

**Discourses and Realities of Online Higher Education:
A History of [Discourses of] Online Education
in Canada's Open University**

by

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the degree of Doctor of Philosophy

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**DISCOURSES AND REALITIES OF ONLINE HIGHER EDUCATION:
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ABSTRACT

My dissertation research aims to develop a comprehensive account for the current state of online higher education beyond the common social and educational expectations about the adoption of online education.

Online education, according to dominant discourses in higher education, is commonly expected to (a) enhance educational accessibility to university education and (b) improve the quality of university instruction. And, this expectation further produces an imperative for its rapid adoption across all higher education institutions. However, my research fundamentally challenges these two rhetorical discourses, by providing an in-depth description of the disjunction between such discourses and the realities of praxis.

Drawing on key concepts from Michel Foucault and Mikhail Bakhtin, I trace the historical development of these two discourses as two institutional principles of openness and innovation in an open university. The complex relationships between the institutional discourses and peoples' practices, mediated by multiple factors are carefully addressed. My analysis reveals that multiple understandings of openness and innovation co-exist within the university, and members take different pedagogical approaches to online education according to their own understanding of those two principles. As a result, openness and

innovation often conflict with each other at the operational level, and the conflict is also visible within the ongoing struggles between instructors and learning designers, with regard to the adoption of a particular form of online pedagogical practices.

In summary, my findings demonstrate how the adoption of online education may introduce new problems and potentially oppressive power relationships among stakeholders in higher education, unlike the rhetorical claims that simply promote online education as a revolutionary solution for diverse social and educational problems. This disjunction continues to increase and is intensified by the existing instructional theory-practice gap in the academic field of online higher education. I urge that researchers and educators in online higher education as a united group, to make a collective effort to better understand and resolve the ongoing conflicts among the stakeholders and ultimately better serve our online students.

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CHAPTER 1

INTRODUCTION

Purpose, Problem, and Position

Through a Foucauldian conceptual lens, I explore how the current gap between instructional theories and practices in online higher education context has arisen in relation to the evolution of dominant social and educational discourses about online education. By perceiving theories not as neutral knowledge or universal truth but as historical and discursive products, I dive into the water and explore inside the instructional theory-practice gap considered as one instantiation of the discourse-reality disjunction. In other words, in this study, I regard the theory-practice gap as both *the result* and *the evidence* of the disjunction between the rhetorical dominant discourses and the realities of online higher education, which is a much more complex problem than the issue of how to apply theory into practice. It is worth emphasizing that although this study investigate the state of online higher education focusing on people's actual practices of online instructional design and teaching, it is not about how to improve the practices by more effectively implementing the theories. Rather, the main purpose of this study is to critically examine our current taken-for-granted understandings about online higher education largely based on the social and educational rhetoric of accessibility and the quality of online instruction.

1.1. Background: Expectations and Imperative of Online Education

With the growth of information and communication technologies (ICTs) online education has been generally perceived as a revolutionary solution to diverse educational and social problems. This perception has further produced an imperative to adopt online education across all education sectors. Particularly, in the higher education context, it is commonly expected that online education will enhance accessibility to university education as well as the quality of learning and teaching. Both such growing expectations and the technological imperative are clearly manifested not only in online education literatures but also in public documents (i.e., national reports, educational policies, institutional publications, and news articles). For example, the *State of E-learning in Canada* (Canadian Council on Learning, 2009) ambitiously claims that online education has the great potential to broaden

the possibilities for lifelong learning, by which Canada can prepare Canadians for the 21st century and so maximize its human capital and secure its future prosperity. The report summarizes the potential of ICTs for higher education as:

[ICTs] bring advantages to the learning process that are not readily available in other ways. The most prominent of these are more access to learning; better allocation of teaching resources; shared learning content; deeper learning; and a social component to learning. The learning potential of technology and the internet is evident and can provide one solution to the growing demand for post-secondary education and skills and training. (p. 13)

Three years later, another report, *Online learning in Canada: At a tipping point* (Contact North¹, 2012) reports that online education in Canada has reached a tipping point at the post-secondary level across the country, becoming an integral presence in higher education and now it can turn its focus to increasing the quality of online courses. As a part of the global trend towards perceiving online learning as critical to the development of post-secondary education, most Canadian institutions have begun to focus on increasing registrations, reach and success rates for their online programs, seeing it as core to their business plans for the future. Likewise, a series of survey reports about the status of online education in the United States (Allen & Seaman, 2013, 2014) clearly demonstrate the rapid growth of post-secondary level online course offerings and enrollments throughout both educational and business sectors over the last two decades. For example, 6.7 million students in the US were enrolled in at least one online course in 2012 and 7.1 million students in 2013, which is more than one third of all enrollments. It is evident that the online enrollments have been growing rapidly compared to a figure of only 3.5 million students enrolled in online courses in 2006 (Allen & Seaman, 2007). In addition, the continuing increase of online education is anticipated in the recent report based on other key findings such as 70.8% of academic leaders reporting online education to be critical to their long-term business strategy and 74.1% of academic

¹ Contact North, a non-for-profit corporation, has received the annual funding of \$10 million from the Government of Ontario through the Ministry of Training, Colleges and Universities since its establishment in 1986. It launched the Ontario Online Learning Portal for Faculty & Instructors in 2010 that has provided resources for post-secondary educators and helped them integrate technology in their teaching. Currently, this corporation supports public schools across the educational levels and the province to deliver programs and courses online.

leaders rating learning outcomes of online courses equivalent or superior to face-to-face learning outcomes (Allen & Seaman, 2014).

Online education in both Canada and the US has reached a tipping point in terms of a number of online courses and enrollments and it seems evident that adopting online education has become unavoidable if not actually imperative. Particularly in the current neoliberal political and economic conditions where government funding for public sectors has been shrinking, individual students are now perceived as “customers” exercising a free choice over educational service products, and student tuition has become the main funding source for the operation of universities and colleges (Giroux, 2014; Levin, 2007; Lewis, 2008). Thus, offering courses online to provide student “customers” with more accessible and flexible learning opportunities is not a matter of choice for post-secondary institutions anymore but an essential business strategy to generate income and maintain their institutional status (Contact North, 2012). On the other hand, however, the report suggests that there are major barriers to the development of online education in Canada including: a) the absence of broadband technologies in Northern Canada—Aboriginal communities in particular, b) the digital divide and the lack of digital knowledge of both some students and the professoriate, c) the poor design and quality of some online courses and consequently the low level of student engagement, and d) the lack of governmental and institutional investment in instructional design, faculty capacity and infrastructure. Thus, it concludes:

Given the demographics of Canada, its economic challenges and the competitive position of the nation, this [innovation depending on individuals and small teams] may not be good enough for online learning to make the contribution it could to the socio-economic development of the country. Key to the future will be more collaboration between institutions within Canada... expanding partnerships and alliances internationally, with Canadian institutions offering programs in partnerships with institutions from around the world.

The government of Ontario has recently established the Ontario Online Institution, a central hub for online post-secondary courses with a start-up budget of \$42 million (Bradshaw, 2014). The institution is currently preparing for the cross-institutional collaboration that will bring together all colleges, universities and other training networks to increase online learning opportunities for students in Ontario. Along with this initiative, Ontario’s Ministry of Training, Colleges and Universities proudly announced that *all* colleges and universities in

Ontario offer online learning opportunities to their enrolled students (over 18,000 courses and 1,000 programs available as of 2015) and continues to promote online education as a solution for any limited or unequal access to post-secondary education.

Even though it is unclear how those major barriers to the development of online education in Canada, discussed in the Contact North's report in 2012, have been removed or reduced, the growing number of online course offerings and registrations tends to be considered evidence for the increase of accessibility of post-secondary learning. In this thesis, however, I do not consider the simple increase of student enrolments in the post-secondary level of online courses as equivalent to, or demonstrating the increase of accessibility to university education. Inspired by John S. Levin's (2007) inquiry of *Non-traditional students and community colleges*, I utilize the concept of justice in his work—originally that of John Rawls' (1999):

By justice I mean a condition aligned with fairness and the equalizing of advantage so that prior conditions for individuals are recognized and accounted for in rights, privileges, and treatment that compensate for an individual's disadvantage. I borrow from John Rawls' concept of justice as fairness and his articulation of a well-ordered society that operates through social cooperation, under a social contract. I examine the actual condition of students in community colleges—institutions that I view as components of a well-ordered society—to understand these students and to ascertain how the institution treats these students. (p. 4)

Levin defines non-traditional students in higher education institutions as a disadvantaged population in respect of their economic status; social, linguistic, and cultural conditions; as well as in regard to mental or physical abilities. He also suggests that providing access to educational institutions is more than allowing the disadvantaged in. Rather, it means that institutions accommodate non-traditional students by recognizing their prior situations and meeting their needs, allowing them to actually benefit from their institutional experiences. In this perspective, the notion of accessibility, I would suggest, is neither value-free nor objective. Again borrowing Levin's (2007) terms, I will argue that to increase "authentic" accessibility to university education is to give post-secondary learning opportunities to the "have-nots" and to accommodate the special needs of the disadvantaged rather than to the "haves" who already possess access to university education (p. 1).

This approach to accessibility based on the concept of justice also has an important implication for my understanding of the quality of online instruction. That is, if it is to increase the authentic accessibility to university education, the quality of online instruction needs to be the same as (at least not significantly inferior to) the quality of face-to-face instruction so that online students can actually benefit from their online learning experiences. However, to make a more sound judgement about the quality of the current online instruction—and further analyze to what degree the great pedagogical potential of online education (or ICTs) has been fulfilled—we first need to know what the quality online instruction looks like. There are various components that affect the instructional quality of online higher education and instructional design theories and practices in online education settings have been influenced by multiple understandings of how people learn. Thus, the next section will briefly summarize different theoretical approaches to instructional design and learning practices in the field of online education.

1.2. The Evolution of Online Education and Instructional Models

How people learn has always been an important question in education because only if we know how people learn, are we able to teach them or effectively design their learning experiences (Bransford, Brown, & Cocking, 2000). The online education literatures largely follow a constructivist understanding of how people learn, which is the most popular current pedagogical perspective in other education contexts including K-12, higher education, and teacher education as well. Constructivist instructional models regard learning as “an active process of constructing rather than acquiring knowledge, and instruction is a process of supporting that construction rather than communicating knowledge” (Duffy & Cunningham, 1996). Constructivist learning theories are fundamentally based on this epistemological view about knowledge and knowing: people construct their own understanding of the world through interacting with their environments and creating meaning from personal experiences. When we encounter a new idea or experience, we either assimilate it into our existing knowledge or accommodate it by restructuring and developing our previous framework of understanding (Piaget, 1973).

However, not very long ago, behaviourist learning theories (e.g., Skinner’s programmed instruction) and cognitivist learning theories (e.g., Wittrock’s generative learning model) dominated educational contexts. Skinner

in his article, *The science of learning and the art of teaching* published in 1954, argued that programmed instructional materials should include small steps of desirable behaviour changes, ask frequent questions and offer immediate feedback, and allow for individual self-paced approaches. He also insisted that instead of aversive and oppressive behaviour control techniques (e.g., corporal punishment), which were predominantly employed in classroom settings at that time, teaching should utilize scientific methods such as a systematic analysis of learning and optimal arrangements of the contingencies of reinforcement to change and maintain behaviour. Later, Wittrock's (1992) generative learning model defined learning as acquisition of factual information rather than behaviours and suggested people learn new knowledge when it is meaningful to them by generating connections between the new information with their prior knowledge already stored in their long-term memory. According to this cognitivist learning approach, effective teaching provides a learning task meaningful to individual learners and carefully organizes and presents materials as proper chunks in a proper order from simple to complex, and building on prior memory.

Early scholars in distance education² (e.g., Charles A. Wedemeyer and Michael G. Moore in the US, Börje Holmberg in Sweden, Otto Peters in Germany) were exclusively concerned with an instructional model of independent correspondence study augmented by different communication media (e.g., telephone tutoring). Because learning in the correspondence programs is fundamentally an individual process initiated by knowledge-transmitting or broadcasting activities, it is often associated with behaviourist-cognitivist learning theories (e.g., Anderson & Dron, 2011; Jonassen, Davidson, Collins, Campbell, & Haag, 1995). However, the original DE instructional models devised in 1960-70s did not originate from the popular behaviourist paradigm of that time. Instead, many of the critical elements of the early DE models emerged based on the unique and inherent characteristics of DE practices.

