg*” (Figure 1.1). Tim Fawns later posted the illustration on Twitter intending to highlight the hidden work of online teaching to the general public. The Twitter post received thousands of likes and was retweeted with comments from educators making their frustration clear regarding the lack of recognition of their online teaching efforts.

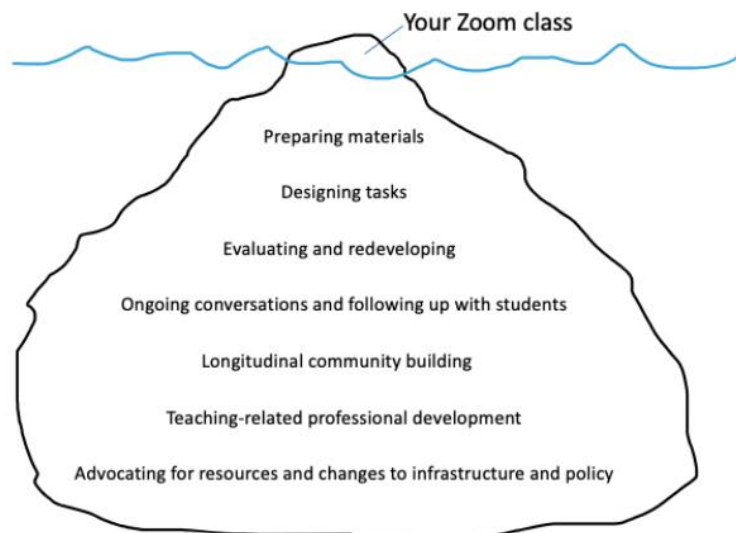


Figure 1.1 The online teaching iceberg
Source: Fawns, 2021

The illustration of Fawns visualises my iceberg experience managing a team of online educators at a PHEI in South Africa. This research was an effort to uncover the 'emerged iceberg' to establish the roles and competencies required for an online distance educator at a PHEI in order to develop an induction course for new educators.

Academic work in HE typically comprises three distinct roles: teaching, research, and service (Fowler, 2017). The balance between the roles differs from institution to institution. However, as a norm, academics are expected to be researchers, conduct a high standard of teaching and engage in a range of service activities. Furthermore, Frick and Kapp (2009) state that academic staff as professionals require both discipline-specific and education expertise. Traditionally, university lecturers have undergone little or no formal preparation for their role as teachers and are therefore often ill-prepared for it (Kane, Sandretto & Heath, 2004). Saunders (1999) state that many lecturers are appointed with Masters and Doctorates without participating in any sustained staff development programme. Ferman (2002) supports this viewpoint by mentioning that most university lecturers are not trained teachers, resulting in a lack of knowledge regarding pedagogy. In many literary studies, the feeling of isolation and bewilderment that new academics feel when entering the world of academics are mentioned (Quinn & Vorster, 2004; Jawitz & Perez, 2016; Johnson, 2016). I experienced this personally, witnessing my colleagues struggle to conceptualise their

new role as distance educators. This is even more evident in distance education (DE) where educators are isolated in front of a computer screen with limited interaction with their colleagues. It is also evident in the literature that different pedagogical techniques are needed for teaching in online learning settings than face-to-face learning environments (Baran & Correia, 2014).

This study focused on the *perceived roles and competencies of online distance educators* employed by a *private higher education institution*. The chosen institution for this study will be referred to as *College A* to adhere to the institution's request to remain anonymous. It is important to provide clarity regarding the terms 'private higher education institution', 'online distance learning', 'roles and competencies' and educators' own 'perceptions' of their role.

Private Higher Education Institution (PHEI)

Levy stated in 2003 that private higher education (PHE) in South Africa is a relatively small, yet diverse sector. This still rings true, with only 208,978 students (16% of the student population) enrolled at PHEIs in South Africa in 2019 (Engelbrecht, 2022). However, the demand for PHE qualifications increases year on year, with approximately 131 private and 26 public higher education institutions in the South African higher education landscape (DHET, 2021).

It is challenging to differentiate between private and public higher education due to different meanings depending on the context in which they are discussed (Tamrat, 2018). The three most common criteria used are: 1) legal ownership (nonstate or state ownership), 2) contribution to society (private returns versus public goods) and 3) main source of funding (student tuition versus government subsidies) (Buncker, 2017). For the context of this study, funding plays a vital part as PHEIs do not receive any funding from the state, even when governed by the same policies as their public counterparts (Mabizela, 2002). Therefore, PHEIs are bound to practice sound business practices to survive long term (Bezuidenhout & De Jager, 2014). Another major difference is that PHEIs (including College A in this study), often function with a limited number of full-time educators (Varghese, 2004) who are usually industry/module experts without sound pedagogical knowledge (Stander & Herman, 2017; Cronje & Bitzer, 2019). In

the literature, the terms sessional, casual or part-time are used interchangeably to refer to this cohort of staff. According to Luck, Chugh, Turnbull & Pember (2022:1155) sessional academic staff can be defined as academic staff “employed on temporary contracts and ...remunerated [solely] for the hours worked”. Sessional educators characteristically are not remunerated for non-teaching activities like attending meetings and committees. Therefore, attending workshops and professional development activities can be more challenging for sessional academic staff than for permanent academic staff. Many sessional educators also feel isolated due to their limited interaction with full-time educators. Sessional academic staff are often viewed as the ‘invisible’ cohort of part-time or sessional educators (Luck et al., 2022). The lack of government funding also influences the research efforts of PHEIs. At the time of this study, College A did not expect part-time educators to conduct research; their main task was teaching online on an hourly basis.

Online distance education

DE is a term used to describe teaching and learning when the educator and student are physically separated in terms of time and place. Moreso, transactional distance also exists, which includes a communication and psychological gap (Roberts, 2019). Online learning is a mode of delivery in DE, including a wide range of teaching approaches (Bates, 2016).

Online DE plays a significant role in HE provisioning by offering widened and more flexible access, while enabling successful participation in HE, especially in the South African context (DHET, 2014). The drawbacks of online DE however include infrastructure and limited bandwidth, political and cultural factors, student access to devices, a lack of commitment to open content, fostering a commitment to new learning models and developing staff capacity (Bajinath & Butcher, 2015). These issues will be discussed in more detail in Chapter 2.

This study focused on the distance campus of College A, offering courses intentionally designed in advance for an online mode of delivery. The educators work remotely and conduct their classes through a learning management system (LMS). Students and educators are not physically present in a classroom. College A, therefore, offers DE with the mode of delivery as online learning.

Roles and competencies

Authors agree that educators perform many complex roles, influencing the quality of their teaching (MacPhail, Ulvik, Guberman, Czerniawski, Oolbekkink-Marchand & Bail, 2019). Van Schalkwyk, Cilliers, Adendorff, Cattell and Herman (2013:140) mention that quality teaching in HE typically describes an educator as one with “strong interpersonal relationships, advanced presentation skills, expert subject knowledge, a dynamic personality and the ability to mediate the so-called teaching/research nexus.”

DE (including all its different modes of delivery) requires a new skill set from educators (Besser & Bonn, 1997; Grammens, Voet, Vanderlinde, Declercq & De Wever, 2022; Khodabandelou, Chaharbashloo, Ghaderi, Zeinabadi & Karimi, 2021). The literature clearly indicates that traditional teaching techniques cannot simply be transferred to the DE environment (Thach & Murphy, 1995, Briggs, 2005, Roberts, 2018). Jensen, Price and Roxa conducted a study in 2020 interviewing 15 teachers at six institutions in Sweden on how they perceive the differences between teaching online and on campus. The study indicated two main themes: the changing nature of the digital context (technology development & learning platforms) and student-teacher interaction (group communication, class size, and time invested in teaching the course).

Grammens et al. (2022) and Khodabandelou et al. (2022) researched the online roles and competencies in online teaching using a systematic literature review. While both studies include the research of Martin, Kumar and She (2021) and the Online Instructor Roles and Competencies (OIRC) instrument (which I use in my study), none of the studies applied to the South African context. Research relating to online education on the PHEIs landscape is also limited, and I was unable to find any evidence of research regarding the roles and competencies of online distance educators employed by a PHEIs in South Africa. Stander and Herman (2017) mentioned that their study of PHEIs in South Africa revealed that most participants had unclear roles and duties, with one individual often assuming multiple roles.

Educators' own role perception

In my personal experience, academic managers often assume what the educators' roles and corresponding competencies are, and then provide training according to their assumptions and not the training needs of the educators. Gaining insight into how online educators perceive their roles and level of competence was crucial to me. Understanding their perspectives can shed light on how we can better support and aid their development. My approach is supported by Webster-Wright (2009:703), who stated that academic, professional learning activities should "preferably be identified and initiated by academic staff themselves" and not based on the development and training that suits the institution. Khodabandelou et al. (2022:11) also concluded after studying forty-three articles over 11 years of research (2010–2020) on university instructors' roles and competencies in online teaching environments, that it is clear from the results that "little attention has been paid to the instructor's reflection and voice in the literature".

In the South African context, the research by Roberts (2017) addresses the above statement by investigating the *perceptions* of the teaching and research staff at the University of South Africa (Unisa) regarding the current and future roles of distance educators, their competencies in each role and training that they require in order to address competencies required in these future roles. My study will add to this body of knowledge by exploring the perceived roles and competencies of distance educators from the PHEI context and considering the contextual differences between private and public HE institutions.

1.3 Statement of the problem

Briggs (2005) mentions that clarity in roles and the development of an appropriate competency framework are critical for distance educators' performance. The CHE (2004) supports this viewpoint by mentioning that because of the distance factor, it is even more important to clarify "clear role descriptions, expectations, and reporting lines" to enhance the competency of distance educators. Briggs (2005) further suggests that role clarification aids the development of competency frameworks for understanding and addressing the academic and professional development that is

unique to DE. Accordingly, the roles of educators in DE are the main focus of this study.

Numerous studies have been conducted on roles and competencies in DE in the USA, Canada, Australia and India (Roberts, 2018). In South Africa, similar studies by Bezuidenhout (2015), Roberts and Bezuidenhout (2017) and Roberts (2018) are situated within the context of a public mega open distance learning university, namely Unisa. To date, research regarding the roles and competencies of educators in PHEIs is limited. The differences (funding, contribution to society, legal ownership, and the large percentage of contract staff) between private and public higher education institutions necessitate research to investigate the perceived roles and competencies required of online distance educators in PHEIs.

Based on the above, the aim of this study was to fill the gap in the literature regarding the roles and competencies of *private* online distance educators because of the unique contextual differences of public distance higher education.

1.3.1 Research objective

The main research question of the proposed study was:

What are the perceived roles and competencies required of online distance educators in private higher education institutions?’

To answer the main research question, two sub-questions were posed.

1. *How important do the educators perceive the given roles and competencies as online distance educators in private higher education?*
2. *How competent do the educators perceive themselves to be in the given roles and competencies as distance educators?*

The researcher used the Online Instructor Roles and Competencies (OIRC) instrument (Martin et al., 2021), which includes the following roles: Subject Matter Expert, Course Designer and Developer, Course Facilitator, Course Manager, Advisor/Mentor, Assessor/Evaluator, Technology Expert, and Lifelong Learner.

The information will form the basis for developing a framework for academic staff

development in private distance higher education.

1.3.2 Research design

The study employed a survey design (as shown in Annexure A) using a quantitative web-based questionnaire that I, as the researcher, compiled and administered using a platform called SunSurveys. The target population for this study consisted of all the DE educators (N=96) employed by the chosen PHEI. Descriptive statistics were used to analyse the quantitative data, and thematic analysis was used to analyse the responses to the three open-ended questions to obtain opinions and recommendations. The interpretations of the findings were substantiated by referring to previous studies. Chapter 3 provides a more in-depth discussion of the research design of this study.

1.4 Ethical considerations

The web-based survey was completed within the Stellenbosch University research policy guidelines. The proposed study received ethical clearance from the Stellenbosch University Research Ethics Committee. Ethical clearance and institutional permission were also received from the PHEI where the participants were based. Participation was voluntary and anonymous, and the participants were requested to give consent. Chapter 3 gives further details of this ethics process.

1.5 Structure of the thesis

The thesis is structured as follows:

Chapter 1: Orientation to the study

Chapter 2: Literature perspectives and contextualisation

Chapter 3: Research methodology

Chapter 4: Data analysis and interpretation

Chapter 5: Conclusion and possible implications

1.6 Conclusion

This first chapter discussed the background of the study and provided a brief outline of the research design. The terms of the main research problem, namely, to establish the

perceived roles and competencies of online distance educators in PHEIs were clarified. The chosen institution for the research was explained before the research design was briefly outlined. The ethical considerations of the study were explained, and finally, the layout of this thesis was presented.

CHAPTER 2

LITERATURE PERSPECTIVES AND CONTEXTUALISATION

2.1 Introduction

In this chapter, the first section explores the literature on DE, firstly to define the concept within the context of HE in South Africa, and secondly to show how DE functions as a system. The second section focuses on the context of the chosen institution for this study before the roles and competencies of online distance educators are outlined by providing an overview of previous studies in this field and introducing the selected roles and competencies for this study. Lastly, the impact of COVID-19 on the use of technology in HE is highlighted.

2.2 Distance education

This section will first define DE and subsequently explain online learning as a method of DE delivery.

2.2.1 Definition of distance education

Glennie (2007) suggests that DE provides access to a large and diverse student population, both school leavers and mature students, whose educational needs might otherwise go unmet. A classic example in literature is the story of Margaret Fitzsimons, a 17-year-old farm girl who dreamt of working in an office. At the time (1939), her local school offered cooking and sewing classes only, and to fulfil her dream, she enrolled in a Pitman shorthand course through a London-based correspondence school. Margaret conducted her examinations at home and sent her results to London for marking. She passed her examinations and after emigrating to the USA, went to work as a secretary in the Massachusetts State House (Burns, 2011). In South Africa, Unisa began offering correspondence courses in 1946, and by 1970, 22 000 students were being instructed by more than 400 full-time academic personnel via six million packages sent annually (Moore, 2022). The former South African President, Nelson Mandela, obtained his BA degree and later his LLB degree through Unisa while in prison (Unisa, 2018).

