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The Experiences of Adult Education Instructors Adapting to the Online Teaching and Learning Environment

Myra Baynton, Janet Groen, Jo-Anne Willment, and Lorraine Slater

Abstract

This case study tracks the narrative journey of four faculty women as they discovered ways to handle the transitional experience of moving from face-to-face classroom teaching into an online asynchronous adult learning environment. It is the intention of the study that, by documenting the experiences of these faculty, we will be able to provide recommendations that will assist and support other faculty beginning to teach in an online environment.

Literature Review

Higher education is rapidly expanding its outreach to students by increasing the number of courses being offered within the online learning environment. As a result, "the development of distance education technologies has created conditions that require faculty to adapt to a new way of teaching and communicating with their students" (Quinn & Corry, 2002, p. 1). Not only does distance edu-

cation technology require that new faculty learn how to use new technologies, it also requires a paradigm shift in how educators orchestrate the act of learning (Dillon & Walsh, 1992; Hassenplug & Harnish, 1998). As a result of this ongoing paradigm shift, studies this past decade have documented faculty's ability to adapt to and integrate the use of online technology within their practice. These include studies on the level of faculty participation (Betts, 1998), factors impacting faculty involvement (Quinn & Corry, 2002), and faculty adaptation to the use of educational technology (King 2002).

This study, while also exploring faculty's involvement in utilizing distance education technology, focuses more specifically on documenting the transitional journey faculty undergo as they adapt to instructing online. Many of the studies cited above were conducted after courses had been taught and experience had been garnered. However, these studies do not capture the dynamic nature of the learning journey faculty experience as they begin to navigate the transitional journey to becoming online instructors. This study, as it documents this transitional journey, is particularly informed by and builds upon the conceptual frameworks of Kleiman (2000) and Baynton (1992). Kleiman (2002) postulates that as instructors begin and move through their journey of instructing within the online environment, they undergo various stages: entry, adoption, adaptation, appropriation and invention. This is similar to the work of others (Salmon, 2000) in which online development stages are marked by benchmark experiences

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within each of the transitional stages (Willmet & Cleveland-Innes, 2002). The second model (Baynton, 1992) provides the basis for the exploration of factors that operate in and impact the teaching/learning environment. Specially, this model explores the dynamic interplay between competence, choice and support as learners navigate the uncharted waters of online learning.

Critical to the stages of adaptation to instruction within the online learning environment is the range of emotions instructors experience as they undergo this transitional journey. In addition to being informed by and exploring instructional adaptation stages, this study also documents the affective and learning terrain of the instructors, believing that these have a profound impact on the instructors' ability to effectively adapt to instructing within the online environment. Bridges (1991) states that as we experience change, either personally or professionally, we experience a profound transition as we deal with endings, chaos and new beginnings. Kuebler Ross's stages (1969), while dealing specifically with the transitional emotional journey of dying, have been more broadly applied to the range of emotions that are felt as people undergo the kind of dramatic change that the instructors within this study have been experiencing. Some of the emotions associated with the stages of denial, anger, bargaining, depression and acceptance, were experienced by the instructors as they made the change from face-to-face to online teaching. Finally, in addition to acknowledging the importance of the affect in adapting to instructing online, there is tremendous learning that the instructor undergoes throughout this journey. Adult learning principles, particularly transformational learning (Mezirow, 1991; Cranton, 1994, 1996), indicate that we travel through various stages as we work towards integrating online instructing into our practice. This study addresses a unique niche as it specifically examines the phases of affect, adult learning and instructional adaptation that new

online instructors undergo throughout this transition. Through the documentation of this journey, recommendations will emerge that will hopefully ease the transition of those that travel after us.

Method

The study used a qualitative approach to determine the experiences and strategies of the four women faculty. A qualitative study enabled these researchers the opportunity to "interpret their experiences, how they construct their worlds, and what meaning they attribute to their experiences" (Merriam & Simpson, 2000, p.98). Similarly, the qualitative paradigm focuses on "process, understanding and interpretation – rather than deductive and experimental" methods (Merriam, 1988, p.21). The approach chosen was the use of stories/narratives to document each of the researchers' experience. The implementation of the methodology involved 5 distinct phases. These are described below.