For example, although the forms of DE are varied across diverse educational levels and contexts, there are two shared elements in most DE practices that distinguish DE from conventional face-to-face education

²A predecessor of online education. Hereafter, distance education refers to as DE

(Schlosser & Simonson, 2010). The first component is the separation of teacher and learner and the second is the use of technological media to unite teacher and learner and deliver learning content to learners (Moore, 1973; Keegan, 1980, 1996). In this particular form of education in which teaching and learning are not directly linked to each other, all learning materials and activities need to be carefully planned, organized, and clearly presented. Therefore, Peters in the mid-1960s developed an industrial production model, which was perceived as very suitable to DE contexts and so taken up as an organizational model of most of the DE institutions including the Open University of the United Kingdom (Garrison, 2000). Peters believed that DE production and industrial production are compatible and so he applied the industrial production techniques (e.g., division of labour, mechanization, mass production, economies of scale) into the production structure and process of DE materials to increase both cost-effectiveness and teaching-effectiveness. Peters' perception about distance teaching and instructional design is well represented in the following excerpt from one of his early writings:

In distance study the teaching process is based on the division of labour and detached from the person of the university lecturer. It is therefore independent from a subjectively determined teaching situation... The division of labour and the objectification of the teaching process allow each work process to be planned in such a way that clearly formulated teaching objectives are achieved in the most effective manner. Specialists may be responsible for a limited area in each phase... The division of labour is the main prerequisite for the advantages of this new form of teaching to become effective... If, for example, the number of students enrolled on a distance study course is high, regular assessment of performance is not carried out by those academics who developed the course. The recording of results is the responsibility of yet another unit; and the development of the course itself is divided into numerous phases, in each of which experts in particular fields are active. (Peters, 1967)

In addition, distance learners in the early correspondence programs were mostly non-traditional adult students with a limited access to face-to-face higher education, that is, a disadvantaged population. Therefore, many of the critical elements of the instructional models for the correspondence programs (e.g., autonomy, dialogue, structure) were borrowed from a more pragmatic approach to learning and instructional design in adult education rather than behaviorist-cognitivist learning theories (Anderson, 2013; Moore, 2013). Different from those learning theories, Wedemeyer's (1981) independent study model emphasized student-centered or self-directed learning and Holmberg's teaching-learning conversations model—originally a guided didactic

conversation model—emphasized relational qualities such that “feelings of personal empathy and personal relations between learner and teacher support motivation for leaning and tend to improve the results of learning” (Holmberg, 2007, p. 69 as cited in Diehl, 2013, p. 42). Building upon Wedemeyer’s independent study model, Moore (1972; 1973) developed the theory of transactional distance, which illustrated the relationships between three instructional components: course structure, teacher-learning dialogue and learner autonomy. According to the model, DE can provide both behaviourist-cognitivist learning experiences (more distance: more structure-less dialogue) and constructivist learning experiences (less distance: less structure-more dialogue) according to the degree of transactional distance (Moore, 2013).

Although several technologies (e.g., TV-Radio) had been introduced and utilized to augment the teaching-effectiveness of DE programs, DE practices remained largely as independent correspondence study based on the industrial production model until the 1990s. During the period of the 1990s-2000s, there was an important pedagogical change in general education contexts: a move from cognitivism to constructivism (Bruner, 1986; Piaget, 1973, Vygotsky, 1978). This transition is mostly explained with respect to an epistemological or philosophical shift from objectivism to constructivism (Jonassen, 1991; Phillips, 1995; Swan, 2005; Vrasidas, 2000). Whereas objectivists believe that the world is structured and knowledge is objective and external to the knower, constructivists argue that the world is constructed in each individual’s mind and knowledge is subjective. Social constructivists (e.g., Vygotsky, 1978) and learning theorists on the basis of this epistemological stance (e.g., Lave & Wenger, 1991; Wenger, 1997) particularly argue that knowledge is constructed through social interactions so that learning is not an individual but a social practice (Swan, 2005; Oztok & Brett, 2011).

The development of ICTs (i.e., computer networking technologies) had further facilitated the theorizing of how to design social constructivist learning experiences or instruction in Internet-based DE or online education contexts (Harasim, 2000; Hillman, Willis, & Gunawardena, 1994; Jonassen et al., 1995; Paavola, Lipponen, & Hakkarainen, 2004; Tam, 2000). According to the authors (Jonassen et al., 1995), social constructivist learning environments “engage learners in knowledge construction through collaborative activities that embed learning in a meaningful context and through reflection on what has been learned through conversation with other learners” (p.

12). Thus, instructional designers need to focus on developing an interactive and collaborative learning environment rather than controlling learning behaviours and outcomes through prescribed instructional sequence and interventions (Swan, 2005; Bransford, Brown, & Cocking, 2000). For example, Garrison and Anderson (2003) proposed a *Community of Inquiry* model including three key factors (i.e., cognitive presence, social presence, teaching presence) that need to be carefully considered when planning and designing online learning. This model does not suggest a prescriptive or procedural approach to instructional design or teaching but identifies particular instructional strategies and teaching behaviours that may foster the development of community among learners (Anderson, Rourke, Garrison, & Archer, 2001).

In this context, researchers had begun argue that with new ICTs and networking tools, it became possible to innovate and transform traditional DE to follow the social constructivist model of online education:

A [social] constructivist approach to knowledge construction and learning, we believe, can be well supported in distance education settings through a variety of technologies. Technology-supported environments—computer-mediated communication, computer-supported collaborative work, case-based learning environments, and computer-based cognitive tools, for example—can offer the field of distance education alternative approaches to facilitating learning. These constructivist environments and tools can replace the deterministic, teacher-controlled model of distance instruction with contextualized work environments, thinking tools, and conversation media that support the knowledge construction process in different settings. (Jonassen et al., 1995, p. 14)

1.3. Problem: The Theory-Practice Gap in Online Education

Despite the rapid development of social constructivist instructional design theories, it is often claimed that many online courses continue to use traditional behaviourist or cognitivist learning approaches, which do not provide learners with collaborative learning opportunities (Contact North, 2012; Herrington, Reeves, & Oliver, 2005). Much research has been devoted to designing and developing more interactive learning environments and facilitating learner discussions and collaboration in those environments (Hughes & Daykin, 2002). However, it seems like our efforts to apply those theories and research results to actual online education practices has not been very successful except for those in literatures that demonstrate the effectiveness of social constructivist online learning.

Of course, this theory-practice (often research-practice) gap is neither a new nor exclusively an issue for social constructivist learning theory and online education practice (for examples in other educational fields, see Biesta, 2007; Brockett & Hiemstra, 1985; Cheng, Cheng, & Tang, 2010; De Corte, 2000; Nuthall, 2004). However, the claim tends to be more salient in online education contexts than other face-to-face situations because this gap is perceived as a serious failure to make effective use of ICTs (Herrington, Reeves, & Oliver, 2005). In addition, compared to face-to-face classrooms, it may be much easier for researchers to gain access to online courses and then observe instructional activities and analyze learner interactions in the courses. In this context, the perceived gap has been continuously growing between the reality of online education and the rapidly developing scholarship that focuses on realizing the educational potential of ICTs for collaborative learning (e.g., Computer-Supported Collaborative Learning in Stahl, Koschmann, & Suthers, 2006; Makos, Lee, Zingaro, 2015).

This dissertation project was initially motivated by my personal desire to better understand this theory-practice gap in online education in order to ultimately reduce the gap and increase the quality of online higher education. Most studies with similar concerns in online education have focused on different factors that influence the adoption of online education (e.g., Chen, 2009; Green, Alejandro, & Brown, 2009; Keengwe, Kidd, & Kyei-Blankson, 2009; Li & Lindner, 2007; Oomen-Early & Murphy, 2009; Tabata & Johnsrud, 2008; Wang & Wang, 2009). Many of these researchers have attempted to identify barriers to effective adoption of online education and provide general suggestions to remove these barriers. One of the most frequently identified barriers is faculty members' unwillingness or resistance to change their pedagogical practices or their lack of technological skills or pedagogical knowledge. So it has been often suggested that institutions provide incentives to those who are willing, and at the same time, offer professional development opportunities and instructional design assistance to those who are lacking in such abilities or knowledge.

At the same time, another group of researchers (e.g., Battalio, 2007; Elloumi, 2004; Kanuka & Brooks, 2010) have discussed the relationship between the pedagogical qualities of effective online instruction (e.g., interactivity or flexibility) and other principles regarding effective online instructional design and development (e.g., accessibility, efficiency, cost-effectiveness). They have illustrated the possible conflicts between those

qualities and principles and concluded that it is difficult to satisfy all of them in a single online program so that the gap between instructional theories and instructional activities applied in actual practice may be unavoidable. All these findings suggest that the growing expectations of online education in terms of its accessibility and instructional quality have yet to be successfully demonstrated in higher education contexts. Particularly, in order to increase authentic accessibility (Levin, 2007) to university education through online education, I argue, non-traditional students, who otherwise do not have access to post-secondary education, need to demonstrably benefit from their online learning experiences. Not only the quantity of online courses but also the quality of online instruction has to be guaranteed by accommodating the needs of the non-traditional students, which are likely to be different from those of traditional students. Based on this justice-oriented assessment of the quality of online education, therefore, the current failure to implement (social) constructivist instructional theories into online instruction further suggests the failure of online education to achieve its social mission and assertions like, “online education increases accessibility to post-secondary learning” or “online education improves the quality of post-secondary instruction” are rather rhetorical than actual.

Although the previous studies certainly suggest some invaluable and critical perspectives on the rhetoric, they offer little insight to the degree to which the pedagogical potential of online education has been fulfilled in the current higher education context where online courses and enrollments have dramatically increased. Nor do they fully explain how and why it is difficult to implement (social) constructivist instructional theories into actual practices. Furthermore, it is still unclear what happens when different principles—regarding the effectiveness of online education such as interactivity, accessibility, and efficiency—conflict with each other in an online education institution and how the conflicts are perceived by its members and resolved by their instructional design or teaching practices.

It can thus be argued that we have not yet developed a comprehensive understanding of the complexity of the disjunction between the rhetoric and the actual and at this moment, we are witnessing how the rhetoric—our expectations about online education—has become the doctrine we pursue to further produce the imperative of providing online education across all post-secondary institutions including residential universities. Although there

are also questioning voices challenging the social press of this rhetoric and some growing scepticism over the realization of these expectations, we can neither effectively question this seemingly inexorable shift to online education nor slow it down without deconstructing our current perspectives. To address this problematic, for this dissertation project I conduct an in-depth analysis of the instructional theory-practice gap in online education addressing the broader concern of increasing authentic accessibility to university education. The initial question directing this inquiry is: “How and under which conditions has the instructional theory-practice gap arisen in online higher educational context?”

I have approached this inquiry using a Foucauldian conceptualization of theory, that is, disciplinary knowledge. To Foucault (1980), knowledge is not objective universal truth but subjective historical product created within dominant discourses in a particular society. The production of legitimate knowledge involves complex disciplinary relations, interests, and practices that are largely regulated by the dominant discourses (Foucault, 1972). Different discourses produce different *regimes of truth*, therefore, the same piece of knowledge, commonly perceived as universal truth in our culture—normally in the Western culture—can be legitimated as well as illegitimated according to which regime of truth is dominant at that historical moment. The legitimate knowledge influences and controls people’s perceptions and practices at a certain institution, through which it further reinforces the dominant discourses. Based on this particular approach to understanding the reciprocal relationship between knowledge and discourses, the dominance of (social) constructivist instructional theories in a current online education regime needs to be perceived as a discursive product instead of being taken-for-granted as scientific truth. Thus, why, how, and in which conditions our current understandings of effective online higher education have developed needs to be carefully examined in relation to the bigger social and educational discourses prevailing in higher education.

Discourse is a commonly utilized concept, but defined in differing ways across multiple disciplines including linguistics, sociology, philosophy, communication studies, cultural studies, and educational studies (Hook, 2001; Mills, 2004). Foucault’s approach to discourse can be distinguished from a more general linguistic approach that focuses on analyzing language at the conversational or dialogical levels. For this project, James

Paul Gee's (1996) two definitions prove useful for clarifying the distinction between a Foucauldian approach to discourse in contrast to a general linguistics approach. Gee (1996) distinguishes *Discourse* (with a capital D) as referring to a particular way of believing, thinking, behaving and interacting among specific groups of people; he uses *discourse* (with a lower-case d) as a linguistic component at a conversational or dialogical level.