Today, decades later, distance learning plays a significant role in HE in South Africa.

Almost two decades ago, the Council on Higher Education (CHE) noted that the key motivating factor behind the use of DE is that it provides increasing access for students to HE (2004). However, distance learning is a complicated phenomenon associated with various purposes, terms, models, and theoretical concepts. Roberts (2019) mentions the many subtle differences and similarities between definitions in the DE field of study. In the following section, these various definitions will be unpacked before focusing on the selected purpose and definition of DE for this study.

In the literature, two critical concepts of DE are evident, namely time and place. According to Roberts (2019:2), DE refers to “teaching and learning that takes place where there is a physical and geographical separation between the teacher and the student in both time and place”. Likewise, Kentnor (2015) defines DE as a method of teaching where the student and teacher are physically separated. Johnson (2020:1) summarises this definition concisely by stating that in DE, “there is typically a gap of space and, often, time”.

It is important to recognise that in the context of DE, transactional distance also exists in addition to time and place gaps. When Moore first used the term ‘transactional distance’ in 1983, he included the time and place gap and the psychological and communicative gap between student and teacher (Roberts, 2019). According to Moore (2018), three factors, namely dialogue, learner autonomy and structure, should be considered when determining the nature of the transaction between students and teachers in DE (Falloon, 2011). Figure 2.1 depicts the relationship between the structure and instructor-student dialogue in transactional distance. The more structured a course, the less dialogue is needed, and vice versa; the more dialogue, the less structure is necessary for the course. The third factor, learner autonomy, refers to the degree to which, in a teaching/learning relationship, the student rather than the teacher sets the objectives of the course, the learning experiences, and evaluation choices. The level of autonomy required of the student increases as transactional distance increases (Moore, 2018).

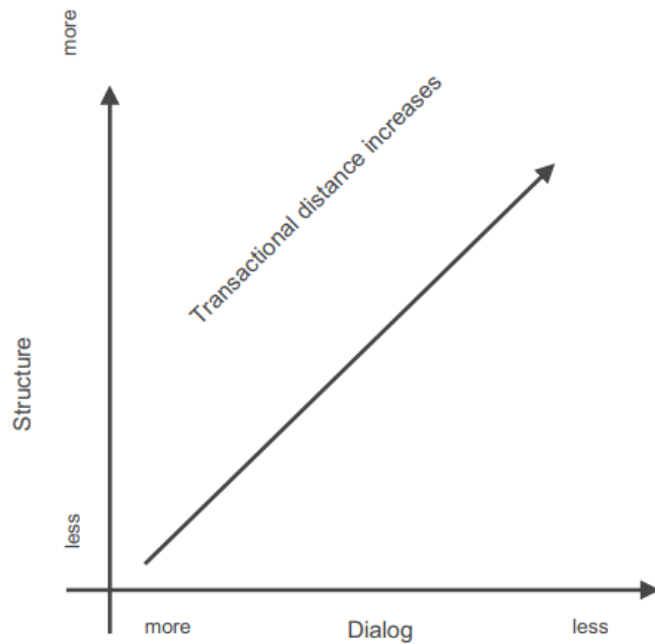


Figure 2.1: Relation of course structure and instructor-student dialogue in transactional distance

Source: Moore (2018)

It is therefore clear that DE can be viewed as “an educational process whereby the learner and the teacher are separated not only geographically but also cognitively” (Roberts, 2019:3).

2.2.2 Distance education delivery modes

As previously mentioned, the first DE institution in South Africa, Unisa, mailed 22 000 students six million packages annually. As shown in Figure 2.2, it produced the first generation of DE via correspondence. Over the years, the mode of delivery changed to fully online learning. Anderson (2022:20) also states that “distance learning has mirrored technological progress from paper, to printing to digital communication”.

First Generation	The Correspondence Model Single print medium
Second Generation	Radio and television broadcasting
Third Generation	Combination: Correspondence assisted by broadcasting
Fourth Generation	Tele-learning, interactive audio and video conferencing

Fifth Generation	Online delivery
------------------	-----------------

Figure 2.2: The five generations of distance education
Source: Taylor (2001)

However, all the generations of delivery are in use today and can be combined by courses and institutions (Roberts, 2019). DE evolved through the generations by adapting and incorporating the technologies of the time.

Online learning is, therefore, a mode of delivery in DE, not to be confused with the terms ‘blended learning’ or ‘hybrid learning’. These concepts will be explained in more detail in the following section.

2.2.3 Online learning as a delivery mode of distance education

In this section I will first define online learning before discussing the continuum of online learning.

Online learning presents itself in various forms and is defined differently across HEIs. Singh and Thurman (2019) conducted a systematic literature review and content analysis covering a 30-year period (1988-2018) to examine the different definitions of online learning. The study discovered forty-six definitions of online learning with 18 synonymous terms, which is indicative of why scholars and researchers experience a significant amount of confusion with the term “online learning”.

According to Bates (2016:5), online learning can be defined as “any form of learning conducted partly or wholly over the Internet”. Bates purposely used a very broad definition of online learning to include all the varieties on the continuum. Figure 2.3 provides a graphic illustration of the teaching continuum according to Bates (2016), showing face-to-face teaching without any use of technology at one end of the continuum.

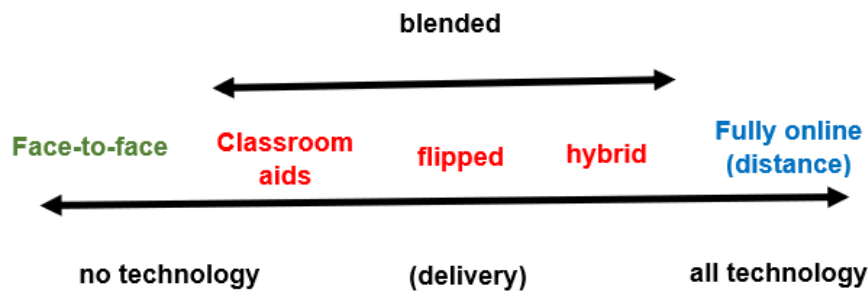


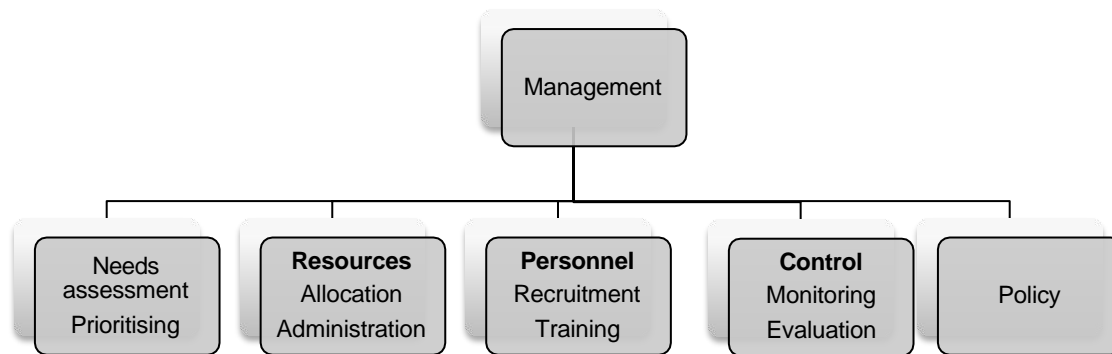
Figure 2.3: The teaching continuum
Source: Bates (2016)

The use of technology in the classroom, which may or may not involve online learning, is a further option referred to as blended learning. For instance, using PowerPoint presentations is not online learning, but directing learners to use their laptop or mobile phone during a lesson is a form of online learning. In this instance, classroom, or face-to-face learning, is however still the mode of delivery (Bates, 2016). Roberts (2019) remarks that blended learning in the context of DE can also be referred to as a delivery method that includes traditional correspondence combined with online learning. A flipped classroom suggests that learners complete pre-class preparation online (e.g., viewing a pre-recorded video lecture or reading online). Hybrid learning includes elements of face-to-face and online learning. Lastly, online learning takes place when learners study completely online.

Bates (2016) also contends that it is important to view online learning primarily as a mode of delivery and not a method of teaching. Online learning can include a wide range of teaching methods and can be seen as a mode of delivery for distance education.

2.2.4 Distance education viewed as a system

The concept of DE as a system is discussed at length in the literature. It is implied that DE requires a range of human and technical resources, and it is always best delivered within a system (Moore & Kearsley, 2012). Viewing DE from a system perspective provides a holistic approach with various interrelated components, as illustrated in Figure 2.4 below.



Content sources	Programme/course design	Delivery	Interaction	Learning environment
Organisation <ul style="list-style-type: none"> Individual Dual mode Single mode Consortia <p>Manages content experts</p> <p>Needs assessment</p> <p>Decides what to teach</p>	Course team <ul style="list-style-type: none"> Content specialist Instructional designer Graphic designer Web producer Audio/video producers Editor Evaluator Course team manager 	Media <ul style="list-style-type: none"> Text Images Sound Artefacts <p>Technology</p> <p>Recorded</p> <p>Broadcast</p> <p>Interactive</p>	<ul style="list-style-type: none"> Instructors Counsellors Administrative staff Libraries Help desk Learning centre/site coordinators Other students 	<ul style="list-style-type: none"> Workplace Home Classroom Learning centre Travelling

Figure 2.4: Distance education system

Source: Adapted from Moore and Kearsley (2012)

According to Moore and Kearsley (2012), the DE system includes the following key components:

- The content source, that provides students with information

- A subsystem for course design that organises activities and materials
- A media and technology subsystem to deliver the course to students
- Staff and tutors that support students
- Students in various settings
- A management subsystem responsible for organising policies, requirements assessment, and resource allocation, as well as evaluating outcomes and coordinating other subsystems.

The interrelated key components are an important aspect of this research as the roles of educators are determined by the degree to which each component functions in a particular institution. The distance campus of the institution in this research study is similar to the DE system described by Moore and Kearsley (2012) because all the essential components mentioned earlier are applicable.

It is beyond the scope of this study to discuss this model in further detail, but it is vital to acknowledge the role of educators as a component within the DE system.

2.2.5 Distance education as part of global Higher Education

Zawacki-Richter and Qayyum (2019) have found a growing demand for online DE driven by the desire for increased flexibility among traditional HE students and the need for adult learners seeking to further their education. When considering the growth of DE, it is important to view it in the context of the overall increase in demand for HE on a global scale. In 1992, there were only five countries where more than half of the student-aged population was attending universities, while in 2012, this number increased to 54 countries, excluding adult learners (Zawacki-Richter & Qayyum, 2019). As mentioned in section 2.2.1, DE can meet the demand for HE with reduced physical infrastructure and less cost. DE is becoming more popular as an alternative to traditional classroom learning due to the overall growth in HE. As seen in Figure 2.5, HE in many countries includes a significant number of students enrolled in open, online and distance education courses (ODE).

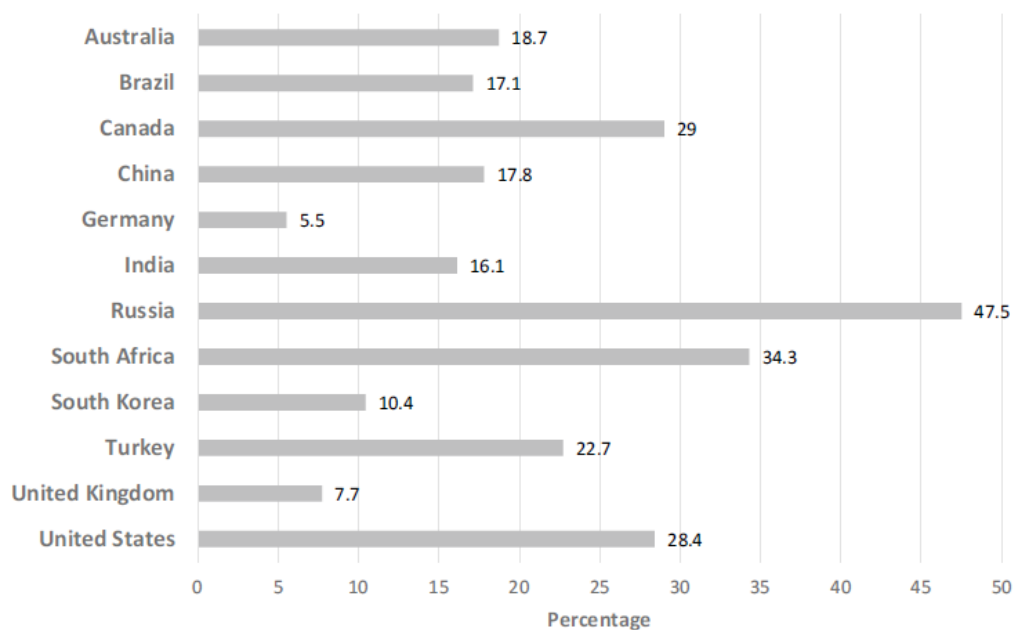


Figure 2.5: Higher education students in ODE (Zawacki-Richter & Qayyum, 2019).

Based on the above figures ODE is becoming more prevalent in HE across most countries. In Australia, Brazil, Canada, China, India, Russia, South Africa, Turkey, and the United States, over 20% of higher education students are enrolled in ODE courses and programs (Zawacki-Richter & Qayyum, 2019).