Phase 1: Exploratory Dialogue Conversations amongst the four researchers took place early in Fall, 2002. This first phase consisted of exploring, as a researcher-instructor group, the various experiences and perceptions of teaching by distance by the four faculty members. An open and trusting atmosphere was created and participants shared their stories in words. As perceptions, feelings, issues and experiences were described and exchanged, the potential for documenting these perceptions/experiences was recognized. This became a process in progress, as the dialogue occurred simultaneously with the researchers actually transitioning from face-to-face to on-line delivery. During this time, numerous questions, discussions and perceptions arose for each member about the way they saw themselves as instructors and the issues within which they coped in an online environment. The conversation evolved to exploring the possibility of documenting the process each faculty member went through in

order to capture the experiences and frame these within a qualitative research process. The implications for research (particularly how the perceptions may be useful to other faculty interested in online work) were also explored and decisions made regarding the most appropriate methodology.

Phase2: Individual Narratives This phase took place during December, 2002. The methodology chosen was narrative stories. The four faculty members each wrote a personal narrative story of their experience of teaching distance education. These narratives included the context of their online teaching experience, feelings about the experience, values and underlying assumptions about teaching/learning and online delivery, self-reflections of the experience, perceptions of distance education compared to the face-to-face classroom experience, needs, the role of colleagues in the process, perceived barriers, components that helped and hindered the process of teaching by distance and personal and professional assumptions and perceptions about distance education. Once completed, the narrative stories were then exchanged and circulated to each faculty member for individual reading.

Phase3: Thematic Analysis During January, 2003, the researchers read each of the narratives and extracted the common themes that characterized the stories. These themes were identified independently by each researcher.

Phase 4: Community Dialogue and Triangulation: In February, 2003 all four faculty members held a joint meeting. The primary purpose of this dialogue was to share the themes identified from the narratives. Other purposes included:

1. Identifying any remaining or outstanding issues related to the experience of teaching on-line not captured in the narratives.

2. Starting to develop a shared understanding/meaning of the themes from the narratives

This one and a half hour session was audio-taped and transcribed by an independent third party. To help reduce the risk of too insular and biased an approach to the narratives, the group requested an external resource to review the narratives/stories and extract themes. The external evaluator reviewed each narrative and various themes were extracted and documented. Feedback was given to the group by the external evaluator and the themes discussed.

Phase 5: Meta-Analysis/Documentation: After all the themes had been extracted by the external evaluator and the four researchers, several meta-themes were identified. This process took place during the month of March. The purpose of this phase was to consolidate all the themes that had been identified and to document global themes that characterized the process of adapting to the on-line environment. This was done by documenting all the extracted themes on cards and sorting them according to similarity and relationships. Statements with similar concepts, phrases, ideas and/or themes were grouped together until a manageable number of groups were identified. Each group was then examined for its major thrust and a name was assigned to identify that particular group as a meta-theme. Each theme was then documented and used in the interpretation.

Limitations

The qualitative approach used in this study limits the ability to generalize the findings. However, the purpose was to describe four women's experiences and not to attribute global generalizations.

Results

Introduction to the Research Participants

Four faculty members began the study in September, 2002 and continued to meet over the academic year. The team is composed of cross-faculty membership from the Faculties of Education and Continuing Education. All members are women serving on academic faculty at the University of Calgary. An introduction to each is provided below.

Participant One: *"While I was thrilled to be offered this full-time teaching opportunity at the University of Calgary, I was also nervous, especially about the online delivery. Some of technical issues concerned me, but I also had more basic questions as an adult educator. I have always thrived in the face-to-face teaching environment and loved creating and maintaining a facilitative and dynamic learning environment in this milieu. The type of community that almost always seemed to develop throughout the term was richly rewarding for myself and for my students. I wondered if I would be able to thrive as well in an online environment and would I be able to honour and live out my values as an educator within this online environment. I wasn't sure."*