My use of the concept of discourse is closely connected to Gee's notion of Discourse: that is, taken-for-granted assumptions or beliefs, which are shared among people in contemporary society or a particular community. In this sense, the Discourses—for my thesis, Discourses regarding online education or distance education—represent continuously changing social norms and beliefs. Thus, Discourses can only be analyzed and understood in the historical context of their emergence and development; as Foucault's analyses demonstrate, the focus includes the histories of Discourses (e.g., Foucault, 1985, 1990, 1995) as well as the forms of the Discourse itself (e.g., Foucault, 1970, 1972). Further, the definition of discourse in this thesis does not follow the common use of the term discourse in much online education literature, where it is used largely to refer to communication (mostly written discussions in online forums) between learners (see Xin & Feenberg, 2006), or to a specific linguistic product of human interaction.

Most theorists influenced by Foucault understand discourses not as neutral representations and communications but rather as political, regulative, and ideological forces closely linked to Foucault's analyses of power and knowledge (e.g., Coloma, 2011; Hook, 2001). However, Foucault also uses the term discourse in at least three different ways as he explains:

Instead of gradually reducing the rather fluctuating meaning of the word 'discourse', I believe I have in fact added to its meanings: treating it sometimes as the general domain of all statements, sometimes as an individualizable group of statements, and sometimes as a regulated practice that accounts for a number of statements. (Foucault, 1972, p. 80 cited in Mills, 2004, p. 6)

The first definition has the broadest meaning and Foucault uses this definition in his theoretical and conceptual works. It refers to "all utterances or texts which have meaning and which have some effects in the real world" (Mills, 2004, p. 6). Therefore, this general definition is used for discourse as a whole when I explain the

relationships between discourse and other Foucauldian notions including knowledge, power, and resistance in Chapter 3.

The second definition of discourse refers to a collective group of utterances or texts about a particular subject or object that have certain influence on the way that people act and think. Mills (1997) explains that discourses consist of “groupings of utterances or sentences, statements which are enacted within a social context, which are determined by that social context, and which contribute to the way that social context continues its existence” (p. 11). The distinction between utterances (or texts) and statements can be useful here: “Statements are for [Foucault] those utterances which have some institutional force and which are thus validated by some form of authority—those utterances which for him would be classified as *in the true*” (Mills, 2004, p.55). Among different discourses, dominant discourses that consist of authorized or sanctioned statements have more regulative power and effects upon people, whereas other less dominant discourses, (e.g., a group of unauthorized or unsanctioned utterances), have less power and effects.

The third definition of discourse explains the rule-governed mechanism of discursive practices that produce knowledge-power effects in a particular institution. However, this definition tends to be less clear than the first two definitions of discourse and it does not have a practical and independent meaning. Because I do not believe that it adds any significantly important meaning to the first two, I do not use the term discourse with this definition in my thesis. Most discourse theorists use these three definitions interchangeably in their works due to the close interconnectivity among the definitions (e.g., Comber, 1997). In this work as well, it is almost impossible to definitely adhere to a single definition; nevertheless, I generally follow Foucault’s second definition, thus in most parts of my thesis when I discuss a specific discourse of (or about) a particular theme in countable forms—a discourse or discourses—I refer to the second definition. I further utilize several more specific notions such as dominant, residual³, and rhetorical discourses in different locations of this thesis in order to clarify to

³ Raymond Williams (1977, p. 122) notes: “The residual, by definition, has been effectively formed in the past, but it is still active in the cultural process, not only and often not at all as an element of the past, but as an effective element of the present” and the presence of the residual as part of the dominant can be demonstrated by “active manifestation of the residual” in today’s discourses.

which discourse(s) I refer. In addition, according to the level of my analytic foci, I often separately used other distinctive terms including academic discourses, institutional discourses, and personal voices, which will be explained more in detail in Chapter 3.

Despite the growing popularity of both (social) constructivist instructional theories and computer networking technologies in online education, they are still in their infant stage compared to the maturity of the instructional theories and technologies used for correspondence education, which had developed throughout the long history of DE (see Chapter 2). Considering that early DE scholars were exclusively concerned with the independent correspondence study model mainly for non-traditional students as well, I decided to situate my historical inquiry of the current instructional theory-practice gap in online higher education in the broader field of DE. Among diverse online higher education contexts (e.g., residential university, corporate training context, online education institutions, MOOCs, etc.), it made the most sense to choose an open university where traditional DE programs have recently moved online. Unlike residential universities where only a small group of faculty have participated in online education practices, or newly established online education institutions where faculty have relatively new distance teaching experiences, many faculty in open universities, with a relatively long history of DE, have experienced radical technological and pedagogical changes as their institutions moved from DE to online education. Looking into a history of online education in open university, I believe, enables us to develop a more comprehensive understanding of the complex relationships between the new theory and the old practice.

I hope this dissertation ultimately advances our understanding of online education beyond the current doctrinal rhetoric and suggests useful implications for online education researchers, practitioners, university administrators, and higher education policy makers concerning with providing non-traditional students with the authentic accessibility to quality university education. More detailed research methods are described in Chapter 3 while the last part of this introduction chapter briefly introduces my ontological stance as a researcher and the academic journey that led me to this dissertation study.

1.4. Position of Researcher

1.4.1. A Ontological Stance: Being an Objectivist Observer of Distance Education at a Distance

In this analytic project, I followed a methodological approach of intentionally distancing myself from my own field so as to observe what has been happening there as objectively as possible, following the process described by French philosopher Pierre Bourdieu (2000). As he states:

When I uncompromisingly examined the world to which I belonged, I could not but be aware that I necessarily fell under the scrutiny of my own analysis, and that I was providing instruments that could be turned against me... I have always asked of the most radically objectifying instruments of knowledge that I could use that they also serve as instruments of self-knowledge, and not least knowledge of myself as a 'knowing subject'... enabled me to explore some of the most obscure areas of my subjectivity as an objectivist observer. (Bourdieu, 2000, p. 4)

Bourdieu (2000) approaches his own field of philosophy as *an objectivist observer* at a distance in his critical analytic work on the academic field of philosophy. To him, who had been so long involved in, and related to, the academic practices and culture of the field—*Habitus* to use his term—it was a challenging project to examine “the logic of practices” in his own field and detect the contradictions in the logic (Bourdieu, 1993, p. 271). *Habitus*, one of his important concepts is defined as a “conditioned and conditional freedom” of a researcher in a particular field, which generates “things to do or not to do, things to say or not to say, in relation to a probable ‘upcoming’ future” (Bourdieu 1990, p. 53). His research aims at investigating the *habitus* in the field of philosophy by mapping the conditions of philosophers’ perceptions and their practices (e.g., regularities or possibilities) in the field.

Thus, an intentional effort to maintain a critical perspective on one’s own field is required to be an objectivist observer. It is important to note that Bourdieu uses the term “objectivist” here not as positivist epistemological claim but as a way to emphasize the challenging nature of becoming critical of the self-knowledge that has been self-evident through one’s historical relations with an academic field. In this discourse analysis project, therefore, Bourdieu’s approach has been taken up as a strategy of questioning dominant discourses and taken-for-granted understandings about DE and online education that I had earlier accepted as part of my self-knowledge as a subjective, non-reflective, and so uncritical participant in the field of DE.

1.4.2. The Researcher

I first want to introduce the author of this thesis: how I have become concerned with the instructional theory-practice gap in online education, how I have asked these particular research questions, and how and why I have taken up a Foucauldian analytic lens. Just like an historical understanding of DE would improve our analysis of the status of current online education, a historical understanding about the researcher and how I have developed and changed my research questions may enhance our reading of my work.

A Student, Instructional Designer, and Teacher Educator

In 2001 when I entered the bachelors' program of Educational Technology in South Korea, it was around the time when online education scholarship based on the development of ICTs and constructivist learning theories was rapidly emerging. Throughout the four year of university education, I was naturally engaged in many discussions on how to use different technologies (e.g., TV-Radio, Computer, the Internet) to improve pedagogical practices, how to design instruction in different educational settings, and how to design and facilitate student-centered constructivist learning activities. My first professional job as an instructional designer in a Human Resources Development department of a large Korean company provided me with rich opportunities to design, develop, and implement employee training programs mostly face-to-face. I designed programs using Project-Based Learning (PBL) and Community of Practice (CoP) models considered as constructivist instructional theories. Throughout these years, I was an active student, competent designer, and enthusiastic adult educator and I felt that I could accomplish anything I put my mind to.

In 2007 I started my master's program of Educational Technology in the same department where I earned my bachelor's degree. For the two years, I worked as a research assistant at the Center of Teaching and Learning at my university and participated in innovative pedagogy and technology diffusion projects. Along with planning and organizing professional development programs for faculty members, I closely interacted with a number of individual professors in different disciplines to implement constructivist instructional models and ICTs in their courses. To support their new and unfamiliar teaching experiences, I even participated in economics and medical courses as a TA! Through these in-depth and rewarding collaborations with faculty members—who volunteered

and were willing to redesign their courses—I became very interested in teacher education and faculty development. My very first scholarly article, *Why do professors refuse to use constructivist teaching methodologies?* (Lee, Yoo, & You, 2009) demonstrates this interest. However, this article is not any different from other scholars' works that approached faculty's unwillingness to change their pedagogical practices as a barrier to the adoption of innovative educational practices.

Throughout my master's program, I also worked as an instructional designer and a tutor for an online institution. By the time I finished my master's thesis titled, *Developing a framework to design an e-PBL course in a Computer-Supportive Collaborative Learning (CSCL) environment*, I received the title of e-learning specialist at the largest company in Korea. There, I was able to participate in much bigger collaborative educational design projects—I designed learning management systems, online curricula and courses, and mobile learning content. I particularly learned a great deal from the online course design experiences. As a project leader I led a small course development team including subject matter experts, instructional designers, programmers, and visual graphic designers. One of the lessons that I learned was that instructional designers in higher and corporate education contexts have limited power but limitless constraints on our design practices including budget issues, client needs, organizational systems, structured workflow, etc. I was specifically asked to develop the online courses using non-constructivist instructional models and interactive courses were often understood as having a lot of learner mouse-clicking activities and automatic feedback features. There was no room for me to use any of my CSCL knowledge in the pre-packaged online tutorials and to make it worse I—being involved in five course development projects at a time—was too busy to even think about this issue. One day, I found myself adding short video lectures, which is nothing to do with constructivism, in each tutorial unit and saying that this is the most effective thing I can do!

The radical discontinuities between the constructivist instructional theories that I learned, and even contributed to, and my online course design experiences made me lose trust and interest in CSCL research, which I truly realized was not realistic enough. When I was first developing my doctoral proposal, therefore, I decided not to do CSCL research but something more useful, practical, and applicable in actual education settings. I shifted my attention from *the utopian ideals* of CSCL, that largely originated from laboratory-like research

contexts free from most real-life constraints, to *the actual experiences* of online educational practitioners (e.g., instructional designers and instructors) within a real higher education institution.

An Online Education Researcher using Foucault

At OISE where online education scholarship is located in a large graduate program of *Curriculum Studies and Teacher Education* I have experienced a radical perspective transformation. Originally coming from a pragmatic epistemological base of instructional design in the corporate setting, I unavoidably encountered multiple new perspectives in this academic space in which different and often opposing epistemological understandings of education and research coexist. I became genuinely curious about the critical frame of reference that helped me explore the new circumstances where I, an international student speaking English as a second language, fall outside of the dominant cultural group. Enjoying my peculiar privilege, positioned between pragmatic and critical scholarships, as a marginalized voice in both groups during my doctoral studies, I freely explored different philosophical and sociological approaches to educational research. I was also slowly becoming engaged in critical discourses about power and justice issues embedded in education as social practices—moving beyond learning paradigm debates between behaviourism-cognitivism and constructivism. Fortunately, by the time I proposed my dissertation research I was able to blur the boundary between the pragmatic and critical perspectives and I see the potential of having a complementary framework in my own work.

Among many approaches to power and education, I was strongly intrigued by Foucault's approach, mainly because of my personal uneasiness with the Frankfurt School's critical theory based on a Marxist or neo-Marxist world view (e.g., Apple, 2004; Giroux, 2011). I agreed that schooling and education are not neutral practices but rather reflect unequal power relations in a broad society that are manifested and reproduced through the process of socialization in schools. I also certainly valued the critical insight provided by a large number of educational works that utilized a structural lens of critical theory. However, I could not see the value and applicability of the oppressor-oppressed division for my own research concerns about online course design and teaching experiences of instructional designers and instructors within a higher education institution where the instructional theory-practice gap exists. More personally, it was not helpful in making sense of who I am and did

not reflect my own life experiences and struggles, which did not seem fit into any typical social, economic, and cultural categories. I was, and still am, an international doctoral student separated from my middle-class family in Korea, in which I am a daughter of supportive parents who are also educators, a wife of a non-patriarchal husband who agree to me pursuing my study alone in Canada, and a mom of a two year old girl who has been raised by her grandparents and father in Korea. Thus, I often felt uncomfortable with some of the arguments made by my colleagues who were much engaged with critical scholars' ideas of understanding society, culture, education and people's experiences in more deterministic ways.