2.2.6 Distance education in South African

In South Africa, universities faced major disruptions in 2015 and 2016 as students protested against the ongoing rise in tuition fees and demanded free access to HE. The government argued that providing such services during the current economic downturn is not financially feasible. In this context, South Africa needs to explore ways to enhance the cost-effectiveness of university education (Prinsloo, 2019). Glennie and Mays (2019) suggest that the main focus of DE in South African universities is to broaden access. Enrolment rates at Unisa, the largest provider of distance education in the country, have shown a consistent increase throughout the past decade, except for a dip in 2014, whilst The University of Cape Town, which consistently ranks as the top university in all of Africa, has been providing online distance education since 2014 (Zawacki-Richter & Qayyum, 2019). It is worth noting that transitioning from correspondence to online distance education can be quite challenging for traditional distance teaching universities. According to Kok, Bester, and Esterhuizen (2018),

shifting from correspondence education to online learning is a significant challenge, particularly in a developing nation where access to reliable power and affordable internet is not guaranteed in both urban and rural areas. The "Policy for the Provision of Distance Education in South African Universities in the Context of an Integrated Post-School System" (DHET, 2014) highlights DE's distinctive role and significance. According to Prinsloo (2019), taking into consideration the DHET (2014) input, the unique contribution and purpose of DE are as follows:

- Increase flexible access to successful and meaningful participation in HE.
- Provide "low enrolment niche programmes that have a high impact and required by small numbers of students nationwide" (DHET, 2014:12).
- Provide students at HE contact institutions the option to complete one or two outstanding modules to complete their qualifications.
- Explore methods to acknowledge prior learning to enhance access and establish opportunities for alternative learning pathways into HE.

2.2.7 Distance education advantages and drawbacks

It is evident from the definition of DE that learning can occur at any time and place, allowing institutions to reach a wider geographical and diverse population of students (Kusmaryono, Jupriyanto & Kusumaningsih, 2021). DE can potentially solve the need for institutions to meet the increased demand for education whilst reducing costs (Valentine, 2002). DE offers the opportunity for lifelong learning (Fidalgo, Thormann, Kulyk & Lencastre, 2020) and enables students to access their institution from any location while saving time and money on transportation (Masalimova, Khvatova, Chikileva, Zvyagintseva, Stepanova & Melnik, 2022). Students can also easily access resources on the LMS, with the function to re-watch lessons, as noted by Masalimova et al., (2022). This feature is especially helpful for those who cannot attend classes at regular times, such as full-time working students. From a South African perspective, DE has two clear advantages. Firstly, DE does not require students to reside in a university residence. According to Prinsloo's (2019) research, data gathered from South Africa's student financial aid scheme reveals that only 40% of the necessary support for assisting a poor student pertains to tuition and books, while the remaining 60% is attributed to expenses associated with student housing. Secondly, the costs of programme design and resource development can be divided by larger student

numbers, achieving economies of scale (Prinsloo, 2019).

Although there are advantages to DE, there are also drawbacks that must be addressed. The drawbacks of DE can include some of the following issues: isolation from peers, struggle to stay motivated, lack of communication between educators and students, timely feedback, and technology access (Kusmaryono et al., 2021). In the South African context, issues impacting the move to fully online DE are, amongst others, infrastructure and limited bandwidth, political and cultural factors, student access to devices, a commitment to developing open content, fostering a commitment to new learning models and developing staff capacity (Baijnath & Butcher, 2015). This last DE drawback – developing staff capacity – is central to the motivation for this research study as the results (perceived roles and competencies required of online distance educators in private higher education institutions) will form the basis for developing a framework for academic staff development in private distance higher education. However, I am mindful that this is not the only issue and is only part of a myriad of issues, as mentioned in preceding section.

2.3 The institutional context: College A

PHEIs in the South African context play an important role in the HE landscape by expanding student access (Tamrat, 2017). Carpenter and Kraus (2020) agree that PHEIs are addressing the demand, providing opportunities for students who cannot study in the public HE sector. PHEIs are also commended for providing demand-driven programmes and increasing graduate employability (Dirkse van Schalkwyk et al., 2021).

As mentioned in Chapter 1, the most common criteria used to differentiate between public and private HE institutions are: legal ownership (non-state or state ownership), contribution to society (private returns versus public good) and funding (research funding versus government subsidies) (Buncker, 2017). Bezuidenhout and De Jager (2014:207), concur that most PHEIs are profit-driven businesses and display a more “consumerist behavior towards HE”. At present, many PHEIs prioritise providing qualifications and producing graduates over research, mainly due to insufficient government subsidies and academic resources (Dirkse van Schalkwyk & Steenkamp, 2016). Stander and Herman (2017:213) agree that most PHEIs “are self-funded, and

therefore have limited resources available". According to a study conducted by Davids (2022), 72% of academic staff at PHEIs cited their research competency as emerging, indicating that they require support to develop their research skills.

The institution selected for the study, College A, is a PHEI offering more than 90 recognised and approved HE programmes ranging from higher certificate to PhD levels. Students can enrol in undergraduate and postgraduate degrees, diplomas, higher certificates, and short courses in design, brand communication, and brand management. PHEIs are also legally not allowed to include the word 'university' in their titles (Bezuidenhout & De Jager, 2014). Therefore, College A, although offering degrees, is not allowed to be known as a university.

College A employs two types of academics, full-time and part-time lecturers, called independent contractors (ICs). Part-time lecturers comprise over 80% of the total academic personnel and teach from two hours to a maximum of 600 hours a year, depending on their module allocation. Part-time lecturing contracting is a common practice for PHEIs, with most of the part-time lecturers actively pursuing careers in different industries (Stander and Herman, 2017:215). A major advantage of hiring part-time lecturers is that they bring current industry knowledge to the classroom, providing students with the necessary skills to succeed in the workforce. As previously mentioned, a drawback is that part-time lecturers are not compensated for non-teaching activities, which may make them hesitant to attend workshops or engage in professional development without payment.

College A offers courses in Johannesburg, Cape Town, Durban, Pretoria and on the distance campus. The central academic team is responsible for developing the formative and summative assessments across all the campuses. Lecturers are only responsible for developing class tasks that contribute 10% towards the formative mark of the students. The distance campus uses the services of 95 educators who are primarily independent contractors (part-time lecturers). The independent contractors' duties include teaching the allocated hours according to their timetables, grading scripts, and developing the class assessments. The LMS is populated with activities and reading material for the students. However, the educators can develop their own activities and PowerPoint slides to add to the LMS. Lectures are delivered only online

by combining predominantly self-directed learning, and synchronous and asynchronous online interactions with peers and online educators via Blackboard Learn, the LMS.

College A's teaching and learning strategy aims to produce high-quality graduates who possess critical and creative thinking skills. These graduates should be prepared for the workforce and able to contribute to the development of the economy and society in the 21st century. College A uses constructivist thinking as a teaching-and-learning approach that promotes active learning strategies, the use of technology to support teaching and learning, and the development of reflective practice on the part of educators to develop best practices in teaching and learning in HE. Bostock (1998:226) argues that constructivism "starts with the view that knowledge must be constructed within the cognitive structure of every individual so that it is fundamentally personal while being dependent on experiences in the learning environment and social interactions". The author further points out that the constructivist approach is a rich environment for active learning. Although Ertmer and Newby (2013) agree that constructivists view students as actively involved in the learning process, they add that the student is more than an active processor of information; he or she also elaborates upon and interprets given information. Bada (2015) concurs that learning is an active process central to the tenet of constructivism. The constructivist approach does not involve transmitting information to passive learners – it relies on the educator and student's active engagement in the process. Constructivist teaching and learning include encouraging discussions, promoting idea-sharing among peers and using real-life examples to give meaning to the lessons (Tenenbaum, Naidu, Jegede & Austin, 2001). As an online educator, it is crucial to create captivating and interactive learning spaces that foster positive learning outcomes for students who may not have the chance to connect in person within a traditional classroom setting. An institution's learning philosophy directly impacts online educators' roles and required competencies (Mapuya, 2021).

2.4 Roles and competencies of educators in a distance education context

In this section, I will first attempt to define educator roles and competencies in a DE learning environment before focusing on the roles and competencies identified by

previous researchers in their studies. Finally, the specific roles and competencies selected for this study will be explained in more detail. The subsection is important because the primary objective of the study is to determine the perceived roles and competencies for online distance educators in PHEIs.

Teaching in a DE context involves a variety of roles and competencies often not needed in face-to-face classroom teaching, thereby requiring a new skill set from both educators and students (Besser & Bonn, 1997). Therefore, institutions need to define the roles and develop competency frameworks to comprehend and manage both the individual and institutional challenges introduced by DE (Briggs, 2005). Clarity regarding the roles and competencies of DE educators can form the basis for future academic and professional development.

The seminal research by Alvarez, Guasch and Espaso (2009) addressed the need to clarify online educators' roles and associated competencies and the tasks they need to fulfil. Figure 2.5 presents the developed flow diagram depicting the theoretical structure to define online educators' roles and competencies (Alvarez et al., 2009).



Figure 2.5: Theoretical structure to define university teacher roles and competencies in online learning environments

Source: Alvarez et al., 2009

As depicted in Figure 2.5, it is important that roles are set out and defined first in order to be able to identify the required competencies (Alvarez, Guasch and Espaso, 2009, Bawane, 1999).

For the purposes of this study, 'role' is defined as "a major duty or function, which is performed by individuals in a specific field or profession", and 'competency' as "an area of knowledge or skill which is critical to the production of key outputs" (McLagan

& Suhadolnik, cited in Thach & Murphy, 1995). According to Rodolfa, Bent, Eisman, Nelson, Rehm and Ritchie (2005:345), the general understanding of competency is that a professional, in this case the online educator, “is qualified, capable, and able to understand and do certain things in an appropriate and effective manner”. Simply having knowledge or skill is insufficient for an individual to be considered competent, since competency also requires effective and appropriate action that entails decision-making, critical thinking and judgement. Competency in a profession also equates to behaviours that are compatible with peer review norms and rules, ethical principles, and professional ideals (Rodolfa et al., 2005).

Bawane and Spector (2009) agree that professional competency entails the capability (the knowledge, skills and values) to practise the profession safely and effectively. The diverse competencies of online educators can vary depending on the context of their role and the type of support and resources provided. DE as a system can minimise the number of roles of an online educator if administrative and technical assistance is provided. Online educators must have a diverse set of skills that vary not only by venue or function, but also by the resources and aid accessible.

Since 1994 (as discussed in the following paragraphs), the roles and competencies of online instructors have been researched in the DE space. Some key examples of these studies include the following. The early work of Thach and Murphy (1995) investigated the perceived key roles and competencies of DE professionals through a two-round Delphi process. A competency model was developed based on the results, presenting 11 key roles with competencies:

1. Instructor
2. Instructional designer
3. Technology expert
4. Technician
5. Administrator
6. Site Facilitator
7. Support staff
8. Editor
9. Librarian

10. Evaluation specialist

11. Graphics designer

In the study by Briggs (1995), respondents were asked to identify the main differences between the roles of online and traditional environments. The majority of the respondents (67%) were of the opinion that the roles (technologist, manager, co-learner, designer, e-tutor, knowledge expert, researcher, facilitator, assessor, adviser/counsellor and mentor) are the same except for the role of technologist.

In 2000 a group of researchers (Goodyear, Salmon, Spector, Steeples & Tickner, 2001) conducted a two-day workshop to define and discuss the role of an online instructor. Eight roles (content facilitator, technologist, designer, manager, process facilitator, adviser/counsellor, assessor and researcher) were proposed with a competency-based approach to define the skills needed to function as an effective online instructor. Williams (2003) replicated Thach and Murphy's study and reached the same conclusion but suggested two additional roles: the leader/change agent and trainer. Williams (2003) also advised that roles should not be confused with positions and titles, as many roles can be assumed within one position. In the study by Varvel (2007) seven broad functional role categories were proposed for online educator instructors, including a social category. The social role category refers to all the social functions an online instructor needs to function in an effective collaborative, student-centered online learning environment.

Yar, Asmuni & Silong (2008) aimed to determine the roles and competencies of distance education tutors in public universities based on student perceptions. The study showed students perceived the 'social role' as the most important role for a distance education tutor to perform. Alvarez, Guasch and Espasa (2009) contributed by selecting five role categories after a literature review but with the cautionary comment that university teachers' competencies can differ and overlap depending on the context of the online learning environment. In their study with eight award-winning online educators from across the USA, Martin, Budhrani, Kumar and Ritzhaupt (2019) identified four roles aligned with various parts of the teaching process, namely facilitator, content manager, subject matter expert, and mentor.

Khodabandelou et al. (2022) conducted a systematic review of 11 years of research (2010-2020) regarding the online roles and competencies of online instructors in the HE context. The study selected 43 papers and after extracting and coding obtained 13 main online instructor roles. As mentioned previously in section 1.3.1, the study included the work of Martin et al. (2021) and the Online Instructor Roles and Competencies (OIRC) instrument (used in my study), but none of the studies selected focused on the South African context.