Participant Two: *"I took a couple of interest courses through a televised-correspondence distance delivery in the early 1980's with positive results. In 1997 I decided to try again by learning more about online interaction. I informally arranged to work at-a-distance through a peer mentoring relationship with a senior woman faculty member with much experience in the online environment. We were teaching different sections of the same online graduate course. Over*

the four months of teaching, I questioned her about many aspects of the online process. I began to model, develop and "grow" my own instructional learning style for the online environment. This experience showed me how and why it is critically important for me to develop excellent online learning and teaching skills from my points of strength developed from my years of m my face-to-face teaching. This experience has led me to think critically about my teaching, to explore new horizons and to evaluate online teaching and learning in ways that open doors with online learners, with colleagues in the academy and within national organizations. These opportunities would not have developed without the collaboration and support of this critical learning experience. The online experience continues to be a passionate and profoundly personal and rewarding experience for me."

Participant Three: *"I taught the first course online from overseas, despite the technological, political and logistical problems that entailed. I felt very much alone in trying to develop the content, organize the sessions, and manage the software. I have learned that I need to achieve a certain level of comfort first before I am able to innovate. Once I can establish a sense of competence I am better able to establish effective communication with the students."*

Participant Four: *"I had never been involved in online course work as a student or as an instructor. I really did not know what to expect. How would I get to know the students? Would it be possible to establish an open and supportive community of learners that would support critical inquiry and exploration of issues? How would the*

students in the course perceive me? How would I establish "the sense of invisible instructor presence" that I had been told was vital in distance learning?"

Thematic Analysis

Based on the thematic analysis conducted by the external reviewer and the four researchers, the following seven key themes were identified.

1. Change

The instructors operated in and experienced contexts of change during the process, including major life changes such as re-location and/or career changes.

"With the doctorate nearing completion, I decided it was time to prepare for my own move from administration to faculty and began the planning process that would subsequently see me resign from the university ... I wanted to become a faculty member, in the distance education field, where I could use a learner-centered philosophy, and have the ability to interact with adult learners in an asynchronous way. "

2. Affect

The instructors experienced an affective component during the experience of becoming an online instructor. The range of emotions included fear, anxiety, apprehension, excitement, frustration, and a feeling of incompetence.

"The library technician taught me everything I needed to know as he wiped away my tears of anguish and frustration."

Bridges (1991) makes the link between change and affect by using the word *transition*. "Transition" is the

psychological process people go through to come to terms with the new situation. Change is external, transition is internal" (p. 3). Clearly, we were within transition as we experienced multiple change events, particularly the change event of teaching within an online environment.

3. Support

Three types of support were identified as being critical to the comfort level and effectiveness of the instructors: emotional support, collegial/mentoring support and technical support (i.e., software use, instructional design, and library resources).

"We sat together that day and that marked the beginning of a peer mentoring relationship that has been and continues to be invaluable to me on so many levels, particularly at the affective level; I don't think I would have done nearly as well this first term without this collegial and personal relationship."

"We needed a great deal of help; from how to upload files, to writing in Netscape Composer, to putting together icons for the various places within the Web Shell. The learning curve was huge."

4. Instructor Competence/Abilities

Certain instructor competences and abilities predispose the individual to choose and survive distance education. These include: risk-taking, willingness to try new things, ability to develop self-preservation techniques and wanting to be innovative.

"One of my assets as instructor is an interest in and willingness to try something new and different."

"I am not afraid of this opportunity because in many ways, this is what I have been doing in each new university position over the past five years. "

5. Time

On-line education takes more time to design, organize and deliver.

"Course development is set once it is in the students' hands; online teaching requires considerable upfront planning and organization."

"I had no idea how much time the re-designing of course took."

6. Political Context

Delivering distance learning happens within a political context. For example negative attitudes/perception of colleagues, family and society affect the instructors perceptions of themselves and online instruction.

"I have learned that several faculty members refuse to teach within the online environment. As a result, it is beginning to feel that the weight and the risk-taking work of this new challenge are resting on fewer and specifically newer faculty...The perceptions of family and faculty can often make me feel that I am on the second tier."

"Distance education continues to be seen by some, particularly traditional faculty, as a "second rate" education delivery system which some continue to hold against online faculty."