To resolve this conflict I tried to find a different kind of critical analytic lens to make better sense of my research context and target populations. Through this search that started from reading the critiques of Marxism, I fortunately met Foucault and my two thesis advisors, Dr. Megan Boler and Dr. Roland Coloma. Reading Foucault's works that analyze the history of particular social understandings helped me to see the online instruction theory-practice gap as a small part of a big picture of higher education in which different discourses, knowledge, practices, and power are intricately entangled. With enthusiastic encouragement and support from my cross-departmental supervisory committee, I was able to develop my current thesis project and questions. It is worth stressing that using Foucault's theory as an analytic lens does not mean that I have expertise in Foucault's theory or I am a Foucauldian researcher who is studying and exclusively working with Foucault's ideas. Rather I consider myself as an online education researcher who is particularly concerned with improving peoples' experiences of online education by reducing the disjunction between our expectations and the realities of online education and who, for that purpose, is using Foucault's historical analytic lens in this particular research project. The ways I utilized Foucault's ideas will be described in more detail in Chapter 3.

1.4.3. Terms

Distance Education, Internet-based Distance Education, and Online Education

In this thesis, I interchangeably use distance education (DE) and online education. DE is an umbrella term that covers all kinds of DE practices mediated by different technological media: from the first generation of print-based correspondence learning, the second generation of multimedia and computer-assisted learning, the third

generation of Internet-based learning (Guglielmo, 1998). The third generation according to this categorization is online education. Due to my historical approach to the current online education, an offspring of traditional DE, I generally prefer the term DE to online education. However, because of the radical difference between the desired pedagogical approaches of the previous generations of DE and current online education, I will specifically use the term online education when I discuss the pedagogical difference or if it needs to be considered in the context. In addition, when I want to clearly indicate one particular form of DE, I will use either traditional DE (or correspondence study) or Internet-based DE.

CHAPTER 2

LITERATURE

The Origin of [Discourses of] Online Education: The Rhetoric of Openness and Innovation

This chapter provides a more detailed contextual understanding of this study by exploring the historical origin of our current perceptions about online education along with the evolution of distance education (DE) in higher education context. Two important themes of discourses related to the roles of DE and instructional technologies have emerged throughout my literature review, which are: a) openness and b) innovation. That is, DE *opens* the door of higher education to the underserved students and technological *innovation* leads pedagogical *innovation* in DE. These perceptions of DE have fundamentally constructed our current expectations of online education to increase accessibility to post-secondary learning opportunities and to improve the quality of post-secondary instruction. Based on Foucault's (1990) approach to analyzing dominant social discourses, I paid close attention to how and in which conditions those discourses emerged and developed as dominant discourses in the field of DE. This historical literature review suggests that these discourses are more closely associated with the original purpose of DE (rather than the actual achievement of DE) and the technological dependence and imperative in the field of DE (than the actual quality of DE instruction). Nevertheless, those rhetorical discourses have guided our research and practices up to the present day. In this chapter, I particularly focus on multiple controversies emerging in relation to the distance between these rhetorical discourses and the actual DE practices, which provides the backdrop for my dissertation study.

2.1. Nature of Distance Education and Two Kinds of Definitions

The particular nature of "learning at a distance" tends to be regarded, at least among distance educators, as a promise to provide educational opportunities to people who are not able to attend face-to-face programs (Moore, 1973; Keegan, 1980; 1996). In this perspective, DE has been conceptualized as an effective means to open the door of higher education to the non-traditional or disadvantaged learners (Wedemeyer, 1981). That is, the *distance*

in DE enabled those learners underserved by traditional face-to-face universities to have access to higher education. In fact, many DE institutions (e.g., open universities) were established with a humanistic and democratic commitment to serve non-traditional learners (e.g., adults with diverse barriers and other responsibilities) by providing independent correspondence study programs. For example, Athabasca University, an open university in Canada, defines DE as:

Distance education is different from conventional classroom-based education in that it allows you as a student to complete courses and programs without attending scheduled group classes in a central location, such as a university campus. As an AU distance education student, you can work from anywhere, such as your home or workplace, work at your own pace, on a schedule that suits your individual needs... (Athabasca University, 2014)

In this particular form of education, teaching and learning are technologically-mediated and need to be pre-planned through an institutional (often industrialized) design and development process (Peters, 2007). The field of DE, therefore, has long focused on the possibilities of emerging technologies and related instructional design strategies. That DE practices are often categorized according to the technological medium that each of them uses (Swan, 2010) demonstrates the strong technological focus in the field. Conceptualizing DE based on the evolution of its technological medium of instruction has inevitably resulted in an underlying technological deterministic approach to understanding DE among DE scholars (Pittman, 2013).

For example, Internet-based DE practices are conceptually well-differentiated from traditional DE ones and new terms such as online education, online learning or e-learning are more commonly used to refer to these new Internet-based educational practices rather than Internet-based DE (e.g., Edwards, 1995; Kanuka & Brooks, 2010; Oblinger & Oblinger, 2005; Sims, 2008; Swan, 2010; Twigg, 2001). Although the distinctions between the new terms are unclear and the use of each term is inconsistent throughout the DE literature (Moore, Dickson-Deane, & Galyen, 2011), there is a shared emphasis on its mediation through Internet technologies. In this way of conceptualizing DE practices, the pedagogical differences between the new and the old DE practices are also largely explained by the distinctive features of Internet technologies compared to those of previous DE media including radio-television. Due to the technological features of the Internet, Internet-based DE is often characterized as interactive and collaborative, that is, as an innovative form that could overcome the inherent

educational limitations caused by the physical distance from teacher (Garrison & Kanuka, 2008). On the other hand, traditional DE is conceptualized as being limited to individualized learning practices because of the separation from teacher and other learners (Schlosser & Simonson, 2010). Although this distinction is connected more to the evolution of technological media outside the field rather than resulting from careful observation or reflection on actual DE practices in the field, Internet-based DE tends to be regarded as superior to traditional DE.

Keegan (1988) argued that DE scholars often confuse the programmatic definition with the scientific one and most of the current DE definitions are programmatic. The scientific definition answers questions such as “what does the term mean?” and provides “an account of the meanings of its prior usage in educational discussion” (Keegan, 1988, p. 6). The programmatic definitions of DE, unlike the scientific ones, describe a fraction of DE (the existing favorable elements) or the future of DE (the desired or hypothetical elements). This means that much of our understanding of DE is not based on the shared aspects of common DE practices and the actual status of the field but instead is restricted to the positive characteristics of particular DE programs or the goals to be achieved among DE scholars. Keegan’s (1988) argument indeed corresponds to others’ critical observations about a common problem in DE studies—including the most recent online education studies—that report positive effects of a *single* DE program, which is often concerned with an innovative research-based design and teaching effort. Most DE research actually describes desirable instructional design based on the researchers’ own research-teaching experiences rather than a general perspective building on the most common instructional design practices in the field (Davies, Howell, & Petrie, 2010; Naidu, 2005; Zawacki-Richter, Bäckler, & Vogt, 2009).

Through this historical literature review, therefore, I attempted to examine the emergence and development of those programmatic definitions or claims about DE, which seemed to become common discourses of DE and further influenced our current understanding of online education. As described earlier in this chapter, the nature of learning at a distance enabled DE or DE institution (e.g., open universities) to provide more accessible educational opportunities to non-traditional learners who could physically attend universities (Burge & Polec, 2008; Miller, 2010; Peters, 2008). The strong instructional emphasis in the field to close the distance

between teacher and learner and so to help these non-traditional learners to have better learning experiences had led to increasing attention among DE researchers to the use of different technologies as instructional media. In recent years, Internet technologies are particularly regarded as a driving force for effective DE, namely, online education (Adams, 2007; Harasim, 2000; Swan, 2010). The great potential of Internet technologies for online communication has also contributed the further development and acceptance of the assumption of openness of online education. The one of the most frequently cited statements about online education below well presents these similar claims:

There is no longer an issue of having to choose between access (independence) and quality (interaction). It is now possible for students to *learn collaboratively anytime, anywhere*. The online communication and conferencing capabilities of computer mediated technologies are providing opportunities *to revolutionize higher education*. (Garrison & Kanuka, 2008, p. 18) [emphasis added]

According to the passage, DE using Internet technologies is able to achieve its democratic mission as well as be pedagogically innovative. However, having considered the rampant programmatic definitions of DE, we know neither if the original democratic purpose of DE had been actually achieved nor if the educational potentials of previous technologies has been ever fully realized in DE context. Thus, in order to deepen our understanding of DE beyond the programmatic definitions or the limited technological conceptualization of DE, I surveyed the historical backdrop of the field from where the discourses emerged and upon which current online higher education is based. The next section will delineate both past and current contexts of DE and online education to highlight how those discourses have been constructed and maintained. I will also demonstrate there has been a serious disjunction between these discourses and actual DE practices.

2.2. Openness: “DE Opens the Door of Higher Education to the Underserved Students”

2.2.1. The Democratic Purpose of the Early DE and the Open Learning Movement

The origin of DE is variously described in the literature according to different researchers and some limit their discussion of the historical background of DE to more recent technological media (Adams, 2007; Saba, 2013). Although much literature focuses on Internet technologies as a driving force for the development of DE, its origin in fact, dates back to the mid-1800s (Larreamendy-Joerns & Leinhardt, 2006; Verduin & Clark, 1991). In 1858 the

University of London started to provide correspondence programs for students seeking an external degree (Haughey, 2010) and its students were “women and racial minorities who were barred from higher education by political or personal circumstances” (p. 48). The first US correspondence program, also for women, Anna Eliot Ticknor’s *Society to Encourage Studies at Home*, was launched in 1873 and more than 7,000 women across social classes and geographical boundaries were enrolled (Agassiz, 1971; Bergmann, 2001). At the end of the 1800s, elite universities in both the US and the UK began providing a vast group of distance students with correspondence teaching as a part of the university extension movement (Storr, 1966). These first DE programs were mainly dependent on the voluntary commitment of a few intellectuals and universities to increase access to higher education among underserved populations including women, blue-collar workers and farmers (Tracey & Richey, 2005).

During the 1960s and 1970s, an “open learning movement” emerged in the higher education field out of similar democratic concerns. Beginning from the Open University of the United Kingdom (UKOU) in 1969, 20 open universities and autonomous DE institutions, were established in more than 10 countries over a decade aiming to provide accessible higher education programs (Peters, 2008). Being differentiated from residential universities, the open universities specialized in distance teaching and DE research and focused on mass production of independent correspondence study programs using affordable technologies (Guri-Rosenblit, 2009a). Open universities “touted themselves as institutions offering people a second chance to earn a degree” (Shale, 2010, p. 96) and attracted and accepted adult learners with open admission policies based on their democratic mission.

The rapid speed of the development of the DE programs during the period was described as “seven-league boots” (Perraton, 2000, p. 2). Unlike the previous university-led extension movement, this rapid expansion of open universities was mainly guided by governmental planning and facilitated by both political and financial support from governments (Miller, 2010; Peters, 2008). The growing public interest in DE and generous funding for DE research led to the birth of DE scholarship during this period as well (Bates, 2005). And, multiple slogans and mottos such as “education for all” (Daniel, 1999, p. 5) or “cradle-to-grave ‘open’ education” (Wedemeyer,

1981) emerged. In this context, DE was promoted fast as an open educational practice and this promise of openness of higher education was framed within the discourse of DE.