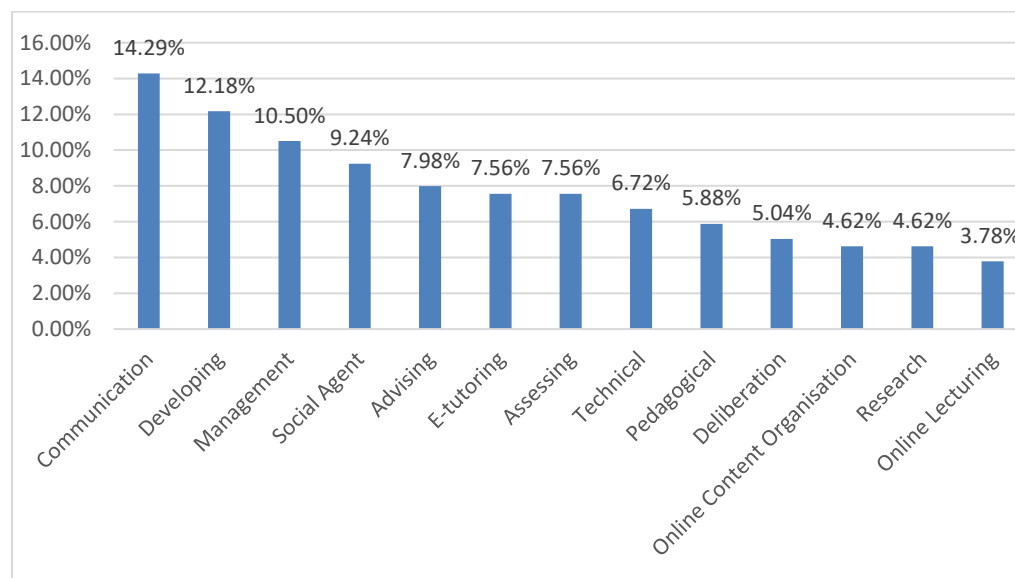


Figure 2.6: Online instructor roles
Source: Khodabandelou et al., 2022

As seen in Figure 2.6 above, the role of communication was the top role (14.29%), and included a set of sub-roles such as interaction and participation. Ranked second was 'developing' (12.18%) with sub-roles planning/developing/designing, and thirdly 'management' (10.50%), which had the sub-roles managing/delegator/delivering (Khodabandelou et al. 2022).

An interesting find of the study is the increasing trend of the role of communication. The statement was made by Khodabandelou et al. (2022:10) that "unlike traditional teaching, where teaching methods, objectives, content, and technology are more important, instructors in online teaching seem to be more dependent on communication roles than on any other component". The trend also underlines the importance of the paradigm shift from teacher-centred to student-centred approaches.

In the South African context, Bezuidenhout (2015) compiled a list of 46 roles to indicate the perceived importance of specific academic work roles in establishing academic workload. Bezuidenhout divided the 16 most important roles identified by the respondents at Unisa according to the four main pillars of the academic job, namely teaching and learning, research, academic citizenship, and community engagement. Roberts and Bezuidenhout then joined their research efforts in 2017 at Unisa and studied the various roles of distance educators through a content analysis of the literature (Roberts & Bezuidenhout, 2017). Roberts (2018) further investigated the perceptions of the teaching and research staff at Unisa in respect of the proposed roles (knowledge expert, student support, assessor, researcher, facilitator, technology expert, team player, mentor, instructional designer, administration/management) in the previous study. Table 2.1 lists the various online instructor roles found in the mentioned literature.

Table 2.1: Roles of online instructors

Year	Roles of online instructors	Researcher/s
1995	Instructor, Instructional designer, Technology expert, Technician, Administrator, Site Facilitator, Support staff, Editor, Librarian, Evaluation, specialist, Graphics designer	Thach and Murphy
1995	Technologist, Manager, Co-learner, Designer, e-tutor, Knowledge expert, Researcher, Facilitator, Assessor, Adviser/counsellor, Mentor	Briggs
2001	Content facilitator, Technologist, Designer, Manager, Process facilitator, Adviser/counsellor, Assessor, Researcher	Goodyear, Salmon, Spector, Steeples & Tickner
2003	Instructor, Instructional designer, Technology expert, Technician, Administrator, Site Facilitator, Support staff, Editor, Librarian, Evaluation, specialist, Graphics designer, Leader/change agent, Trainer	Williams
2007	Administrative, Personal, Technological, Instructional design, Pedagogical, Assessment, Social	Varvel
2009	Designer/planning role, Social role, Cognitive role, Technological domain, Managerial domain,	Alvarez, Guasch & Espasa
2018	Knowledge expert, Student support, Assessor, Researcher, facilitator, Technology expert, Team player, Mentor, Instructional designer, Administration/management	Roberts

2019	Facilitator, Content manager, Subject matter expert, Mentor	Martin, Budhrani, Kumar, Ritzhaupt
2021	Subject matter expert, Course designer and developer, Course facilitator, Course manager, Advisor/mentor, Assessor/evaluator, Technology expert, Lifelong learner	Martin, Kumar & She
2022	Communication, Developing, Management Social Agent, Advising, e-tutoring, Assessing, Technical. Pedagogical, Deliberation, Online content organisation, Research, Online lecturing	Khodabandelou, Charhabashloo, Ghaderi, Zeinabadi and Karimi

2.5 Chosen roles in the context of College A

College A offers DE programmes that are delivered fully online and remotely, in other words, online DE. The researcher decided to use the studies of Martin et al. (2021) and the Online Instructor Roles and Competencies (OIRC) instrument developed in 2019 in this present study since the aim was to establish a basis for the future development of a framework for academic staff development in PHE. It was therefore vital to include competencies in the study. Hence, the OIRC instrument from Martin et al. (2021) formed the guiding framework in the survey (see Annexure A). Stander and Herman (2017:212) stated that “the deflation of key roles and responsibilities within PHEIs is one of the major concerns. Participants indicated that the majority of PHEIs do not have clearly defined roles and responsibilities and very often one person assumes multiple roles”. While Stander and Herman’s (2017) study focused on PHEIs in general, I believe this also rings true for the College A online DE campus.

It is, however, important to recognise that roles and competencies can differ according to different types of DE technologies and contexts (Thach & Murphy, 1995). It is also clear that online educators are expected to fulfil diverse roles, and that educators are not the only role players in the DE environment. As explained previously, DE can be viewed as a system, and educators interact with other professionals such as technology experts, multimedia producers, instructional designers, graphic designers, multimedia producers, and media designers (Carril, Sanmamed & Sellés, 2013).

I am therefore aware that the selected roles and competencies are not exclusive but serve as a starting point in determining the perceived roles and competencies of educators in private online DE.

The identified roles of the online instructor can be categorised into eight types with their corresponding competencies, namely (i) subject matter expert, (ii) course designer and developer, (iii) course facilitator, (iv) course manager, (v) advisor/mentor, (vi) assessor/evaluator, (vii) technology expert, and (viii) lifelong learner (Martin et al., 2021). Each of these roles will be discussed in more detail below.

(i) Subject matter expert

Educators are primarily employed as knowledge experts in the modules that they lecture. As indicated in the literature, several authors have identified the importance of subject matter expertise for online educators. Thach and Murphy (1995), Aydin (2005) and Chang et al. (2014) mention that educators need to be competent in their subject matter. In the South African context, Roberts' (2018) study confirms this by indicating that being a knowledge expert is the most important role of DE educators.

Competencies of subject matter expert (Martin et al., 2021):

- Demonstrate content expertise.
- Stay current with research and theories in the field.
- Contribute relevant content to course outcomes.
- Collaborate with instructional designers to develop the course.
- Ensure that the course content is accurate.

At the institution chosen for this study, educators need to hold at least an honours degree in their field of study, paired with industry experience.

(ii) Course designer and developer

Course or instructional design is defined as “the systematic development of instructional specifications using learning and instructional theory to ensure the quality of instruction” (Fry, Ketteridge & Marshall, 2009:54). In their studies, several authors have mentioned the role of the course designer or developer (Farmer & Ramsdale, 2016; Roberts & Bezuidenhout, 2017; Roberts, 2018; Martin et al., 2019; Martin et al., 2021). Khodabandelou et al. (2022) stated that the role of designer and developer in the online environment is more complex due to the openness and freedom that an online educator faces. Designing and developing a course in the online DE space is a demanding task and educators need to work collaboratively with several individuals

like graphic and media designers to produce a high-quality course (Albrahim, 2020). In their research conducted across 32 different colleges, Hung and Chou (2015) found that where the courses had good instructional design and organisation, there was a stronger sense of a learning community. Well-designed learning environments allow students to take more responsibility for their studies by providing a deep and broad interaction with course materials and promoting student collaboration. In a study by Gómez-Reya, Barbera and Fernández-Navarro (2017), Spanish students ranked the role of course designer as the second most important. A well designed and developed course serves as the basis for a successful learning experience.

In the context of the researched institution, this is critical as students are encouraged to actively participate in their studies as part of the institution's constructivism philosophy. The central academic team develops courses or programmes, and the learning management system is preloaded with content for the educators. Educators are, however, encouraged to upload their own material such as PowerPoint slides, additional notes and readings, videos, and any supplementary content that can enrich the students' learning experience.

Competencies of course designer and developer (Martin et al., 2021):

- Establish learning objectives.
- Develop learning activities.
- Include existing instructional resources.
- Develop digital learning materials.
- Ensure alignment between objectives, content and assessment.
- Develop a course on the learning management system.
- Provide consistent course structure.
- Design intuitive course navigation.
- Consider culturally inclusive content.

(iii) Course facilitator

According to Harden and Crosby (2000), educators are no longer predominantly the dispensers of information or walking tape recorders but rather facilitators who manage students' learning. The fundamental shift in the role of educators is a move towards a

more student-centred view of learning that is also encouraged by College A. Beck and Ferdig (2008) agree that to change from educator-centred to student-centred learning in an online learning environment, educators must engage, interact, and facilitate rather than lecture. Martin et al., 2021 categorise 'use active learning strategies to engage learners' as a competency of a course facilitator. Gómez-Reya's et al. (2017) study also mentioned that students value active learning where students and instructors can interact and engage in activities. As mentioned in section 2.3, College A adheres to a constructivist approach to teaching and learning that underpins active learning. 'Foster interaction among students' is also categorised as a competency of a course facilitator by Martin et al., (2021) and the study by Khodabandelou et al. (2022) supports this idea as their research highlights the importance of communication and interaction in online learning. They, however, caution that the interaction between students, and their educator can be challenging, and professional development is needed to support educators in the role.

Competencies of course facilitator (Martin et al., 2021):

- Create a welcome message (announcement, video).
- Check in with students frequently.
- Help students develop self-regulated learning skills (time management).
- Host synchronous sessions if applicable.
- Hold online office hours.
- Facilitate online discussions.
- Use active learning strategies to engage learners.
- Provide timely and substantive feedback.
- Foster interaction among students.
- Interact in a culturally sensitive manner.
- Offer multiple perspectives.
- Encourage student reflection.
- Create a sense of community among students from the same course.

(iv) Course manager

Educators in online learning are also course managers, also described in the literature as administrators or administration/leadership (Thach & Murphy, 1995; Williams,

2003; Aydin, 2005; Bawane & Spector, 2009). While different studies use different terms, the essence of a course manager is clear: An educator also fulfils the role of administering programme or course policies and grades while ensuring adherence to departmental and institutional policies (Martin et al., 2021). It is however an interesting remark made by Khodabandelou et al. (2022) that many higher education institutions have online support teams (media planner and assistant, content specialist, education planner and course manager) to support online educators. This allows online educators to focus more on communication and facilitation competencies.

Competencies of course manager (Martin et al., 2021):

- Monitor student participation.
- Provide clear instructions to students.
- Be responsive to individual students' needs.
- Enforce course and institutional policies.
- Resolve potential conflicts among students.
- Connect students with institutional support services.

(v) Advisor/mentor

DE institutions experience a high drop-out rate among students compared to students at contact institutions (Boyle, Kwonb, Ross & Simpson, 2010). Anderson and West (2020) highlight the emotional needs of today's HE students as well as efforts to increase student retention. DE is changing the way students learn, which can be very isolating. Hence, students need to acquire new skills such as persistence, self-regulation, and motivation (Anderson & West, 2020). Educators, in their role as mentors, need to guide students in discovering the most effective learning path and having a meaningful university experience. Subject matter expertise can strengthen mentoring or advising capabilities, but more critical is educators' commitment to assisting students in achieving their academic and professional goals (Anderson & West, 2020).

Martin et al. (2019) note that online educators must also act as 'advisors' and 'mentors'. Older studies, including those of Goodyear et al. (2001), Aydin (2005), Bawane and Spector (2009) and Carril et al. (2013), refer to this role as 'consultant' and 'counsellor' who advises students. The authors of more recent studies, such as

Roberts and Bezuidenhout (2017), Roberts (2018), Martin et al. (2019) and Martin et al. (2021), classify this role as 'mentor'. The researched institution encourages educators to act as mentors and advisors to their online students to overcome the mentioned weaknesses of DE.

Competencies of advisor/mentor (Martin et al., 2021):

- Advise students on their academic development.
- Advise students on their professional development.
- Motivate students to succeed.
- Guide students to be self-directed and responsible for their coursework.
- Guide students to access resources when needed.
- Mentor other colleagues who also teach online.

(vi) Assessor/evaluator

According to Beeler (cited in Bitzer, 2009), assessment is possibly the one function of HE that creates the most anxiety among students and frustration among academics. Literature studies indicate significant variation in how academics think about assessment and its definition (Huba & Freed, 2000; Allen, 2007). Both Shay and Jawitz (2005) and Gravett and Geyser (2004:91) mention that assessment is deemed as the most influential tool that educators can use to impact students' learning. Online educators at College A are required to grade formative and summative assessments online and provide students with constructive feedback via a general comments section (voice recordings and typed) and by completing rubrics.

Competencies of assessor/evaluator (Martin et al., 2021):

- Use a variety of assessments (quizzes, projects).
- Align assessment to objectives and activities.
- Establish clear grading criteria for assessments.
- Assess students' work.
- Monitor individual student and group progress.

(vii) Technology expert

When teaching in a DE institution, educators must possess technological proficiency

and expertise in utilising the LMS and interactive technologies that enable online communication (Liu et al., 2005). Technological proficiency can create or improve opportunities for reflective and collaborative learning. On the other hand, lacking this competency in using technology effectively may lower the quality and efficiency of teaching (Khodabandelou et al., 2022). It is generally acknowledged in the literature that online educators need to be technology experts (Thach & Murphy, 1995; Bawane & Spector, 2009; Roberts & Bezuidenhout, 2017; Martin et al., 2021). Online educators at College A need technical skills and knowledge of the learning management system and interactive technologies to facilitate teaching and learning. Also, it is a precondition that educators have the technical capabilities to support and guide online students' technical skills (Lee, 2011).