7. Learner Centered Philosophy

A learner-centered philosophy was a key perspective that was shared by all of the instructors.

"My goal as a teacher has always been to create a dynamic and responsive learning community based on mutual trust and respect amongst learners."

"I do not find it difficult to share control of the learning process with the learner and often feel that I learn as much if not more than they ... the distance learning process is characterized by interdependence among learners and instructor."

Discussion and Recommendations

The following discussion reflects broad themes that attempt to capture the essence of our inquiry and present the findings in a more global perspective. Specifically, this discussion relates to: (1) becoming an online instructor – the phases and stages of the journey; (2) building support systems – the institutional and personal support netting; and, (3) the relationship between instructor pedagogical philosophy and delivery technology. The discussion within these three main areas will conclude with implications for practice and further research.

Becoming an Online Instructor

The transitional journey continues for us as we move beyond our initial doubts, anxiety, and inexperience with technology to become distance educators who are discovering new ways to approach teaching and learning. It was not without trepidation that we pushed beyond our comfort zone of face-to-face instruction and ventured into the unknown of web-based education. Along the way, we have challenged our current boundaries, ways of being, and assumptions.

According to Mackeracher (1996) as we were undergoing the evolution to becoming online instructors, we were reworking our past model of reality as educators to make room for a

new reality; being an online educator. "Adults learning focuses primarily on modifying, transforming, and reintegrating knowledge and skills, rather than on forming and accumulating them as in childhood" (p. 37). She also states that as we undergo this revision of our self, the emotional aspects of learning can be tumultuous, as we are greatly attached to the values and beliefs that inform our sense of self. Clearly we were undergoing transformational learning.

As we underwent and continue to undergo this transformation learning we have been able to, through our conversations and as articulated in our findings, to come to a shared sense of meaning and understanding of the variables that have contributed to our growing sense of identity as distance educators. We were able to utilize the energy mobilized through our emotional responses, stress and anxiety and channel it effectively into learning and ultimately into success and satisfaction (Mackerarcher, 1996). We have all moved from novice inexperienced instructors on to an intermediate stage where levels of comfort increase and we are able to innovate and are willing and able to take greater risks. In addition, we are moving toward greater expertise in instructing within a learner centered online environment. The initial tumult of stress and anxiety appears to have subsided.

Mezirow states that as we undergo a transforming process of learning there often follows some variation of eleven phases of meaning becoming clarified. The first phases focus on such aspects as a disorienting dilemma, self-examination with feelings of fear, anger, guilt or shame, and a critical assessment of assumptions. While we underwent those phases, it appears that we have moved into the later phases of a transformational learning journey; provisional trying of new roles, building competence and self-confidence in new roles and relationships and finally, a reintegration into

one's life on the basis of conditions directed by one's new perspective. (Mezirow, 2000, p. 22).

As faculty undergo the transition to becoming online instructors, it is important to provide them with learning environments that provide for the possible emotional stress of undergoing this change. Learning supports, particularly the support systems discussed below, allow instructors the safe space to try new behaviors, to build mutual trusting relationships, to provide each other with supportive feedback and to ultimately increase the likelihood of success in becoming an online instructor.

Building Support Systems

The words: "I couldn't have done it alone" reflect our sentiments about our initial online teaching experience and reinforce the need for faculty and student support components that comprise the educational organization. Our stories tell of our depending on, learning from, and needing to work with others in developing and teaching course work online. As reported in our data, not only do faculty need support in acquiring a practical understanding of technology's strengths and weaknesses, strategies for their use, and skill in the art of course design, but they also require mentorship that supports them in their personal and professional pathway. Drawing from the current literature on mentoring, (Lick, 2000; Mullen, 2000;) the term co-mentoring could be used to describe the collaborative relationship that developed amongst the four researchers. Our experience together was based on a new vision of mentoring which sees mentoring moving from being a hierarchical pairing (Fullan and Hargreaves, 2000), to becoming a shared inquiry into practice based upon voluntary participation, equality, trust, need, common goals, shared responsibility and mutual learning (Cook and Friend, 1991; Stewart, 1996). Unfortunately, the rigid department structure of universities encourages low-faculty interdependence. It is

easy to feel alone when teaching a web-based course. It can be a solo rather than a collaborative pursuit. The findings of this study suggest there is a need for various support systems for new online faculty. This could help faculty respond to the implications for development issues that currently exist within the complex technical and administrative infrastructure of a university. Without the necessary commitment and support of the university and its various departments, it is unlikely that faculty will contribute the time and energy needed to move education into the online learning environment.