However, the open learning movement was in fact largely based on diverse political and economic interests that conflicted with the widespread understanding about its motivation of “educational empowering” the underserved population (Harris, 2008; Sumner, 2010). The open mandate of DE in the US, for instance, was not a pure utilitarian initiative but rather “a response to the workforce and economic developments” (Miller, 2010, p. 26). The political concerns about national competitiveness, which increased particularly after the launch of the Sputnik satellite in 1957 in The Soviet Union, were a strong driving force behind the governmental planning of the open learning movement in the 60s and 70s (Haughey, 2010). In many other countries as well, higher education was regarded essential for fulfilling a national mission to produce more educated and trained workforces and DE was perceived as a cost-effective means to achieve the national economic growth plans (Peters, 2008). Also, building open universities was a convenient means to relieve the governments’ financial burden of expanding residential universities to satisfy the growing public demand for higher education. Since their birth, the growth of open universities has been also influenced by multiple groups such as DE scholars, higher educators, educational technologists, and policymakers all having different interests and agendas (Harris, 2008). The collective efforts of these *dominant* social groups to achieve their own goals was actually stronger than the well-meaning but less intense democratic commitment to the social justice of the interests of *marginalized* groups (Haughey, 2010).

2.2.2. The Operation of Open Universities: Ideals and Realities

No matter what kinds of political and economic motivations fundamentally led the development of open universities, it cannot be denied that open universities have been striving for increasing access to higher education for underserved people. Thus, the growing success of open universities has been often perceived as clear evidence of increasing accessibility to higher education and the discourse “DE opens the door of higher education to the underserved students” spread and circulated fast throughout different social contexts. Despite their long commitment to open learning, however, the open universities seem to have not been very successful in fully

realizing their democratic mission. In fact, fully achieving the mission of open universities, serving the disadvantaged population, requires a much more complicated and careful application of this principle of openness than just having open admission policies. The first UKOU chancellor also argued that “being open” requires a multi-directional approach including being “open to people, open to places, open to ideas and open to methods” (Haughey, 2010, p 52).

Although the vagueness of the term open learning was questioned earlier in 1970s, great enthusiasm for open universities swept away the concern (Lefranc, 1984; Lewis, 2002). In parallel with this educational imperative, a clear (or too simplistic) representation of distance learners who were internally motivated adults working or having other responsibilities but seeking for a second educational chance (Keegan, 1993) also contributed to this simple operation of openness. These non-traditional “back door learners” (Wedemeyer, 1981, p. 19) were portrayed, for example, as “a woman who put her children to bed and worked on her assignments in the kitchen.” In this kind of portrait, students’ strong motivation and desire for learning were more highlighted than their situational difficulties or disadvantaged background (Burge & Polec, 2008). Based upon the particular understanding of distance learner, early DE institutions simply focused on providing learners with opportunities and “freedom” to begin and independently study “at their convenience” (Wedemeyer, 1971, p. 3).

This particular image of the distance learner was reinforced by theoretical works in the field of adult education. Named *andragogy*, it differentiated its instructional approach to adult learning from *pedagogy* (Knowles, 1985). This andragogical perspective regards adult learners, in contrast with children, as autonomous subjects who are free from dependence and whose situation is influenced and controlled only by a source from within oneself (Usher, Bryant, & Johnston, 1997, p. 93). This conceptual understanding of adult learners tied in closely with the traditional portrait of back door learners and the philosophical assumption underlying the independent study programs at open universities (Haughey, 2008; Peters, 2002). A relatively new concept of lifelong learners who demand autonomy and choice, and who, at the same time, take charge of their learning outcomes (Bates, 2005) is well matched with this andragogical claim.

However, there have been conflicting research findings in relation to this andragogical understanding of adult learners or lifelong learners in the broader field of higher education. For example, Edwards (2008) argues that adults' learning motivation is in fact external rather than internal in our current social context with its growing emphasis on lifelong or continuing education. All adults, regardless of their desire and living conditions, tend to be under societal pressure to participate in learning activities (Fejes, 2008). In this context, adults are often forced to discipline the self to be a successful lifelong learner rather than having the freedom to seek for (or refuse) educational opportunities according to their needs and circumstances. Nevertheless, the andragogical view tends to be still accepted and appreciated and further justified in DE institutions through reference to the institutional emphasis on openness, which is again simply operationalized by open admission policies and independent study in many contexts.

In the field of DE as well, however, there has been growing research suggesting the simple operation of openness as creating educational opportunities solely through minimum entrance requirements does not ensure distance learners' academic success. The reality is that learners "from disadvantaged background need more support and care than students from well-to-do backgrounds" (Guri-Rosenblit, 2009b, p.11). Furthermore, many researchers demonstrate that learning at a distance requires higher metacognitive skills and additional multi-tasking skills are essential for successful distance learners particularly who study in Internet-based DE programs (Peter, 2001; Moore, 2009). Online learners are often frustrated due to a lack of self-regulated learning skills and various time management issues (Sáiz, 2009). Thus, a large group of academically less proficient and experienced students are entering the DE institutions thanks to their open nature but they soon face the higher level of challenge inherent in the distance from the teacher.

In fact, there have long been higher dropout rates among distance learners over traditional face-to-face students (Levy, 2007). A great number of adult learners at UKOU, for example, tend to spend more time to complete their courses than the expected amount of time allotted and students report that it is challenging to regulate and complete their courses. 43% of students who had dropped their courses chose "I fell behind with my course work" as the reason for dropping out (Thorpe, 2009, p. 461). This situation has further generated a

criticism of DE institutions that attract and admit even *unprepared* students to increase the enrollments and the cost-effectiveness, as a means to raise the overall level of revenue (O'Hara, 2008 in Kanuka & Brooks, 2010).

Despite these research findings and criticism a long-standing perception about adult' learners as being internally motivated and self-regulated continues to be regarded as a valid claim in many DE literatures (Bates, 2005). It seems to be mainly because the belief that adult learners are "autonomous and self-regulated with regard to goals, methods, and media" (Peters, 2007, p. 15) fits well with the operational mechanism of DE institutions. Thus, the simple operation of openness through open admissions without appreciation of its complete meaning combined with limited recognition of distance learners' actual preparedness, has led to the acceptance of the discourse of openness as fact.

2.2.3. A Competitive Online Education Market

From the mid-1990s, open universities have been experiencing economic difficulties mainly caused by government cutbacks and limited funding for DE research (Black, 2013). On the other hand, the advent of online education mediated by Internet technologies and the growing public interest in online education, has resulted in a rapid increase in the size of the DE enterprise and DE materials have become attractive marketable commodities (Harting & Erthal, 2005). There are emerging competitors such as new online education institutes using advanced infrastructures and aggressive marketing strategies as well as residential universities starting to provide more programs online. The main focus of these new for-profit DE institutions, which are often referred to as online diploma mills, is in fact simply increasing student enrollments rather than increasing access to higher education for underserved people (Guri-Rosenblit, 2009b).

In this context, there have been salient changes to the demographics and characteristics of distance learners (Burge & Polec, 2008). The diversity of the student body has rapidly increased along with the growing social recognition of online education as an accessible and flexible medium for post-secondary learning or lifelong learning (Bates, 2005). In the current online education programs, there are an increasing number of new student populations including disciplined lifelong learners pursuing their second or third university degrees or

graduate studies (i.e., professionals possessing several degrees), residential students who want single course credits to earn a degree from their home universities, and high school students who are not even adults taking online courses to supplement their home schooling or advanced learning. These new students are not necessarily underserved individuals educationally, socially, or economically in the way of traditional distance learners.

Consequently, while traditional open university students tended to be grateful, deferential, and greatly compliant with the systems set in place, current learners are rather “time-stressed, credential-hungry, client service-oriented and multi-tasking over long work days” (Burge & Polec, 2008, p. 248). These self-oriented *consumer*-like learners tend to have higher expectations of institutional services in terms of their time and financial investment so that they are not very patient with any inconveniences they face in learning conditions even when enrolling in a single course. In order to offer these multiple groups of learners, who are generally not loyal to a single DE institution among many available, open universities have moved their pedagogical focus from accessible learning to flexible learning where the focus is on providing learners with much more choice over their learning context and content (Brabazon, 2007; Evans & Pauling, 2010).

However, providing flexible educational services that meet current students’ diverse needs and expectations is much more complicated than simply providing educational opportunities to every adult. It requires open universities to change not only their pedagogical models (e.g., course design and educational service) but also their fundamental operational mechanism. Indeed, there have been a growing literature explicitly discussing new economic and business strategies for open universities and DE institutions to help them increase their competitive advantage in online education market and to secure profits (e.g., Elloumi, 2004). These authors, strongly influenced by economic theories, do not hesitate to call students clients, customers, or purchasers and their focus is certainly far from the original democratic purpose of DE, which was to open the door of higher education. This transition, facilitated by external factors, has further exacerbated the gap between the idealized discourse about openness and the actual situation where the educational gap remains as pervasive as ever and social inequalities continue to grow (Haughey, Evans, & Murphy, 2008).

In conclusion, the openness discourse is more rhetorical than accurately descriptive in the current DE context where online education institutions are under pressure to increase their enrolment level, which has become a main source of their funding (Cleveland-Innes & Sangrà, 2010). There are continuing struggles between their original focus on openness and new market-driven values like “commercial imperatives” to adopt corporate business models that seek for revenue (Evans & Pauling, 2010). These ideological struggles suggest the necessity to re-examine our taken-for-granted assumption about opening to the underserved students as their ultimate goal and priority of DE institutions. Nevertheless, recently, there has been enthusiastic expectation of greater openness in higher education occasioned by the rapid uptake of massive open online courses (MOOCs) and open educational resources (OER) initiatives (Bonk, Lee, Reeves, Reynolds, 2015; McAndrew, 2010; Simonson, 2012). This enthusiasm initially distracted our attention from the messy realities in the DE context back to the idealized rhetoric about the openness of DE (Baggaley, 2013) in the same way that the great enthusiasm for open universities swept away the concern about the ambiguity of the term openness in the early years.

2.3. Innovation: “Technological Innovation Leads Pedagogical Innovation in DE”

2.3.1. The Role of Instructional Technologies in DE Context

As discussed earlier, since the first correspondence programs in the mid-1800s, the main concern among distance educators had been to provide educational access to underserved people who were not able to attend to residential universities. DE scholarship developed with a rapid growth of open universities and a growing body of distance learners in the late-1900s (Black, 2013). During this time, the dominant approach to instructional design in the field was the mass production of affordable independent correspondence study programs (Wedemeyer, 1981). Focusing on accessibility to higher education, different technological media (i.e., TV-radio) were used to improve the quality of DE instruction and DE became conceptualized based on development of particular technological media. Distinctive features of each medium constructed different instructional and pedagogical practices in the programs (Evans & Pauling, 2010; Hughes & Hillebrand, 2006) and so DE practices are often categorized into different generations according to the technological medium that each of them uses (i.e., Guglielmo, 1998; Moore & Kearsley, 2005; Taylor, 1999).

According to this conceptualization, newer generations of DE practices, which use more recent technologies, tend to be regarded as better and more effective than older generations in this categorization (Harting & Erthal, 2005). In most recent years, the development of the Internet has opened the new era of online education and it has led to radical transformation in the nature of DE practices and research (Beldarrain, 2006). Although each technological medium offers learners unique learning experiences by enabling particular kinds of interactions among learners, teachers, content and environments (Vrasidas & Glass, 2002), one of the most distinctive merits of the Internet from previous DE media is that it provides a cost-effective means of communication for multiple users (Kanuka & Brooks, 2010). These affordable online communication tools have enabled interaction *among* distant learners, which was not possible in the previous generations of DE programs.

This potential of Internet technologies has aligned with and encouraged the adoption of new pedagogical theories such as social constructivist theories and collaborative learning theories into the field of online education (Adams, 2007; Harasim, 2000). With the advent of this new instructional approaches therefore, the central focus of DE instruction has been transformed from providing accessible independent learning opportunities to enabling interactive learning and creating communities of distant learners in DE programs (Beldarrain, 2006; Garrison & Cleveland-Innes, 2010). It has produced both opportunities and imperatives among traditional DE institutions to change their pedagogical approach to DE programs from independent correspondence study to collaborative online learning (Swan, 2010).

In the broader higher education field, there had been a prevailing perception of DE as *second-rate* education mainly due to a lack of interaction between teacher and learner and this had been criticised as the Achilles heel of previous DE programs (Hülsmann, 2009). The interactive potential of Internet technologies thus became as a driving force behind pedagogical innovation and instructional quality improvement in DE. That is, interactive online education was expected to elevate the status of DE to that of mainstream education. Different from other technological media that had been used exclusively for DE, the Internet has been considered as a disruptive force across the whole of higher education including both open and residential universities (Miller, 2010; Garrison & Cleveland-Innes, 2010). Research-based residential universities, in fact, have also become

active participants in online education (or blended learning) practices and online education research (Harasim, 2000).