Competencies of a technology expert (Martin et al., 2021):

- Ensure that students are comfortable in the learning environment.
- Orient the students to the online course.
- Use appropriate technology to support learning.
- Provide students with resources for technical help and support.

(viii) Lifelong learner

Martin et al. (2021) suggests that online educators are lifelong learners. Bezuidenhout (2015) included the role of lifelong learner, in her research by defining the role as continuously improving your knowledge, skills and attitudes. Educators must be willing to learn since online environments and technologies constantly change. Also, educators need to reflect on their teaching and learning practices and explore new teaching practices (Martin et al., 2021). At the researched institution, educators are encouraged to review their teaching practices and attend biweekly training sessions.

Competencies for lifelong learning (Martin et al., 2021):

- Integrate best practices from research into online teaching.
- Engage in professional development on online learning.
- Share and learn from peers about online teaching practices.
- Use data from the online course for continuous improvement.
- Keep pace with the advances in educational technologies.

The following section will briefly provide background to the Coronavirus pandemic and how it impacted technology in HE.

2.4 The impact of COVID-19 on technology use in higher education

On 23 March 2020 the president of South Africa announced a three-week lockdown period due to COVID-19. This announcement took all sectors of society in South Africa (and the rest of the world) by surprise, including the HE sector (Pather, Booie & Pather, 2020).

Sife, Lwoga and Sanga (2007) note that several pedagogical and socioeconomic considerations have compelled HEIs to use technology such as synchronous learning. While these factors are valid drivers, it is important to acknowledge how the COVID-19 pandemic also impacted technology in higher education. The COVID-19 lockdown period forced many students and staff to leave their institutional residences and return home due to discontinued face-to-face teaching and learning (Du Preez & Le Grange, 2020). Higher education institutions hastily changed their teaching and delivery model to fully online (Pather et al., 2020). Pérez-Sanagustin et al. (2022:30) concurs that during the COVID-19 pandemic, HEIs across the globe moved towards “emergency online education”, experiencing a metamorphosis that advanced their capacities and competencies as never before. In the same vein, Korkmaz and Toraman (2020) assert that digital transformation, identified with Industry 4.0 in the literature, has been expedited by the forced lockdown in HE due to COVID-19. Many educational institutions have begun to use various distance education systems and techniques. Digital learning management systems have turned into a necessity for transforming the habits of both lecturers and students. According to Professor Jonathan Jansen, campus closure due to COVID-19 was not an isolated occurrence, as instances like the #FeesMustFall period had “catalysed the adoption of online learning techniques and the development of infrastructure necessary for students to complete their courses without having to attend lectures or tutorials” (Walwyn, 2020:1). Motala and Menon (2020:82) furthermore conclude that COVID-19 has “added a new layer of complexity and uncertainty to an already volatile and contested higher education sector, evidenced by protests on fees, decolonisation and affordability amongst other concerns”.

The COVID-19 impact on technology use in HE resulted in challenges for academics and students alike. As mentioned in the previous section, the COVID-19 outbreak forced lecturers accustomed to on-campus, face-to-face lecturing to shift quickly to remote learning, named “emergency remote teaching” (Du Preez & Le Grange, 2020). Du Preez and Le Grange (2020) argue that well-planned online university courses that typically take six to nine months to develop are not akin to online courses offered in response to a crisis like the COVID-19 lockdown. Moreover, lecturers usually become more comfortable teaching online by the second or third iteration of their online courses, whereas COVID-19 has forced lecturers to become instant experts in online teaching and learning (Du Preez & Le Grange, 2020).

Walwyn (2020) suggests that COVID-19 has provided the pivotal opportunity to rethink teaching practice (pedagogy) and revise how lecturers are educated. Lecturers in the online teaching and learning delivery mode need to acquire sophisticated technical and pedagogical competency levels, and such competency cannot be developed overnight (Du Preez & Le Grange, 2020).

2.5 Conclusion

This chapter explored the underlying concepts and context of the study. The definition of DE was outlined in the first section, and the viewpoint that DE forms part of a system was explained.

The context of the chosen institution for this study was explained before the roles and competencies of online distance educators were outlined by providing an overview of previous studies in this field and introducing the selected roles and competencies for this study. Lastly, the impact of COVID-19 on HE was also addressed.

CHAPTER 3

RESEARCH METHODOLOGY

3.1 Introduction

This chapter focuses on the research methodology that was used to determine the perceived roles and competencies of online DE educators in a PHEI. This objective was guided by the following the two research sub-questions, namely 1. *how important do the educators perceive the given roles and competencies as online distance educators in private higher education?* and 2. *how competent do the educators perceive themselves to be in the given roles and competencies as distance educators?* It is anticipated that the results of the study will form the basis for the future development of a framework for academic staff development in private online distance higher education. This research methodology chapter, which serves as a guide for the research process, provides an overview of the research aim and objectives, research technique, data gathering methods, and data analysis approaches employed in this study.

3.2 Research paradigm

‘Paradigm’ is a term used in research to describe a researcher’s worldview (Mackenzie & Kipe, 2006). According to Kivunja and Kuyini (2017:26), this means that a paradigm “constitutes the abstract beliefs and principles that shape how a researcher sees the world, and how s/he interprets and acts within that world”. Furthermore, it provides the researcher with a conceptual lens to explore their research project in order to choose which research methodologies will be used and how the data will be analysed.

Henning, Van Rensburg and Smit (2004:17) point out that a positivist framework is a philosophical position that implies that the aim of knowledge is “simply to describe and in some designs, to explain and also to predict the phenomena that we experience (whether quantitative or qualitative)”. Guba (1994) (in Kivunja & Kuyini, 2017) concurs that the positivist paradigm upholds the belief that reality is out there to be studied, captured and understood.

As the study used a quantitative self-administered web-based survey to determine the

perceived importance of the roles and competencies of private online distance education educators, the positivist paradigm was best suited. The research enabled me to study, capture and understand the importance of the roles and competencies of private online DE as perceived by educators.

3.3 Research design

Subsequent to gaining clarity on the paradigm underpinning the study, the research design was considered. Bryman, Bell, Hirschsohn, Dos Santos, Du Toit, Masenge, Van Aardt and Wagner (2014:100) explain that a research design “provides the structure that guides the use of a research method and the analysis of the subsequent data”. In support of this view, Cooper and Schindler (2014) state that a thoroughly planned research design will ensure objective results.

Three main approaches to collecting data exist, namely quantitative research, qualitative research, and a mixed methods approach. The meanings represented through words and visuals in qualitative research are different from the meanings generated from data in quantitative research (Saunders, Lewis & Thornhill, 2016). Mixed methods research combines qualitative and quantitative research (Berndt & Petzer, 2011). As mentioned, the research design for this study was quantitative, and the motivation behind this choice is summarised in Table 3.1 below.

Table 3.1: A comparison of quantitative and qualitative research

Comparison dimension	Qualitative research	Quantitative research	Quantitative research applied to the research problem
Types of questions	Probing	Non-probing	The questions in the survey are direct without any probing required.
Sample size	Small	Large	The sample size is 96.
Administration	Interviewers with special skills are required.	Fewer special skills are required of interviewers.	Due to the simplicity of the questions, no interviewing skills are required.

Type of analysis	Subjective, interpretive	Statistical, summarisation	The analysis is statistical and objective.
Type of research	Exploratory	Descriptive, causal	Descriptive research is used.
Data presentation	Words	Numbers	Mixed data will be presented, but mainly numbers.
Researcher involvement	Participating in and/or being engaged in a research scenario allows the researcher to learn more.	The researcher is an objective observer who does not engage in or influence what is being Investigated.	The researcher is an objective observer.

Source: Adapted from Wiid and Diggines (2015)

This study employed a survey design using a quantitative web-based survey compiled by me, as the researcher (SUNSurveys). Artz (2007) defines a web-based survey as a survey instrument to gather information from a geographically dispersed audience via the World Wide Web. The web-based survey design was selected for three main reasons. Firstly, since College A's educators are not campus-based, it was easier to reach them online and request completion in their own time, thus making it more convenient for respondents to complete. Secondly, as suggested by Wiid and Diggines (2015), web-based surveys are self-administered and eliminate interviewer bias. Lastly, a web-based survey was used to emulate similar studies in order to enable better comparison between the results (Roberts, 2018; Martin et al., 2021).

3.4 Research method

The research method, will be discussed in the following section. The focus will be on the form of data collection, analysis and interpretation applied in this study.

3.4.1 Data collection method

A web-based self-administered quantitative survey was utilised for data collection using a Checkbox software known as SUNSurveys (see Addendum A: Roles and competencies for online distance educators employed by a private higher education

institution). The survey consisted of three sections. First, the respondents were asked to provide demographic information regarding their years of experience in education and employment at a distance higher education. Next, the respondents were required to indicate their perception of the importance of each of the eight role categories (The Online Instructor Roles and Competencies (OIRC), Martin et al., 2021):

1. Subject matter expert (SME)
2. Course designer and Developer
3. Course facilitator
4. Course manager
5. Advisor/mentor
6. Assessor/evaluator
7. Technology expert
8. Lifelong learner

A 5-point Likert scale item was used: 1=Not at all important, 2=Slightly important, 3=Important, 4=Important, and 5=Very important. Subsequently, the respondents rated their perceived competency for each role and associated competencies. A 5-point Likert scale was used: 1=No level of competency (no experience), 2=Low level of competency (little experience), 3=Average level of competency (some experience), 4=Moderately high level of competency (good experience), and 5=High level of competency (extensive experience). Lastly, the respondents completed three open-ended questions. The questions were phrased as follows:

- “Have you ever taken on a role in an online course other than the ones listed?”
- “Which role/roles are, according to you, the most challenging?”
- “Why is this role/s the most challenging?”

3.4.2 Target population

A study's target population is the complete group of people who are the actual focus of the research inquiry and from whom the sample must be drawn (Saunders et al., 2016). The present study focused on online DE educators at the largest private HEI in South Africa that offers contact and online distance programmes across the National Qualification Framework (NQF) 5–10 across 21 campuses. The institution manages

five independent brands or institutions, which include two online DE campuses. The target population for this study was all the online DE educators (N=96) employed by the institution. In this study, the two brands included are referred to as one unit - 'College A' - as the educators are all managed by a central academic team. It was, therefore, a census study. A census study targets the entire population and does not use sampling to represent the population.

3.4.3 Pretesting of the questionnaire

Berndt and Petzer (2011) explain that a pilot study is an essential component of research survey design. In the same vein, Bryman (2014) states that a pilot study must be conducted before a self-administered questionnaire is sent out to the entire sample. It entails a small-scale study to establish whether the questionnaire is sufficiently clear and whether there are any objections on cultural, religious or moral grounds. It is also used to determine the length of time it takes for the respondents to complete the questionnaire. A pilot study was therefore conducted on a sample of four online distance educators from the researched institution to test the data collection technique and to ensure that the questions in the questionnaire were understood correctly. A minor adjustment was made to one question to ensure that the instruction was clear. The survey was emailed to 96 respondents via a gatekeeper at each brand to comply with the Protection of Personal Information Act.

The respondents were requested to complete the survey between 21 September and 3 October 2022. The majority of the responses (64%) were received within 24 hours, with an overall response rate of 45%. It is also noteworthy that the respondents provided detailed comments in the three open-ended questions.

3.5 Data preparation

Raw data gained from a questionnaire must undergo a process whereby it is converted into useful information. This process is referred to as data preparation (Lamb, Hair, McDaniel, Boshoff & Terblanche, 2015). Data preparation followed the data collection process discussed above and involved editing and data capturing techniques, which will be discussed below.

3.5.1 Editing

Data are edited to ensure that answers are comprehensive, correct and suitable for further processing (Cant & Van Heerden, 2017). I undertook the editing, and all the completed questionnaires were inspected to determine which of the questions had been answered incorrectly or not answered at all. All the answered questions were included, and no questionnaires were rejected.

3.5.2 Data capturing

I then captured the data on a Microsoft Excel spreadsheet. SUNsurveys and Microsoft Excel were used to create a clear, analytical, and visually informative summary of the responses. Demographic data of the respondents, as well as data on the perceived importance of the roles and competencies of private online distance education educators were graphically presented using bar and pie charts.

The following section will focus on the data analysis and interpretation.

3.6 Data analysis and interpretation

According to Aaker, Kumar and Day (2004), to enable me to make recommendations and draw conclusions from the study, the raw data received from questionnaires (SUNsurveys) needs to be analysed to provide valid and reliable findings. In this study, descriptive statistics were used to analyse the quantitative data, while thematic analysis was used to analyse the responses to the three open-ended questions. In addition, the interpretations of the findings were substantiated by referring to previous studies.

3.6.1 Descriptive statistical analysis

As mentioned, the study utilised Martin et al.'s (2021) work and the Online Instructor Roles and Competencies (OIRC) instrument. Descriptive statistics were used to replicate Martin et al.'s (2021) analysis method.

The function of descriptive statistics is to organise, summarise, and extract data so that the user may find profiles, patterns, correlations, and trends within the data (Gravatter & Forzano, 2009). Both Saunders et al. (2016) and Gravetter and Forzano

(2009) note that descriptive statistical analysis enables a researcher to describe and compare variables numerically. In this study, frequency counts and the corresponding percentage, as well as the mean, were employed to illustrate the research findings. Furthermore, standard deviation was included to indicate the average distance that the data values varied from the mean (Du Plooy-Cilliers, Davis & Bezuidenhout, 2014). A Mann-Whitney U test was conducted to evaluate the perceived importance of roles versus the perceived role competency. To make the presentation and comprehension of the data more accessible, the results were displayed in graphs and tables.

3.6.2 Analysis of open-ended questions

Thematic analysis was used to analyse the three open-ended questions. In the first question, the respondents were requested to mention roles not included in The Online Instructor Roles and Competencies (OIRC) instrument. The last two open-ended questions were thematically coded, assigning each answer to one of the eight roles category (The Online Instructor Roles and Competencies (OIRC) (Martin et al., 2021).