In addition to personal and institutional support, it is critical to have technical support throughout the all phases of adapting to instructing within the online environment, particularly within the initial phase. Lynch (2002) also has stressed the importance of faculty comfort with and proficiency in the use of technological communication tools such as e-mail, discussion boards as well as programs for synchronous participation. Although Lynch maintains that instructors might best acquire this technical knowledge and skill through participation in a faculty development course that is taught online, for these four researchers, ideal technological support includes a one to one coaching relationship with an instructional designer.

The Relationship Between Instructor Pedagogical Philosophy and Delivery Technology

The findings of this study indicate that all of us share a learner-centered philosophy of teaching and learning. Following a transformative rather than a traditional transmission model of teaching, our goal as instructors is to be facilitators of learning. In this vein, the responsibility of the instructor is to make learning an active rather than passive activity for students. One of the key challenges we experienced as

learner-centered instructors resulted from our struggles in discovering the technological boundaries of the online learning environment. This resulted in our conceptualizing the relationship between the online environment and the instructor philosophy as a dynamic tension and interplay.

As faculty, we too are adult learners. We participate more, and learn better when we have some ownership in learning goals or activities, that is, when intrinsic motivating drives of competence and connectedness are engaged (Mackeracher (1987). Although learners are given opportunities to learn, test, and work with faculty, unreasonable expectations about performance, tenure expectations, and workload demands can be placed upon adult learning faculty if they are not given adequate time, institutional support, and abundant instructional design assistance to learn how to make the “nuts and bolts” fit with the online teaching and learning environment. This has the potential of increasing faculty stress levels, raising frustration and anxiety when linked to deadline pressures, and may give rise to incidents of faculty burnout and unsettling academic workload complaints resulting in labour-relations problems (Moore, 2000).

While there is some debate in the literature about the disparate time and effort required for face-to-face courses compared to online courses (DiBiase, 2000; Visser, 2000), faculty new to online teaching and learning can benefit, as our study identified, from collaborative instructional support as they discover how to develop and deliver courses for distance learners. While some of this is done currently through learning about the online technology, “best practices” need to be identified by the faculty member to allow for personal styles, comfort levels and professional online teaching and learning strategies to develop. Studies focusing on establishing competencies and curricula for the distance education expert (Ally &

Coldeway, 1999) exist, and could be used to design online faculty teaching and learning programs that might address the goals above. While researchers in this study continue to meet in an informal support system to problem-solve and write about our experience, much could be done to realize greater competency, consistency, and supportive collaborative networks between faculty new to online teaching and learning. Further study is underway presently to explore how this might be done.

Implications for Practice and Research

The following suggestions are offered in order to ease the transition of new faculty as they adapt to instructing within the online environment:

- Instructors need a range of support systems to choose from as they learn how to instruct within the online environment such as: instructional design support, technical support, one to one ongoing coaching, and peer mentoring.
- Both ongoing departmental and university support need to be provided to instructors as a significant part of their professional development plan.
- The collaborative approach is recommended because it can provide instructors with the opportunity to exchange ideas, concepts and other strategies throughout the online development, teaching and learning process.

Finally, the following are possible directions for future research within this area:

- Given that this study explores the transitional journey of four women as

they adapt to instructing within the online environment, further research needs to explore and compare the transitional journey of male and female new faculty members as they adapt to instructing within the online environment.

- Future research should involve further conceptualization and exploration of the relationship between the instructor philosophy and the online environment.
- Further validation of this research is recommended by working with national and international distance education associations.
- The development of competencies for new online instructors – creation of these competencies in order to support new distance education instructors.

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