As a result, large numbers of small-scale studies have been produced in those blended contexts and researchers' successful instructional experiences, often within a single experimental online course, have strongly promoted the effectiveness of online education. In other words, those studies have produced programmatic definitions of online education rather than scientific ones. This has further resulted in both a technological-reductionist understanding of DE (i.e., traditional DE versus online education) and a progressive view of instructional technologies and their great potential for higher education. In this context, recent online education researchers have tended to focus exclusively on the development and discussion of online education practices with little interest in traditional DE and the historical background of the field (Saba, 2013). This expansion of online education scholarship has further accelerated the speed of educational adoption of Internet technologies and has further contributed to the growing expectation of pedagogical innovation in DE.

2.3.2. Complexity of Pedagogical Innovation and Limitations of a Deterministic Approach

It is not a false claim that using innovative technologies can improve the quality of DE instruction because pedagogical activities in DE are mediated by technologies and each medium constructs different pedagogical experiences (Evans & Pauling, 2010; Hughes & Hillebrand, 2006). However, the overemphasis on technological advancement and implementation among DE scholars reflects their deterministic view about the relationship between technologies and DE practices (Clark, 1994; Marvin, 1988). The deterministic understanding of technological media—such as “the medium is the message” in McLuhan’s (1964) thesis—brings two fundamental assumptions into social discussions, a) that technologies progress along a fixed course from less to more advanced forms and b) [modern] social institutions must adapt to the *imperatives* of technological innovation (Feenberg, 1992, p. 304).

This deterministic perspective fails to consider complex social conditions that all influence particular social changes and it also overlooks the possibility that technological changes might not always lead to more

advanced forms of social practices (Feenberg, 1992). In the field of DE, for example, there has been a shared imperative to adopt Internet technologies based on the increasing expectations of the potential of online communication tools for collaborative online education. The bursting of the “Tech Bubble” (p. 139) well represents the great excitement of the Internet technologies throughout the social and economical contexts, which has also facilitated this technological imperative and inevitably devalued the old technologies (Ice, 2010). This rapidly emerging imperative to adopt the Internet often subverts the older DE technologies and pedagogies despite their ongoing value and influence on the field (Bates, 2008).

Nevertheless, the current status of online education in terms of its technological adoption and pedagogical innovation suggests that “the development of DE is not a simple linear progression, with each new medium topping the previous one... each medium or format can continue to have appropriate, legitimate, and beneficial uses” (Pittman, 2002, p. 118). In fact, large DE institutions, including many open universities, have experienced a much slower adoption of online education than other residential universities and have struggled to implement a social constructivist learning paradigm (Bates, 2008). One of the most critical barriers to rapid technological and pedagogical changes that DE institutions have experienced is related to their *cost-effectiveness* principle. Since their development, DE institutions have gained considerable cost advantages over face-to-face programs mainly through mass production of independent study programs that use affordable technological media (Hülsmann, 2009; Perraton, 2000; Rumble, 2004; Woodley, 2008). The cost-effectiveness of DE is essential for its competitiveness and achieving it is much more complex than just adopting the most cost-effective communication technologies (Kanuka & Brooks, 2010).

Along with the cost-effectiveness, *flexibility* is also an important feature that DE institutions have provided to distance learners. However these two aspects often conflict with the new pedagogical approach of online education. Online education that integrates social constructivist learning theories necessarily requires a smaller size class and encourages active participation among learners. So the emphasis on interaction among distance learners tends to increase the *cost* of DE programs but it also decreases the *flexibility* of the programs and learner independence (Holmberg, 1995). Distance learners with their many other responsibilities, may be unable

to devote the time required for interactive learning components so may prefer the structure of traditional independent DE to that of collaborative online DE (Battalio, 2007). Therefore, a great number of distance educators rather perceive the new technological medium as a tool either for advanced independent and personalized learning or for extended access to educational materials (Garrison & Cleveland-Innes, 2010; Harris, 2008; Peters, 2003). In this context, Kanuka and Brooks (2001) conclude that all three dimensions of effective online education, which are interactive learning, flexible access, and cost effectiveness, cannot be achieved at once.

Another important issue is the growing digital divide in the current social context (Guri-Rosenblit, 2009c), that is, the question of who *benefits* and who is *marginalized* through new online education practices. Having considered that there is a large group of people in both developed and developing worlds who do not have access to the Web, moving towards online may necessarily reduce the openness of DE programs in those contexts (Bolger, 2009; McKeown, Noce, & Czerny, 2007). Also, the fact that the most active learner group in using innovative social communication media consists of young, male, well-educated, affluent Western people (Selwyn, 2009) demonstrates that simple access does not guarantee active widespread participation in interactive online education. Thus, those who are already *well-prepared* (with a high academic language level) and *well-connected* (having access to the Internet) are most likely to benefit from online education (Spronk, 2001).

It is important to note that even within developed countries like the UK or Canada, adult educational Internet use remains unequal among different socio-economic and occupational classes (McKeown et al., 2007; White & Selwyn, 2012). It suggests the barriers to online learning participation among adults are much more diverse and complex than just a matter of access. In fact, a large percentage of adults who have access to the Internet do not participate in Internet-based learning practices (Selwyn & Gorard, 2003; Selwyn, 2011; White & Selwyn, 2012). These studies also suggest that the learning attitudes or behaviours of online learners are influenced by multiple other factors rather than simply determined by technological accessibility or availability.

Thus it seems our hope for online education offering a way to provide more inclusive DE for the under-educated is not occurring, instead there are only particular “slices of the population being included and other more substantial slices being excluded” (Bolger, 2009, p. 305) in these new learning practices. The result is that, “DE faded into the mainstream and the World Wide Web failed to provide worldwide learning as had been hoped” (Baggaley, 2008, p. 49). In conclusion, there is an increasing gap between the “sweeping expectations” and the actual effects of the new technologies in the field of DE (Guri-Rosenblit, 2009a).

2.4. Conclusion and Discussion

In this historical literature review, I described how much of our current expectations of online education to increase accessibility and the quality of post-secondary education has been influenced by the false conceptualization of DE, which is based on its programmatic definitions emphasizing the ideal characteristics of DE. The two dominant, often taken-for-granted, discourses about DE that a) DE opens the door of higher education to the underserved students and b) technological innovation leads pedagogical innovation in DE tend to be rather rhetorical rather than actual. The origin of each discourse is associated with the original democratic purpose of early DE and the open learning movement and the technological dependence and imperative in the field of DE.

First, the original purpose of correspondence education and the open learning movement was to provide educational opportunities to people having limited access to higher education. Without clear evidence of fulfilling the promise of its democratic mission, the rapid growth of open universities based on the limited approach to openness has been regarded as a successful result of the open learning movement. However, because of the challenging nature of learning at a distance, the large group of unprepared students admitted through the open admission policies have not achieved academic success in their DE programs. This further suggests that we have not been successful in fully achieving our open mission. In addition, unlike our simplistic conceptualization of distance learners as independent adults from disadvantaged backgrounds, current consumer-minded learners are diverse in their backgrounds and needs. Under the growing economic and market-driven pressures many DE institutions have already shifted their institutional focus from that of opening the door of higher education to one

of satisfying the needs of their customers in order to maintain the enrolment rate. As we think about how the multiple interests of different groups have influenced DE development, we need to avoid repeating the rhetoric of the open mandate, and instead ask the question “whose interests are being legitimated and made more powerful in this context?” (Harris, 2008).

Second, due to the important role of the technological medium in DE instruction to unite teacher and learner, there has been a strong focus on adopting new communication technologies to increase the effectiveness of DE instruction. Since each medium provides different pedagogical experiences, DE has been often conceptualized according to its technological medium. In the current online education context, the potential of Internet technologies for enabling collaborative distance learning contributes to the role of technologies in DE being seen as the driving force behind pedagogical innovation. A large number of online educational studies have provided positive results, which supports the claim about the educational potential of Internet technologies. However, those studies have been mostly conducted in experimental environments in campus-based universities. In fact, the slow adoption of online education and collaborative learning models in most DE institutions suggests a gap between the sweeping expectations and the actual effects of the new technologies in the field of DE. Overall then, the belief that Internet technologies lead to pedagogical innovation in DE seems too deterministic to fully characterize the actual effects of Internet technologies in DE.

Although there is a limited understanding of DE in these prevailing discourses in the field, there have also been continued critical and reflective efforts to re-examine DE theories and practices as the large number of references in this chapter suggests. Nonetheless, those critical voices have been taken up less seriously by DE and online education researchers than the more popular discourses. One reason for this could be a lack of collaborative effort in the field to collect those voices and generate a comprehensive and critical discourse powerful enough to question and change dominant discourses. According to Foucault (1995), there are always multiple competing discourses within a certain field. And, the regime of truth that decides which knowledge, thoughts, language, and behaviours are more valued at a particular moment is usually based on those more powerful discourses. That is, the certain ways of thinking and speaking that are considered more legitimate are not based on their actual validity

or “truth” but are rather framed within the *regime of truth* produced by the dominant discourse, which does not necessarily represent reality.

In this chapter, therefore, I have focused on collecting seminal works that provide us with critical questions and perspectives that differ importantly from those dominant ones and I have used those to draw a comprehensive picture of DE through organizing the critical questions in a systematic manner with regard to the two rhetorical discourses of openness and innovation. By specifically situating them in both historical DE and current online higher education contexts, this analytic literature review demonstrates that the origin of *discourse* of online education, which is the central theme in this thesis study, is not based on actual DE practices but the rhetoric of DE. Therefore, I will argue that the field of online education needs to be more critical about our understanding and expectations of online education and pay more attention to the critical voices scattered in the literature. It is becoming increasingly urgent to provide online educators with wise and practical suggestions to address the multiple controversies emerging in relation to the growing disjunction between what we believe about ideal online education (programmatic definitions) and what is actual online education in practice (scientific definitions).

CHAPTER 3

METHOD

A Study of the History of [Discourses of] Online Education:

Subjects, Questions, and Procedures

In the previous chapter, I described how our current perceptions of online education are deeply related to the nature of distance education (DE) and the old discourses about DE, which are: a) openness and b) innovation. Learning at distance provided students underserved by conventional universities with independent learning opportunities thus DE from its early stages had been perceived as *opening* the door of higher education to non-traditional students. However the distance between teacher and student inevitably brought about a lack of interaction between the two, which produced the negative perception of the quality of DE instruction as being inferior to the quality of face-to-face instruction. In this context, DE scholars had increasingly focused on adopting new technological media to reduce the distance (and so increase interactions) between teacher and learner. Therefore, it had been believed that technological *innovation* leads pedagogical *innovation* in DE. The most recent Internet technologies have been particularly expected to lead the pedagogical innovation in DE and so increase the status of DE to the mainstream education.

Although the old DE discourses were not accurate descriptions of how DE practices actually unfolded in many contexts, the openness of DE had become part of the taken-for-granted description of DE rather than being seriously evaluated by DE scholars. With the sweeping expectations about online technologies that may increase the quality of DE instruction the complexity of pedagogical innovation in DE has been concealed. In addition, the growing popularity and rapid uptake of online instruction across all higher education settings seems to play a significant role in increasing the rhetorical power and taken-for-grantedness of the openness and innovation of online education. However, despite their historical origins in the old DE discourses, our current understandings of online education—a) online education increases accessibility to post-secondary education and b) online education improves the quality of post-secondary instruction—are certainly not the same as the old ones. For example, the

current ubiquity of online higher education, I will argue, has reduced its original focus on openness particularly for the underserved while correspondingly increasing the importance of innovation based on new technological media and instructional theories.

Through my dissertation work, therefore, I decided to look closely into the evolution of the discourses of online education focusing on the continuities and discontinuities between the old DE discourses and the new online education discourses. That is, a central theme of my thesis study is the history of *the discourses* of online education rather than the history of online education. However, this thesis concerned not only the macro level of discourses (grand narratives) but also the micro level of practices (personal narratives). Only by looking into the both levels, am I able to critically examine the validity of our common understandings of online education and better describe the disjunction between the rhetorical discourses and actual online education practices. The primary question of my inquiry is, again: “How and under which conditions has the instructional theory-practice gap arisen in online higher educational context?” Along with answering this question, I particularly focused on analyzing the ways the rhetoric happens to produce actual power through influencing people’s beliefs and guiding their everyday practices in an online higher education institution specifically, an open university.