3.7 Ethical considerations

The guidelines of the Stellenbosch University research policy were followed in completing the web-based survey. The proposed study was submitted for ethical clearance to the Stellenbosch University Ethics Committee. Permission to interview the educators was also received from the research institution with the condition that the institution remains anonymous in the research report. Moreover, no personal information of the respondents, such as the names, surnames or personnel numbers of the respondents, was shared with me, as the researcher, and the survey was distributed by gatekeepers. Respondents could complete the questionnaire in their own time and were under no obligation to complete all the questions.

3.8 Reliability and validity

If the results of a study's measures are repeatable and consistent, the study can be viewed as reliable (Bryman et al., 2014). For this particular study, internal reliability was ensured in that each of the indicators tested in the questionnaire was related to the aim of the study. Each indicator tested a particular concept needed to answer the

research question.

Validity, as defined by Kumar (2011:178), is “the degree to which the researcher has measured what he has set out to measure”. Validity is primarily measured by face and content validity, predictive validity, and construct validity in quantitative research (Kumar, 2011).

Face and content validity is the extent to which a measure reflects the content of the concept of the question (Bryman et al., 2011). In this study, a logical link exists between the questions and the objective of the study. Criterion validity reflects how well an instrument can forecast an outcome (Kumar, 2011). The constructed web-based survey, such as the one utilised in this study, has been used in similar studies and is the norm to establish the roles with competencies of educators. Construct validity, according to Kumar (2011), is an indication of the quality of the research instrument to measure what it is supposed to measure. For this study, the web-based survey questions were designed to address the objective of the study.

The pilot study contributed to reliability and validity by testing the data collection technique and ensuring that the questions in the questionnaires were understood correctly.

The most used metric for measuring tool reliability is Cronbach's alpha, according to Hoekstra, Vugteveen, Warrens and Kruijnen (2019). The results of the test value of Cronbach's alpha were 0.994, as seen below in Figure 3.1 (SPSS® Statistics). A value of 0.75 or higher is considered an acceptable value for the reliability of the variables (Tavakol & Dennick, 2011).

Cronbach's Alpha	Cronbach's Alpha Based on Standardized Items	N of Items
,994	,995	72

Figure 3.1: Reliability statistics

3.9 Conclusion

In this chapter, the research methodology of the study was explained. The research aim and objectives were identified, whereafter the research paradigm and research design were specified and applied to the study. Subsequently, the research method that was used in this study was described and explained, followed by an illustration of the data preparation and analysis processes. Finally, the ethical considerations and reliability and validity of the study were addressed. The following chapter will focus on the data analysis and interpretation of the findings.

CHAPTER 4

DATA ANALYSIS AND INTERPRETATION

4.1 Introduction

This chapter presents and analyses the results of the web-based survey to determine the perceived importance of the roles and competencies of private online DE educators. A quantitative research approach was followed, and descriptive statistics were utilised to achieve the aim of the study.

4.2 Questionnaire results

As mentioned in Chapter 3, a quantitative self-administered web-based survey, compiled by me, as the researcher (SUNSurveys), was used to collect the data. The survey was distributed to 96 online distance educators at a PHEI in South Africa via an email database with 43 responses (45%). The survey consisted of three sections with seven questions (Annexure A), as explained in Chapter 3. With the presentation of the results of the first two questions, the results of the last five questions will be presented together since the responses form a cohesive interpretation.

4.2.1.1 Experience results

The first section of the questionnaire, comprising the first two questions, focused on understanding firstly, the respondents' lecturing tenure, and secondly, their tenure in the DE environment.

4.2.1.2 Lecturing tenure

The results regarding lecturers' tenure in HE are graphically represented in Figure 4.1 below.

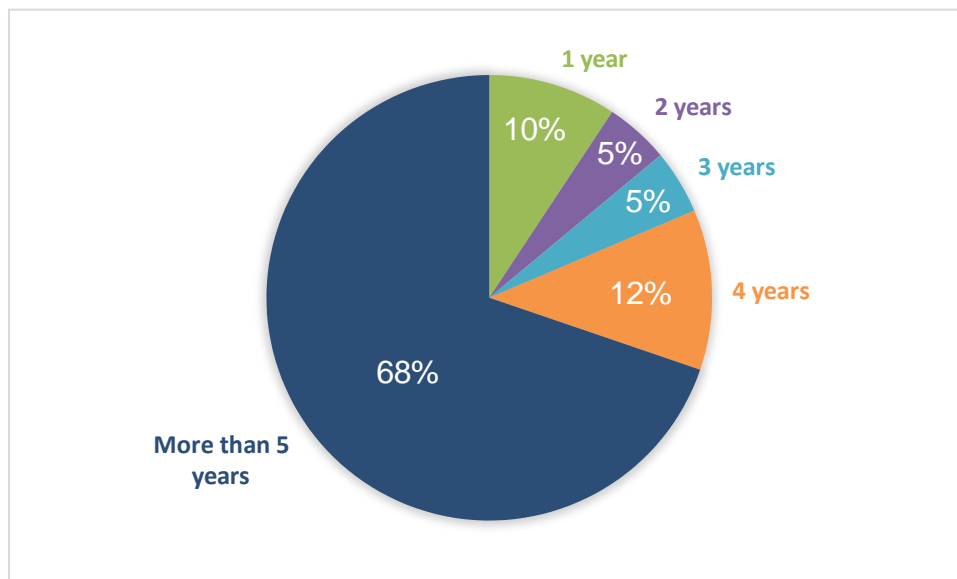


Figure 4.1: Percentage distribution of respondents' lecturing tenure (n=43)

As seen in Figure 4.1, a 68% majority of the sampled respondents had been employed as educators for more than five years. This indicates that a significant number of respondents were experienced educators. Moreover, 12% of respondents indicated four years of employment. Of the remainder of respondents, 5% indicated that they had been employed for two years, with another 5% employed for three years, while 10% indicated that they had been employed for a year. Notably, none of the respondents indicated a tenure of less than 12 months.

4.2.1.2 Lecturing tenure in distance education

Figure 4.2 below illustrates the respondents' lecturing tenure in DE.

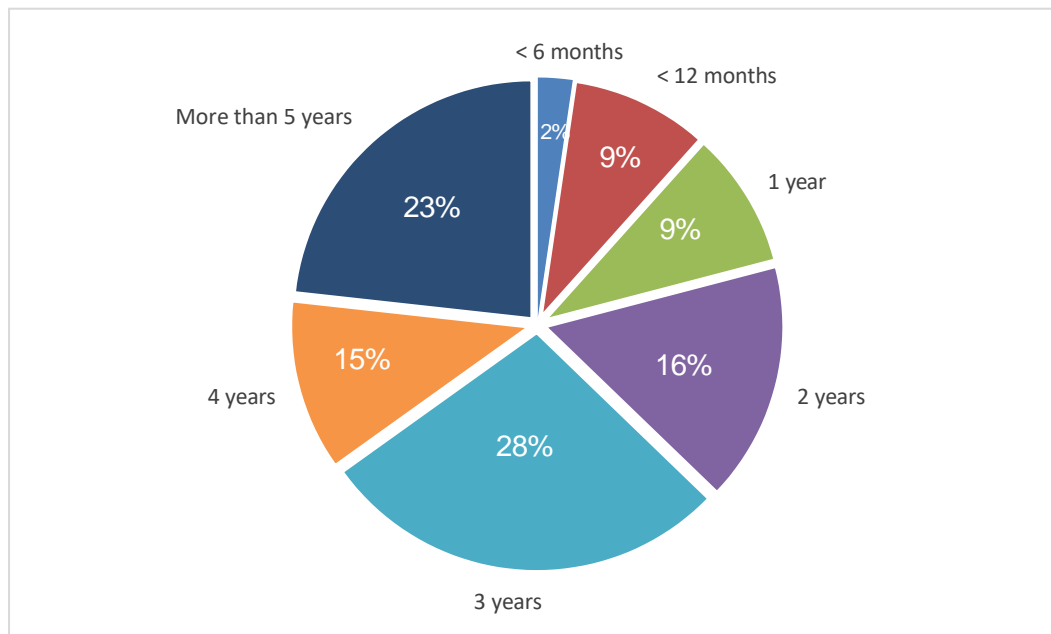


Figure 4.2: Percentage of respondents' lecturing tenure in DE (n=43)

As depicted in Figure 4.2, a 28% majority of the sampled respondents had been employed as DE educators for three years, while 15% of respondents indicated four years of DE employment and 23% of respondents had been employed as DE educators for more than five years. This indicates that a significant number of respondents were experienced DE educators. Of the remainder of respondents, 16% had been employed as DE educators for two years, 9% had been employed for one year, 9% for less than a year, and only 2% indicated that they had been employed for less than six months.

These results showed that the majority of respondents (80%) were experienced educators in HE with over four years of tenure, while only 38% had been employed as online DE educators for the same number of years. Although educators have experience in higher education (80%), most have less than four years of tenure in DE (62%), which warrants research into how competent educators perceive themselves to be in the given roles and competencies as distance educators, and how the institution can support their academic staff development.

4.2.2 The perceived importance and competency of the roles of private distance education educators

In the next section of the survey, respondents were asked firstly to indicate how *important* they perceived each role as a private distance educator to be, and secondly

to indicate their perceived *competency* for each role as a distance educator using a 5-point Likert scale. The responses were scaled from 1 'not at all important' to 5 'very important' and 1 'no level of competency' (no experience) to 'high level of competency (extensive experience)'.

The last three questions in the questionnaire were open-ended. The educators were requested to respond to the following:

- Have you ever taken on a role in a distance module other than the ones listed in the previous question? If so, please advise.
- Which role/roles are, according to you, the most challenging?
- Why is this role/s the most challenging?

As explained in Chapter 3, descriptive statistics were used to analyse the quantitative data, and thematic analysis was used to analyse the responses to the three open-ended questions.

In the following section, an overview of the results of all the roles will be presented before each role posed in the questionnaire will be analysed by providing Means and Standard Deviations supported by feedback from the responses to the open-ended questions.

4.2.2.1 Overview of findings: Roles and competencies of private distance education educators

As shown in Table 4.1 below, all eight roles had a categorical mean above 4, which shows that all the roles were perceived as fairly important by the respondents. This indicates that the roles selected from the study of Martin et al. (2021) were all perceived as important by online DE educators in a private HEI. In addition, respondents perceived themselves as having a moderately high level of competency (good experience) in all the roles, except for the role of a lifelong learner (M=3.91). Respondents perceived their competency in this role as average (some experience). Table 4.1 also includes the standard deviation (SD) for each individual role will be discussed in section 4.2.2.2.

Table 4.1: Descriptive statistics of roles and competencies of private online distance education educators

Role and competencies	Importance Mean	Importance SD	Competency Mean	Competency SD
(i) Subject matter expert	4.54	0.23	4.35	0.47
Demonstrate content expertise.	4.74	0.24	4.71	0.11
Stay current with research and theories in the field.	4.56	0.06	4.40	0.42
Contribute relevant content to course outcomes.	4.64	0.14	4.31	0.51
Collaborate with instructional designers.	4.03	0.47	3.83	0.99
Ensure that the course content is accurate.	4.74	0.24	4.51	0.31
(ii) Course designer and developer	4.13	0.93	4.37	0.99
Establish learning objectives.	4.18	0.89	4.45	0.91
Develop learning activities.	4.28	0.79	4.52	0.84
Include existing instructional resources.	3.92	1.15	4.15	1.21
(iii) Course facilitator	4.20	0.38	4.13	0.06
Create a welcome message.	4.26	0.25	4.19	0.03
Check in with students frequently.	4.34	0.17	4.16	0.16
Help students develop self-regulated learning skills.	3.92	0.59	3.97	0.10
Host synchronous sessions if applicable.	4.24	0.27	4.23	0.55
Hold online office hours.	3.24	1.27	3.58	0.26
Use active learning strategies to engage students.	4.63	0.12	4.39	0.32
Provide timely and substantive feedback.	4.66	0.15	4.45	0.10

Foster interaction among students.	4.32	0.19	4.03	0.06
(iv) Course manager	4.07	0.54	4.02	0.425
Monitor student participation.	4.00	0.5	3.80	0.62
Provide clear instructions to students.	4.84	0.34	4.50	0.08
Be responsive to individual student needs.	4.24	0.26	4.33	0.09
Enforce course and institutional policies.	4.11	0.39	3.90	0.52
Resolve potential conflicts among students.	3.08	1.42	3.77	0.65
Connect students with institutional support services.	4.16	0.34	3.83	0.59
(v) Advisor/Mentor	4.29	0.68	4.15	0.65
Advise students on their academic development.	4.19	0.78	3.97	0.83
Advise students on their professional development.	3.81	1.16	3.97	0.83
Motivate the students to succeed.	4.51	0.46	4.34	0.46
Guide students to be self-directed and responsible for their coursework.	4.65	0.32	4.31	0.49
(vi) Assessor/Evaluator	4.40	0.70	4.30	0.67
Use a variety of assessments (quizzes, projects).	4.31	0.79	4.14	0.83
Align assessment to objectives and activities.	4.75	0.35	4.41	0.56
Assess students' work.	4.69	0.41	4.52	0.45
Monitor individual student and group progress.	3.86	1.24	4.14	0.83
(vii) Technology expert	4.21	0.04	4.05	0.08
Ensure that students are comfortable in the learning environment.	4.17	0.04	4.14	0.08
Orient the students to the online environment.	4.25	0.04	3.97	0.09

(viii) Lifelong learner	4.31	0.67	3.91	0.61
Integrate best practices from research into distance teaching.	4.28	0.69	4.07	0.45
Engage in professional development on distance learning.	4.22	0.75	3.72	0.8
Share and learn from peers about distance teaching practices.	4.25	0.72	3.79	0.73
Keep pace with the advances in educational technologies.	4.47	0.50	4.07	0.45

The mean scores calculated for the perceived importance of each role are arranged in descending order of importance in Table 4.2 below. For example, the role of subject matter expert (highest mean score) is indicated in first place, and that of course manager (lowest mean score) is placed in the least important (8th) position.