This chapter outlines the conceptual framework and analytic tools that I utilized for this multi-layered inquiry. First, I will introduce a Foucauldian research approach and important concepts in his works and explain how and why I decided to take up this particular approach as a guiding conceptual framework in this study. Next, I will lay out the scope of my research project including the global context of higher education as background and the local site of an open university as foreground. I will further situate my inquiry into the interconnected discursive space between the macro level of discourses and the micro level of practices by elaborating the central subjects of this research project, which will be followed by the four specific research questions. The last section of this chapter will delineate research methods including data collection and analysis methods and here, I will discuss in depth how I used Bakhtin’s dialogism as a complementary analytic tool to a Foucauldian discourse analysis in this study.

3.1. Research Approach: Foucault's Concepts and Methods

The concept of discourse in this study follows Michel Foucault's conceptualization, which I found particularly useful. Gee (1996) distinguishes Discourse (with a capital D) referring to a particular way of believing, thinking, behaving and interacting among certain groups of people from discourse (with a lower-case d) as a linguistic component at a conversational or dialogical level. Foucault's approach to discourse is in line with Gee's notion of Discourse. Foucault refers to discourse as a set of legitimated knowledge, norms, rules, and regulations that exerts power over people's lives through regulating and institutionalizing their ways of thinking, talking and acting (Foucault, 1990; Mills, 2003). Foucault's concept of discourse is closely connected to each society's *regime of truth*, in which a certain system of knowledge (or system of thought) is accepted and regarded as true and others are not (Coloma, 2011). That is, among multiple competing discourses in a particular social regime, dominant discourses produce a regime of truth that further decide which knowledge, thoughts, and statements count as true and false in each society (Foucault, 1995).

3.1.1. Foucault's Concepts: Discourse, Knowledge, Power, and Resistance

Foucault's works trace the emergence of particular discourses. To Foucault, discourse, in a broad sense, is a social and institutional process rather than a product or outcome. His historical analysis of discourses focuses on the social or cultural conditions in which the particular discourses emerge, become accepted by people, and come to be taken-for-granted (Foucault, 1990; Olssen, 2004a). By analyzing dominant discourses in disciplinary institutions (e.g., asylum, prison, family) at different historical points, Foucault demonstrates that people's perceptions about certain social concepts and behaviours (e.g., madness, punishment, sexuality) are not fixed but rather there are clear discontinuities between different periods. In his book, *Archaeology of Knowledge*, he focuses on the history of science as an academic discipline (Foucault, 1972). As well, he shows that knowledge is a historical product and the knowledge production involves complex disciplinary relations, interests, and practices based on the dominant discourses. New knowledge is neither discovered through a natural progress of uncovering pre-existed truth (i.e., knowledge evolution) nor produced through political efforts of one social group toward enlightenment (i.e., knowledge invention). Instead, knowledge is subjective and historical contrary to a common

assumption in our culture about knowledge inherently representing objective, universal and transcendental truth (Foucault, 1980).

The fundamental motivation for Foucault to analyze dominant discourses is that they produce and circulate power relations among people in a disciplinary institution which brings about unnecessarily unequal working or living conditions within the institution. Disciplinary knowledge (or theory) plays a significant role in this context (Foucault, 1990). He suggests that, “the delicate mechanisms of power cannot function unless knowledge, or rather knowledge apparatuses, are formed, organized, and put into circulation” (p. 34). In his book *Discipline and punish: The birth of the prison* (1995), Foucault also argues that “power and knowledge directly imply one another; that there is no power relation without the correlative constitution of a field of knowledge, nor any knowledge that does not presuppose and constitute at the same time power relations” (p. 27).

It is important to note that Foucault’s approach to power relations is different from the one postulated by Marxist critical theorists, who focus specifically on the structural mechanism of social or cultural reproduction (Aronowitz & Giroux, 1991; Bourdieu & Passeron, 1990). Marxist theorists focus on oppressive functions of power that indoctrinate the working class through the development of a misrepresentative ideological world view that serves dominant class interests (Mills, 2003). Foucault objects to the common Marxist understanding of power as an oppressive, possessive and top-down product within a rigid social and economic class structure, which perceived power as a noun. Instead, Foucault perceives power as a verb, which is a productive, relational, and often bottom-up process (Sawicki, 1991). Analogous to the role of capillaries in our body, to Foucault, power distribution in disciplinary institutions allows the development of many forms of social control so that individual members and their thoughts and behaviours are regulated and governed in particular ways. Thus, Foucault’s (1990) focus in analyzing power is not on the single centered or homogeneous power relation between the oppressors and the oppressed but on the multiple or complex forms of social control (e.g., regulations, possibilities) related to a particular disciplinary practice that is effective in a certain social regime.

Subjectification can be a useful concept that illustrates Foucault's notions of the knowledge and power relations. Subjectification is a process of constructing human subjectivity that involves both normalization and problematization of certain ways of thinking, talking, and acting (Foucault, 1982; 1995). In this process, people necessarily become the object of knowledge that defines legitimate thoughts and behaviours in each disciplinary institution and the disciplinary knowledge further produces a set of norms regarded as "good behaviours" and also a set of regulations useful for correcting "bad behaviours". Based on the norms—not based on social or economic strata—people are inevitably categorized into two groups, which are often attached to opposite human subjectivities (e.g., the mad and the sane or the criminals and the good citizens). That is, different subjectivities such as "active and passive student" and "innovative or traditional instructor" which we will see in this thesis, are not natural categories but products of social, cultural, and educational discourses (Comber, 1997).

Within this division, however, the normalized population can get more institutional benefits, whereas the problematized group are likely to be disadvantaged. This is how dominant discourses produce unequal power relations among people and so further induce people to normalize their behaviours and internalize the norms by self-disciplinary or self-correcting practices (Foucault, 1995; Dean, 2010). Foucault describes his analytic work on scientific knowledge in the fields of medicine and psychiatry and its disciplinary techniques⁴ and punitive power like this: "when I came to study the modes according to which individuals are given to recognize themselves as sexual subjects, the problems were much greater" (Foucault, 1985, p. 5). That is, he observes that discursive power is maximized when individuals recognize others, as well as themselves, as subjects of "sexuality" and conduct self-disciplinary or self-correcting practices to normalize their sexual behaviors or desire.

While emphasizing the regulative effects of discourses, Foucault was also concerned with issues such as individual subjects' freedom and agency. Even in his early work, the *Archaeology of Knowledge* (1972), he was mindful of the danger of a denial of human agency and so he clarified his position, "I have not denied—far from

⁴ Although Foucault uses a term *technique* interchangeably with *technology* in his works, I intentionally choose the term *technique* in order to avoid possible confusion between the Foucauldian concept of technology, which is a method to control human body or soul, and a common meaning of technology, which is often associated with machines among DE researchers and practitioners.

it—the possibility of changing discourse: I have deprived the sovereignty of the subject of the exclusive and instantaneous right to it” (p. 209). Subjects in power relations “are faced with a field of possibilities” for different behaviours and reactions although power relations are often so fixed and rigid that a space for freedom or resistance is extremely limited (Foucault, 1982, p. 221). In his lecture, *What is an Author?* Foucault more clearly describes the possibilities of resistance within power relations in terms of opening up “a new style of discourse” (Dreyfus, 1999). Most of the authors are discursive subjects who think, talk and write certain things in a certain way within dominant discourses, however, there are also founders of discursivity (e.g., Marx and Freud) who open up the possibilities for new ways of thinking, talking and writing, that is, new discourses.

Foucault (1990) explains the notion of resistance based on his own observation of specific cases of people’s resistance to dominant discourses:

Power is everywhere and always is accompanied by resistance; therefore, resistance is everywhere. Where there is power, there is resistance, and yet, or rather consequently, this resistance is never in a position of exteriority in relation to power. (p. 95)

Therefore, it can be argued that all discourses involve both power effects such as subjectification and possible resisting reactions of the subjects. One of the strategies to analyze this resistance is to focus on the specific cases of people’s thoughts and behaviours, which are different from the normalized one. Having considered that there are always multiple competing discourses, not only the dominant discourses but also many less dominant ones, in a particular social context (Foucault, 1995), the existence of resistance seems more obvious. The ultimate aim of discourse analysis needs to be questioning the common and often taken-for-granted understandings in a particular society by revealing the *unequal* human conditions and struggles that the discourse produces and to repeatedly “contribute to changing certain things in people’s ways of perceiving and doing things” (Foucault, 1991, p. 83).

3.1.2. Foucault’s Methods: Archaeology and Genealogy

Yates and Hiles (2010) argue that Foucault’s works do not provide any prescriptive methods but an adaptable set of analytic tools or “gadgets”. As such, Foucault’s four concepts (i.e., discourse, knowledge, power, and

resistance) and his sophisticated account of the relationship among the four provided a useful analytic framework for my study. Foucault's methodological approach to discourse analysis is often divided into two parts. The first part is an archeological approach to the emergence and development of dominant discourse in relation with the regime of truth that constructs legitimate knowledge and norms about a particular social practice. The second part is a genealogical examination of the power effects of the dominant discourse upon human subjects involving the complex mechanism of the subjectification of individuals, which involves both normalization and problematization of human subjects. The focus of Foucauldian genealogy, therefore, is not on an ideological level of social knowledge and discourse but on a physical level of people's living experiences and technologies of power operated in an institution (Olssen, 2004b).

Foucault suggests four general strategies for the genealogical approach to analyzing the modern forms of power, which informed each stage of my project (Scheurich & McKenzie, 2005). The four strategies can be summarised as: First, assess not only the negative, but also the possible *positive* effects of a certain disciplinary practice; second, do not perceive specific acts, procedures or processes as simple, intentional, or rational functions of legislation or social structures but as complex and interdependent technologies of power circulation and operation; third, examine a process of epistemologico-educational formation to understand the interrelationship between specific disciplinary practices and disciplinary knowledge in each educational situation; fourth, new modern technologies of power tend to be more sophisticatedly controlling (although they may look more democratic) so their effect can be a worse oppression not only at the level of the body but also the mind—that is, physically and mentally.

One way to effectively question our taken-for-granted understandings of online education is to detect the discontinuities between the rhetorical discourses and actual practices of online education. Among many other approaches to this kind of analysis, I chose the conceptual framework informed by Foucault's explanation of the relationships among discourse, knowledge, power, and resistance. Foucault's methods take a close look at the history of social discourses and unveil the social and cultural conditions in which the discourses have emerged and become dominant at a certain historical moment. Foucault was also interested in the formation of disciplinary

knowledge that circulates the power of dominant social discourses into disciplinary institutions through producing institutional norms that regulate people's practices. This account for the sophisticated mechanism of discursive power effects was certainly useful not only to analyze the history of online education discourses but also to excavate the underneath of the disjunction of the rhetorical discourses and actual practices of online education.

3.2. Research Scope and Subjects

To increase the feasibility of this inquiry involving this complex set of concepts, I narrowed the research scope down to a single online higher education institution in Canada and a particular historical moment of the evolution of online education scholarship in higher education. With the narrowed scope, I moved back and forth between the global context of higher education and the local site of the online institution throughout this study in order to reveal how and where the discontinuities between the global understanding of online education and local practices have emerged.

3.2.1. Global Context: The Evolution of Online Education in Higher Education

In 2000, at the beginning of the new millennium, Linda Harasim, one of the most well-known Canadian scholars in communication and online education proclaimed that a paradigmatic shift had happened in post-secondary education. In her extensively cited article published in *Internet and Higher Education* she begins her argument by quoting a short passage from a historian and philosopher of science, Thomas Kuhn's *The Structure of Scientific Revolutions* (1970):

The proponents of competing paradigms practice their trades in different worlds... Practicing in different worlds [they] see different things when they look from the same point in the same direction... [B]efore they can hope to communicate fully, one group or the other must experience the conversation that we have been calling a paradigm shift. (p. 150 in Harasim, 2000)

The "paradigm shift" is a meaningful concept to examine more closely in this research project. First, Kuhn's understanding of *paradigm* is closely related to Foucault's concepts of *a regime of truth* that decides legitimate knowledge, thoughts, and statements in each society. Kuhn's account of the paradigm shift focuses on the incommensurable differences between the old paradigm and the new paradigm in terms of the "sets of rules and standards about truth—what is to be studied, why, and how" (Popkewitz & Brennan, 1997, p. 300). In other

words, a very different doctrine is accepted and advocated within each scientific paradigm and thus a paradigmatic shift in science does not simply happen by the revision or the advent of an individual theory. In this perspective, the Kuhnian paradigm “shift” can be seen in line with a Foucauldian focus on the “discontinuity” or the “rupture” in social and institutional history (Foucault, 1970).