Table 4.2: Descending order of perceived importance of role

Subject matter expert	4.54
Assessor/evaluator	4.40
Lifelong learner	4.31
Advisor/mentor	4.29
Technology expert	4.21
Course facilitator	4.20
Course designer and developer	4.13
Course manager	4.07

The mean scores calculated for each perceived role competency are arranged in descending order in Table 4.3 below. For example, the perceived competency in the role of course designer and developer (highest mean score) is indicated in the first place, and that of lifelong learner (lowest mean score) is placed in the least perceived role competency (8th) position.

Table 4.3: Descending order of perceived role competency

Course designer and developer	4.37
Subject matter expert	4.35
Assessor/evaluator	4.30
Advisor/mentor	4.15
Course facilitator	4.13
Technology expert	4.05
Course manager	4.02
Lifelong learner	3.91

As seen in Table 4.2 and 4.3, respondents perceived the role of course designer and developer as second to last in terms of importance but rated it as the role they are most competent in. As mentioned in Chapter 2, the central academic team is responsible for developing the formative and summative assessments across all the campuses. Educators are only responsible for developing class tasks that contribute 10% towards the formative mark of the students.

The respondents identified the following additional roles:

- Supervisor for postgraduate students
- Panel member for presentations
- Panel member for plagiarism hearings

Lastly, the respondents were asked to respond to the question, 'Which role/roles are, according to you, the most challenging, and why?'

Table 4.4 shows that 39 educators (n=39) replied to the above open-ended questions and mentioned the roles indicated below as challenging.

Table 4.4: Descending order of challenging roles

Roles	n=39	Percentage
Advisor/mentor	11	28%
Course facilitator	9	23%
Course designer and developer	6	15%
Lifelong learner	5	13%
Course manager	4	10%
Assessor/evaluator	2	5%
Technology expert	2	5%

As illustrated in Figure 4.3 below, the respondents found all their roles challenging, except that of subject matter expert (SME). The most challenging were the roles of advisor/mentor (28%) and course facilitator (23%).

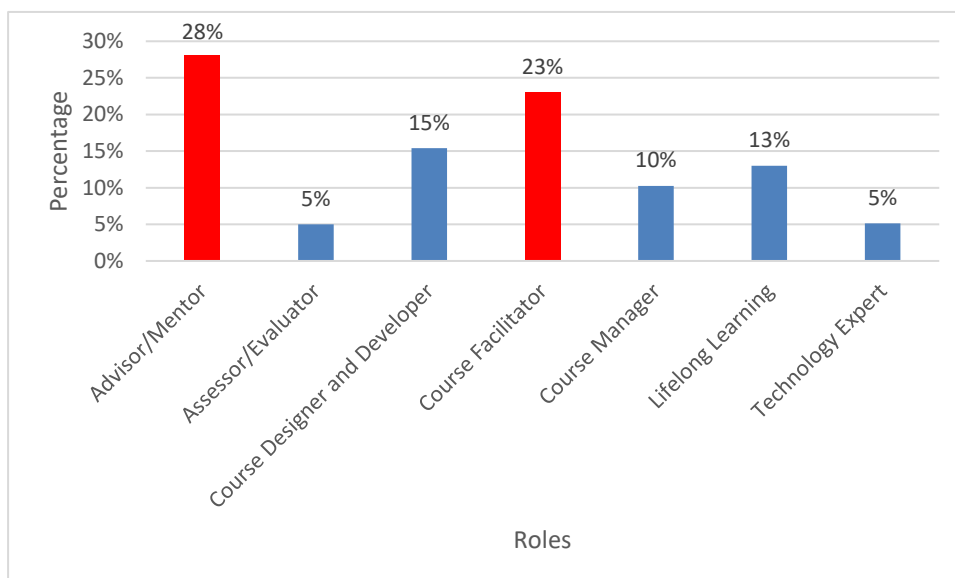


Figure 4.3: Perceived challenging roles

4.2.2.2 Analysis of the individual roles and corresponding competencies of private distance education educators

This section provides a more detailed analysis of each individual role and its corresponding competencies.

(i) Subject matter expert (SME)

As seen in Table 4.2, respondents perceived the role of subject matter expert (SME)

as the highest ranking ($M=4.54$). This finding concurs with the findings of Bezuidenhout (2015), Roberts (2018) and Martin et al. (2021), namely that educators perceived the role of SME as their most important role. As discussed in Chapter 2, several authors agree on the importance of the role of SME (Thach & Murphy, 1995; Aydin, 2005; Chang et al., 2014; Bezuidenhout, 2015; Roberts, 2018; Martin et al., 2021). 'Demonstrate content expertise' rated the highest in terms of competency ($M=4.71$) thus supporting the statement made in Chapter 2 that educators are primarily employed as knowledge experts in the modules that they lecture at the institution. Notably, the role of SME was also the only role the respondents found unchallenging (no comments were received for the open-ended questions 4 and 5). The SD also indicated that the variance was below 0.5 for all the roles and competencies except 'Collaborate with instructional designers' ($SD = 0.99$).

(ii) Course designer and developer

From Table 4.2 it is evident that respondents perceived the role of a course designer and developer as second to last ($M=4.13$). Bezuidenhout's (2015) study indicated the same result regarding the role of designer of subject material with $M=4.36$, as did the study of Martin et al. (2021), with an $M=4.25$. The SD also indicated a wide variance in responses. Furthermore, respondents rated themselves highest in terms of competency of all the roles ($M=4.37$) (Table 4.3). In the open-ended question 5, however, some respondents (15%) found the role challenging. In this regard, they expressed themselves as follows:

Respondent 17

Especially if you want to ensure that the course content is up to date and presented in such a way (on the Blackboard space) that students are eager to engage.

Respondent 9

Having to cover course content that is outdated or no longer relevant in the workplace or that you do not believe should be included in the module outline.

Respondent 26

You need to be updated all the time and come up with something innovative and engaging.

The statements made by the respondents correlate with the viewpoint of Hung and

Chou (2015:317) that well-designed learning environments allow students to take more responsibility for their studies by providing a deep and broad interaction with course materials (engaging).

(iii) Course facilitator

Table 4.2 indicates that respondents ranked the perceived importance of the role of course facilitator as third to last ($M=4.20$). Bezuidenhout's (2015) study indicated the same result regarding the role of facilitator of the learning of subject material ($M=4.28$), as did the study of Martin et al. (2021) ($M=4.30$). 'Hold online office hours however, has the lowest position in the role category and the 2nd lowest overall ($SD=0.26$). Respondents perceived themselves competent as a course facilitator ($M=4.13$); yet, in response to the relevant open-ended question, 23% indicated that they found the role challenging for the reasons indicated below:

Respondent 7

Getting the students to engage and the lack of personal connection via the screen means that you miss out on the nuances of a student's understanding and interactions that make teaching more simple and allow us to focus on the student's understanding.

Respondent 5

Getting students to understand time management.

Respondent 13

It requires an entirely different skill set from that of a contact lecturer. Understanding how to adjust one's practice to support the diverse needs of online students is a daily challenge.

Respondent 6

In my experience, distance learning is already challenging, and if there is a perception of micro-management, then it can create an uncomfortable environment which can make the learning even more challenging.

Respondent 12

Distance learning using technology is a cold medium and requires a great deal of instructor understanding and experience to engage with students and to ensure that students' focus is maintained.

Respondent 13

The profile of online students is diverse: within a single group, one will have students with different levels of work experience, age differences, comfort with teaching technologies and varying levels of confidence to engage in online platforms. This reality makes finding a suitable and equitable delivery method very challenging.

Respondent 7

We rely on subtle body language cues to ensure students' understanding. With distance learning, you are missing this element. Teaching something practical is difficult as you cannot see the immediate and natural non-verbal communication with your student.

Respondent 17

Any area where one is working in the distance learning space is challenging.

The statements made by the respondents correlate with evidence from the literature that traditional teaching techniques cannot simply be transferred to the distance education environment (Thach & Murphy, 1995:57; Briggs, 2005:257; Roberts, 2018:38) and that educators need assistance to clarify their new roles due to the difference between traditional learning environments and DE.

(iv) Course manager

As shown in Table 4.2, respondents ranked the role of a course manager last ($M=4.07$), however still above 4 on the Likert scale. Bezuidenhout's (2015) study indicated the same result with the role ($M=4.25$), as did the study of Martin et al. (2021) ($M=4.34$). The SD also indicated that the variance was high regarding the importance of the 'Resolve potential conflicts among students' ($SD=1.42$). Respondents perceived themselves as competent for the role ($M=4.02$). Yet, the role ranked second to last, for perceived competency (Table 4.3) and in response to the open-ended question, some respondents (10%) indicated that they found the role challenging for the following reasons:

Respondent 7

Monitoring student progress, the students can get away with not doing the work since it is more difficult to monitor.

Respondent 2

As a course manager, you are responsible for the success of the course. This includes talking to the students, facilitators and designers. Having all of this run smoothly takes good operational practices, good time management and a plethora of soft skills which cannot necessarily be taught.

Respondent 14

It takes so much time. And takes time away from what that lecturer is good at delivering, and the students, as a result – do not do enough.

The above remarks correlate with the lower rating of respondents' perceived competency regarding monitoring student participation (3.80.).

(v) Advisor/mentor

Respondents ranked advisor/mentor as the fourth most important role ($M=4.29$). Bezuidenhout's (2015) study indicated the same result with the role ($M=4.25$), as did the study of Martin et al. (2021) ($M=4.02$). The SD also indicated that the variance was high in terms of importance of 'Advise students on their professional development' ($SD=1.16$). Respondents generally perceived themselves as competent for the role ($M=4.15$, $SD=0.65$). Responses to the open-ended question, however, indicated that some respondents (29%) found the role the most challenging for the following reasons:

Respondent 32

Simply because there is no face-to-face interaction and we are all basically then strangers to each other.

Managing groups as learners are all from different locations. Also, motivating distance learners is very different to in class.

Respondent 16

Motivating students to engage with the resources provided. Some students only focus on assessments and not understanding of content.

Respondent 22

Ensuring that students constantly engage with the material (downloading the content). Students forget to login onto the school portal, and students do not often check

announcements.

Respondent 29

We cannot control the space environment in which students establish to set up or work from. Students at times select a work environment that is available to them at that time or which allows connectivity. These spaces sometimes do not offer effective learning opportunities due to disruptions such as noise or other distractions, which are all barriers to learning.

The statements made by the respondents correlate with Anderson and West's (2020) opinion that DE is changing the way in which students learn and can be very isolating. As such, students need to acquire new skills like persistence, self-regulation and motivation.

(vi) Assessor/evaluator

Table 4.2 shows respondents ranked the role of assessor/evaluator as the second most important ($M=4.40$). This perception supports Gravett and Geyser's (2004:91) view that assessment is the most powerful instrument available to educators for influencing students' learning. The SD also indicated that the variance was high in terms of importance of the 'Monitor individual student and group progress' ($SD=1.24$). Respondents perceived themselves as competent for the role ($M=4.30$). Accordingly, the open-ended question indicated that only 5% of respondents perceived this role as challenging, and no additional comments were made.

(vii) Technology expert

It is generally acknowledged in the literature that DE educators need to be technology experts (Thach & Murphy, 1995; Roberts & Bezuidenhout, 2017; Roberts, 2018; Martin et al., 2019; Martin et al., 2021). Respondents ranked technology expert as the fifth most important role ($M=4.21$). Bezuidenhout's (2015) study also indicated the role of 'online expert' as important ($M=3.68$), as did the study of Martin et al. (2021) ($M=4.32$). Respondents in the present study perceived themselves as competent for the role ($M=4.05$, $SD=0.08$). Roberts remarked in the study conducted in 2018 that the role of technology expert were perceived to become far more important in the future. The open-ended questions 4 and 5 indicated that only 5% of respondents perceived this role as challenging for the following reasons:

Respondent 10

Technological advances – not my area of expertise; I need IT staff to show me around until I understand well.

I like people more than technology; I love teaching and I see technology as a useful tool but not an end in itself. For me, the human being will always come before the machine, and this manifests in my lesser interest in technology.

(viii) Lifelong learner

Martin (2021:273) asserts that online educators are lifelong learners. It is imperative for online educators to learn since online environments and technologies constantly change. Also, educators need to reflect on their teaching and learning practices and explore new teaching practices (Martin et al., 2021:274). Table 4.2 shows respondents ranked the role of lifelong learner as the third most important ($M=4.31$). Bezuidenhout's (2015) study indicated the role as fairly important as well ($M=4.51$), as did the study of Martin et al. (2021) ($M=4.27$). However, respondents ranked the role last in terms of competency ($M=3.91$), while the open-ended question indicated that only 13% of respondents perceived this role as challenging, as shown in the following responses:

Respondent 4

Because there is ALWAYS something new to learn and often you have to learn how to do it in front of other people.

Keep abreast of changes.

4.2.2.3 Gap analysis between perceived importance and competency of roles

This section provides a gap analysis of the perceived importance of roles versus the perceived role competency.

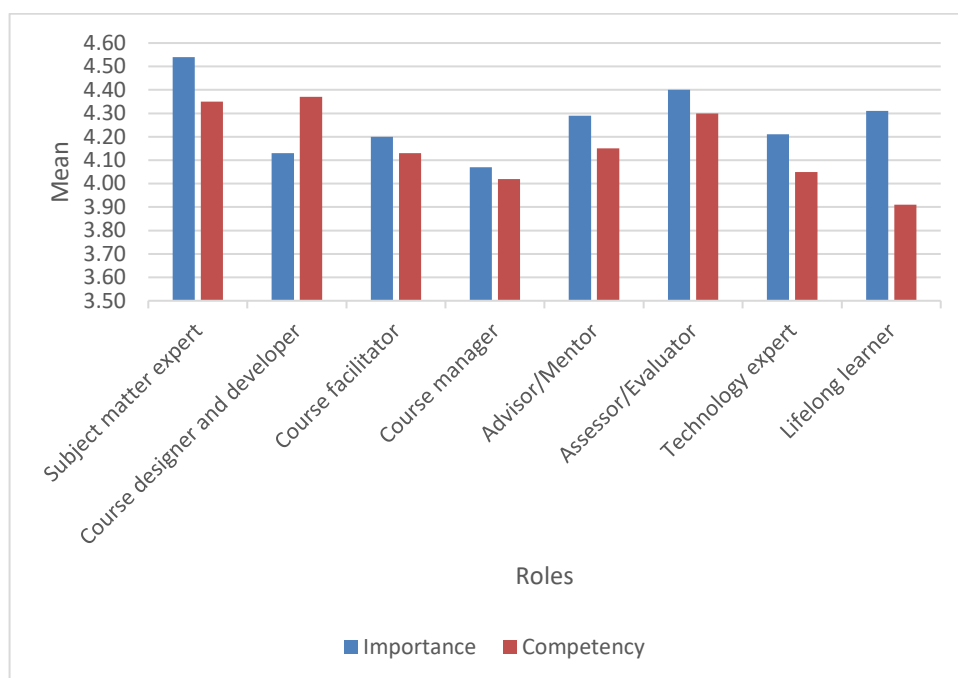


Figure 4.4: Ranking of perceptions of the importance of roles vs. perceived competency

As seen in Figure 4.4, the rank perceived importance was higher for all the roles compared to the rank perceived competence except for the course designer and developer role. A Mann-Whitney U test measured the differences in means between the respondents' perceptions of the importance of their roles versus their competence.

Table 4.5: Gap analysis between importance vs competency

Role	Importance mean	Competency mean	Mann-Whitney U test	
			Z	Asymp.Sig (2-tailed)
Subject matter expert	4.54	4.35	-1.36	0.173
Course designer and developer	4.13	4.37	-1.09	0.275
Course facilitator	4.20	4.13	-0.95	0.345
Course manager	4.07	4.02	-0.64	0.522
Advisor/mentor	4.29	4.15	-0.58	0.561
Assessor/evaluator	4.40	4.30	-0.58	0.560
Technology expert	4.21	4.05	-1.55	0.121
Lifelong learner	4.31	3.91	-2.32	0.020

As seen in Table 4.5 the test concluded that there was no statistically significant difference between the importance and competency roles results, except for the role of lifelong learner ($p\text{-value} = 0.020 < 0.05$).

4.3 Conclusion

The results of the quantitative web-based survey to determine the perceived importance of the roles and competencies of private online DE educators were examined and analysed in this chapter. First, the descriptive statistics regarding the experience results of the respondents were presented and next, the perceived importance of and competency in the different roles of private online DE educators were presented and discussed. In the next and final chapter, conclusions will be drawn and recommendations relating to the results of the research will be made.

CHAPTER 5

CONCLUSIONS AND POSSIBLE IMPLICATIONS

5.1 Introduction

The aim of this quantitative web-based survey study was to determine the perceived importance of the roles and corresponding competencies of private online DE educators. The aim of the study was achieved as evidenced by the research results and findings that were presented in Chapter 4. This chapter will commence with a discussion of the main research findings on the perceptions of private online DE educators regarding their roles and competencies. The perceived challenging roles of private online DE educators will also be considered. Subsequently, the limitations of this study will be outlined.

5.2 Discussion of main research findings

As mentioned in Chapter 1, the literature indicates that traditional teaching techniques cannot simply be transferred to the DE environment (Thach & Murphy, 1995; Briggs, 2005; Roberts, 2018). Educators need assistance in clarifying their new roles in order to address the challenges brought about by the differences between traditional learning environments and DE. The proposed study objective was to determine the perceived importance of the roles and corresponding competencies of private online DE educators. It is envisaged that the gathered information will form the basis for the future development of a framework for academic staff development in private online distance higher education.

5.2.1 Perceptions of private online distance education educators regarding the importance of their roles

The most important finding from this study was that private online distance education educators perceived all eight roles presented as important. The study adds to the gap in the existing body of knowledge regarding the roles and competencies of online DE educators in private HEIs. The descriptive summary of results obtained from the survey showed that the overall mean across the eight role categories was fairly

important (4) on the Likert scale. These results are consistent with findings reported by Bezuidenhout (2015) and Martin et al. (2021), who demonstrated correlations across all eight roles. The findings, therefore, indicate that the perceptions of roles and perceived competencies of DE educators are similar between public and private HEIs. The main difference, however, is the role of researcher included in the study by Roberts (2018) but omitted in the present study. The independent contractors at College A do not partake in any research outputs, but as this role is important in HEIs, PHEIs will hopefully be more involved in research in the future.

In the present study, educators perceived the importance of the roles in descending order as follows: subject matter expert, assessor/evaluator, lifelong learner, advisor/mentor, technology expert, course facilitator, course designer and developer, and course manager. Educators indicated that only three roles were not included that they perceived as important, namely a supervisor for postgraduate students, a plagiarism advisor, and a peer reviewer. These additional roles, which are included in the work of Bezuidenhout (2015), are valid contributions.

5.2.2 Perceptions of private distance education educators regarding their competencies

The overarching aim of the study was to determine the perceived importance of roles and competencies of private online DE educators, as mentioned in the previous section. Yet, due to its relevance for future academic staff development, it was also valuable to request educators to consider their perceived competency for the eight role categories. While Bezuidenhout (2015) and Roberts (2018), in the South African context, provided valid information for educators' roles, their studies focused on public and not private HEIs. The present study revealed that private online DE educators perceived themselves as competent in all the roles across all eight role categories, in descending order as follows: subject matter expert, course designer and developer, assessor/evaluator, advisor/mentor, course facilitator, technology expert, course manager, and lifelong learner, including the corresponding competencies.

5.2.3 Perceived challenging roles

The educators revealed that they found the advisor/mentor and course facilitator roles the most challenging. The role of advisor or mentor was perceived as challenging

because educators found it difficult to encourage students to engage with the resources and announcements on the LMS. Since DE students are also situated in different locations, educators indicated that motivation over distance was more challenging. In this regard, the following comment was made: “*Basically, we are strangers to each other.*” The role of the course facilitator ranked as the second most challenging role due to, yet again, difficulty in engaging with students. The statement was made that skills required to lecture in DE differ entirely from those required by a contact lecturer.

5.2.4 Perceived importance versus perceived competency

As mentioned previously, the central academic team is solely responsible for developing the formative and summative assessments across all the campuses for College A. Interestingly; the course designer and developer role was the only role ranked higher for perceived competence compared to perceived importance. A possible reason can be that educators want to be more involved in developing their course content. However, the role of a lifelong learner ranked higher for perceived importance than perceived competency. The lowest mean for this role was ‘engage in professional development on distance learning’ and ‘share and learn from peers about distance teaching practises’. This finding can indicate the need for part-time online educators to form part of a community of practice and lessen the isolation experienced.

5.3 Limitations

The limitations that could possibly have influenced the results of the study include the following:

5.3.1 The limited scope of the study

Researching DE educators at only one institution in South Africa means that the results cannot be generalised to all DE educators. However, my attempt serves as a starting point to determine the perceived importance of the roles and competencies of private DE educators to make recommendations for further academic staff development. Despite the limitations, the study did indeed reach this primary research aim.

5.3.2 Data collection instrument

SUNSurveys, an online self-designed, self-administered online instrument with Checkbox software, was used. Due to the Protection of Personal Information Act, I was not allowed to email the respondents directly but only via their campus line managers. The researcher was, therefore, not entitled to remind the respondents to complete the questionnaire.

It would have been beneficial if the timely completion of the questionnaire could have been encouraged, since it focused on the core elements of the research. However, most educators were under time constraints which made speedy completion difficult. Also, I could have asked in-depth questions about DE teaching, learning challenges, and development needs.

However, detailed responses to the open-ended questions were received, and timely completion of the survey occurred (the majority within the first three days). I am aware that the research is only a starting point to determine the roles and competencies of educators in distance education and that further qualitative research (one-on-one interviews with selected educators) is warranted to unpack educators' perceptions of their roles and competencies in DE.

5.4 Contribution

I agree with the statement by Ferman (2002:147) that most university lecturers are not trained teachers, hence their lack of knowledge regarding pedagogy. New academic staff are expected to engage in teaching and learning tasks without the educational qualification requirement in both private and public HEIs. My real-life experience is that new lecturers entering the system are often ill-equipped to deal with their new academic roles. Many private educators believe in the 'sink or swim' model of career advancement, and new academics often feel isolated. This is even more evident in the distance mode of education as educators may feel secluded in front of a computer screen with limited interaction with colleagues.

My lived experience as a manager in a PHEI was a lack of academic staff development to address new educators' teaching skills. The question, 'What are the perceived roles

required of distance educators in private higher distance institutions?’ arose in my endeavour to develop an induction programme for new academic staff. This research study provided a starting point by answering the above question to enable me to develop a framework for academic staff development in private distance HE. The results of the study may be utilised towards the development of an induction programme covering the eight academic roles and addressing the challenges faced by DE educators.

5.5 Recommendations for future research

Suggestions for future research are the following:

- A framework for academic staff development needs to be developed for private DE educators.
- Further qualitative research is needed to address DE educators’ challenges in their academic roles.
- The difference in roles between public and private DE educators needs to be determined.
- DE roles and competencies need to be continuously revisited and refined due to the dynamic nature of the online environment.

5.5.1 Perceptions

It is imperative to remember that the study includes distance educators’ perceptions, which may represent distorted viewpoints. It is possible that a variety of factors could have influenced their perceptions. It is, however, important to research their perception that creates their reality of the teaching and learning experience. Furthermore, self-report bias can also occur where educators can over-report or under-report their roles and competencies to be viewed as competent as possible.

5.6 Conclusion

As stated in Chapter 1, this study aimed to determine the perceived importance of the roles and competencies of private DE educators. The motivation, theoretical framework and research design for the study were briefly discussed in this first chapter, with ethical considerations and limitations to conclude. Literature was reviewed in Chapter 2,

defining distance education (DE) and the roles and correlating competencies of educators in a DE context. Chapter 2 also reviewed literature regarding the impact of COVID-19 on technology and outlined the institutional context of the study. In Chapter 3, the research paradigm and design were elaborated on, and the study's ethical and quality considerations were discussed. The survey results were presented in Chapter 4 by stating the experience results and providing an overview of the findings of the perceived importance and competency of the roles of private DE educators.

This chapter concludes the study by aligning the findings with the aim of the research. DE has been widely researched, but with limited focus on the roles and competencies of *private* DE educators. This study contributes to a greater understanding of the roles and competencies of *private* DE educators.

Lastly, this research study aimed to serve as a starting point to guide the researcher in developing a framework for academic staff development in private distance HE.

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Annexure A

DATA COLLECTION INSTRUMENT

WEB-BASED SURVEY QUESTIONNAIRE

Roles and competencies for distance educators employed by a private higher education institution

Definitions:

Roles: Major duties performed by distance educators

Competencies: Knowledge and skills that enable distance educators to produce outputs

A. DEMOGRAPHIC INFORMATION

1. How long have you been employed as a lecturer/educator?

<6 months
<1 year
1 year
2 years
3 years
4 years
>5 years

2. How long have you worked in the field of distance education?

<6 months
<1 year
1 year
2 years
3 years
4 years
>5 years

B. IMPORTANCE OF ROLES FOR DISTANCE EDUCATION EDUCATORS

3. Please indicate how **important** you believe the following roles and competencies are in your function as a distance educator.

1 = Not at all important

2 = Slightly important

3 = Important

4 = Fairly important

5 = Very important

Subject Matter Expert

- Demonstrate content expertise
- Stay current with research and theories in the field
- Contribute relevant content to course outcomes
- Collaborate with instructional designers to develop the course
- Ensure that the course content is accurate

Course Designer & Developer

- Establish learning objectives
- Develop learning activities
- Include existing instructional resources

Course Facilitator

- Create a welcome message (announcement, video)
- Check in with students frequently
- Help students develop self-regulated learning skills (time management)
- Host synchronous sessions if applicable
- Hold online office hours
- Use active learning strategies to engage learners
- Provide timely, and substantive feedback
- Foster interaction among students
-

Course Manager

- Monitor student participation
- Provide clear instructions to students
- Be responsive to individual student needs
- Enforce course and institutional policies
- Resolve potential conflicts among students
- Connect students with institutional support services

Advisor/Mentor

- Advise students on their academic development.
- Advise students on their professional development.
- Motivate the students to succeed.
- Guide students to be self-directed and responsible for their coursework

Assessor/Evaluator

- Use a variety of assessments (quizzes, projects)
- Align assessment to objectives and activities
- Assess students' work
- Monitor individual student and group progress

Technology Expert

- Ensure that students are comfortable in the learning environment
- Orient the students to the online course

Lifelong Learner

- Integrate best practices from research into distance teaching
- Engage in professional development on distance learning
- Share and learn from peers about distance teaching practices
- Keep pace with the advances in educational technologies

4. Please indicate your perceived **competency** for the following roles and competencies as a distance educator.

1 = No level of competence (no experience)

2 = Low level of competence (little experience)

3= Average level of competence (some experience)

4= Moderately high level of competence (good experience)

5= High level of competence (extensive experience)

Subject Matter Expert

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- Stay current with research and theories in the field
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- Engage in professional development on distance learning
- Share and learn from peers about distance teaching practices
- Keep pace with the advances in educational technologies

5. Have you ever taken on a role in a distance module other than the ones listed in the previous question? If so, please advise.
6. Which role/roles are, according to you, the most challenging?
7. Why is this role/s the most challenging?