Neither a shift nor a rupture take place under a certain social group’s direction to change through intentional planning (unlike a Marxist or other deterministic approach to social changes). Instead, these events emerge from complex social relations and developmental phases. Having conceptualized the paradigm shift involving a series of phases in which a new paradigm is transformed into dominant *normal* science, Kuhn denies the absoluteness of a single paradigm but illustrates the multiplicity of paradigms in the field of science at any given moment. Foucault similarly observes that multiple competing discourses co-exist in a particular social regime, among which dominant discourses produce a regime of truth that further produces a set of knowledge, norms, and regulations which come to regulate social practices (Foucault, 1995).

Paradoxically, however, the term paradigm shift has migrated into social sciences and is used here, as in Harasim’s work, as a prescriptive notion that promotes a volitional change, contrasting with Kuhn’s original definition of paradigmatic change. Stickney (2006), for example, observes that the paradigm shift as a discourse in education is often associated with the global level of societal trends or pressures and is used to legitimize authoritarian educational policies or campaigns within the local level of school context. Stickney further argues that the paradigm shift rhetoric is misused in school or curriculum reform projects, that is, it is utilized in these contexts as a powerful tool to force teachers to develop a unified identity as change agents who actively and collectively participate to realize top-down reform initiatives in their schools and classrooms. Interestingly, in this context, the notion of paradigm shift itself, in turn, becomes a dominant discourse leading educational changes and exerting influence upon teachers’ beliefs and practices. Juxtaposing the original Kuhnian meaning of paradigm shift with its rhetorical use in online education literature was also useful for me to maintain my focus on the discontinuities and contradictions between global academic discourses and local institutional practices, which is closely related to the current instructional theory-practice gap in online higher education.

In this study, therefore, I consider this paradigm shift rhetoric in the academic field of online education as one of the important global (or academic) discourses that have produced and circulated knowledge and power relations into the local sites of online higher education institutions. So I first analyzed how and under which conditions it emerged and become a dominant discourse as well as which legitimate knowledge and norms have been produced under this discourse. As a way to analyze the discourse and its discursive product, which could not be directly analyzed, I chose to conduct an in-depth analysis of one of the popular academic texts that effectively illustrate the dominant rhetorical discourse and its discursive power effect in the field of online higher education. As Figure 3.1 demonstrates a number of peer-reviewed journal articles concerning online education⁵ had rapidly increased during the 5-year period between 1999 and 2003, with only 4 articles in 1998 compared to 123 articles in 2004. These data also reflect the rapid establishment of online education as a discipline during these years.

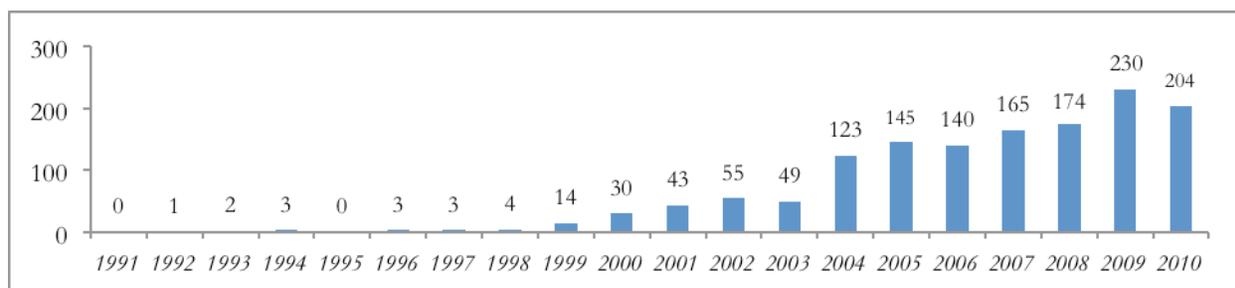


Figure 3.1. The number of peer-reviewed articles published in each year

Most of these early publications (e.g., Dede, 1996; Harasim, 2000; Palloff & Pratt, 1999; Scardamalia & Bereiter, 1994, 1996) enthusiastically propagate online education as a new and revolutionary form of education that would bring a social constructivist approach to learning into diverse educational contexts as a central pedagogical paradigm. Particularly, Harasim in her article *Shift happens: Online education as a new paradigm in learning* (2000) draws a clear conceptual boundary between online education and the other (traditional) forms of higher education through illustrating the pedagogical differences between the two by the notion of paradigm shift and provides a comprehensive overview of the distinct nature of online education. More than 490 academic works

⁵ The articles that contain one or more of search phases (i.e., online education, online learning, and online distance education) in their title or abstract were searched using ERIC database.

in online education have cited Harasim's article since 2000 (more than 50 works in 2014 and 2015). Furthermore, many of these works including those recent ones claim that online education is fundamentally different from as well as more effective than the other forms of DE or face-to-face education not by providing clear evidence to support the claim but by simply positively citing Harasim's argument⁶. The increasing number of academic texts that cite her argument demonstrates the dominance of this paradigm shift discourse in the academic field of online education as well as through these repeated citations, this taken-for-granted assumption about online education has continued to be reinforced.

However, my analysis reveals that her semantic approach to the notion of paradigm shift is rather prescriptive than being descriptive of the actual state of online higher education and that her explanations about online education are also rhetorical than being well-grounded in the realities of online higher education. She also fails to recognize potential barriers to the effective adoption of online education, at the institutional or individual level, in real-life educational situations (e.g., resistance, a lack of resources). Even though there have been a number of researchers who published research results contradicting Harasim's argument⁷, in fact, the paradigm shift discourse itself has not been directly questioned up to present. In this sense, although Harasim's article is certainly not a single force that produces the rhetoric of paradigm shift, it can be deemed as one of the influential texts that have facilitated the discursive practice in the academic field of online education. In addition, I will argue that the way she presents the paradigm shift discourse in her article represents the ongoing problem in the field of online higher education that the rhetoric about online education has become the doctrine of the field, which influences people's praxis of online education while increasing the disjunction between the rhetoric and the realities.

Thus, I believe that it is worth spending time (and space in this thesis) on reading the text closely in order to better understand the development of the rhetorical discourses in online education and the discursive power

⁶ See, Abedin, Daneshgar, & D'Ambra, 2012; Cohen & Nachmias, 2010; Daly, Pachler, & Lambert, 2004; Guasch, Espasa, Alvarez, & Kirschner, 2013; Nachmias, 2002; Nave, Tubin, & Pliskin, 2010; Papastergiou, 2006; Terras & Ramsay, 2015

⁷ See, Njenga & Fourie, 2010; Piezon & Ferree, 2008; Valtonen, Kukkonen, Dillon, & Väisänen, 2009; Zhu, Valcke, Schellens, 2009

effects of those discourses. In Chapter 5, I will detail the results of my analysis of the paradigm shift discourse based on my critical reading of Harasim's text in comparison with the actual state of online education practices in the local site of this project.

3.2.2. Local Site: Open University as a Historical Site of Online Education Discourses and Practices

Institution A, established in 1970 by one of the provinces in Canada, is considered as one of Canada's first open universities along with the Tele-University and the former British Columbia Open University (BCOU) (Sweet, 2000). However, since both have later become a part of existing campus-based universities, TÉLUQ became part of the University of Quebec in 2005 and BCOU became part of Thompson Rivers University in 2007, it can be claimed that Institution A is the sole open university in Canada. Throughout its history, Institution A has not only actively guided the growth of DE in Canada but also been largely influenced by different political, social, and economic situations in Canada (Institution A, 2013). In this historical context, different discourses have appeared and have been competing and working with each other creating different regimes of truth in different time periods at the university.

Prior to the beginning of the project, I collected a number of institutional strategic documents that were published between 2010 and 2013 and publically available through the university website (e.g., Annual Reports, Business Plans, Strategic University Plans, and *Open* magazines⁸). I then conducted an initial text analysis (Silverman, 2001) of the documents to search for themes or key words commonly appearing and mentioned in the documents. This initial reading provided me with detailed information about the current status of Institution A including its mission, mandate and value, internal and external contexts, and strategic goals and plans. It also suggested that the mission statement itself constitutes a prevailing discourse in Institution A. An excerpt from the statement is included below:

⁸ The description about this periodical on the institution's website says "*Open* magazine is University's magazine for students, alumni, partners, staff, faculty and friends. If you're thinking about studying with Institution A, *Open* is also a great way to get to know us." (Institution A, 2013)

[Institution A], Canada's Open University, is dedicated to the removal of barriers that restrict access to and success in university-level study and to increasing equality of educational opportunity for adult learners worldwide... Our approach to post-secondary education is based on four key principles: excellence, openness, flexibility and innovation. (Institution A, 2013)

Thus, the university's mission statement was taken up as an entry point to this discourse analysis project. Indeed its mission statement is quite distinctive from those of other large research universities in terms of its strong social and political tendency (Table 3.1, p. 51). Not only the strategic documents but also institutional publications for students and the public are all written, organized, and closely tied to its mission statement. The strong relevance of the mission and principles to its members' perceptions and daily practices was later verified during my interviews with learning designers and instructors in Institution A. All interviewees (detailed explanation about interviewees and interview procedures will be described in the next section) immediately recognized the above passage that I had inserted in the interview questionnaire and made similar comments, such as the following:

- It's a passage I am very familiar with as a learning designer and I've been using this a lot in presentations... one of the reasons why I was intrigued by this university... the notion of openness caught my attention. (Jane, September 25, 2013)
- I have been here at [Institution A] for so long, this mandate is just so basic to me. It has driven probably everything I have done... it's always been kind of in the back in your mind. (Sue, September 27, 2013)
- This must be a mission statement. I know this statement pretty well. (Alex, September 28, 2013)
- I believe in the mission... I think everybody should know what that mission is and understand that's our job. That's what we are doing. (Angela, October 2, 2013)

Thus, the mission statement became the major subject of this study. Among the four key principles, the *openness* and *innovation* principles have constructed the two most salient and dominant discourses of the institutional priorities in Institution A. As an article titled [Institution A]: Conversion from Traditional Distance Education to Online courses, Programs and Services suggests:

In its 30 years of operation, [Institution A] has witnessed the full impact of the growth of online distance education. Its conversion from mixed media course production and telephone/mail

tutoring to a variety of electronic information and communication technologies has been heterogeneous across disciplines and programs. (Davis, 2001, p. 1)

Situating this research in Institution A also made it possible to analyze and compare the openness and innovation principles in both traditional DE and online education institutions as well as trace the changes in the relationships between the two principles during the conversion period. It makes the institution a particularly suitable research site for this study that aimed to look closely into the evolution of the discourses of online education focusing on the continuities and discontinuities between the old DE discourses—openness and innovation—and the new online education discourses.

Among different groups in the institution also including students and administrators, I intentionally selected a group of instructors and learning designers as subjects of my inquiry. Like any other educational institution, instructors (also called academics, professors, and faculty members) and students are the two most important groups involved in pedagogical processes within online institutions. They are the central subjects in the most online education studies. I was aware that including voices of both instructors and students may contribute to developing a more comprehensive understanding of the current status of online education and indeed, a number of readers of my thesis proposal suggested I consider including student participants in the study. However, I decided not to include a student group mainly in order to maintain the feasibility of my study as well as to deepen my inquiry by making its focus clearer. Another important reason behind this decision was that the voices of online instructors have been less frequently discussed in previous studies, particularly in those which are considered theoretically critical, whereas most studies have been exclusively concerned with students' perceptions and experiences.

In addition to instructors and students, learning designers are perceived as an important group in online learning institutions because they are positioned between the external academic field and the local site as well as between instructors and students in the online education context where teaching and learning is largely mediated by course design practices. All designers at institution A have received their graduate degree (either Masters or Doctorate) from the field of online education or other related areas (e.g., educational technology, instructional

design, distance education) which suggests they may have played an important role in transferring their disciplinary knowledge into the disciplinary practices. Learning designers are expected to design online courses based on the online instructional theories that they learned from their own education. Investigating their instructional design experiences in the online institution, actually, helped me construct a better understanding of the relationships between the rhetorical discourses and actual practices in online education.

In this research project, in sum, Institution A served as a historical site of discourses of online education in which I was able to trace how the old DE discourses of openness and innovation have continued or discontinued or shifted in meaning to become the new online education discourses. This local site also effectively served as an interconnected space of the macro level of discourses and the micro level of practices in online education in which I was able to examine the continuities and discontinuities between actual online education practices and these two rhetorical discourses: a) online education increases accessibility to post-secondary education and b) online education improves the quality of post-secondary instruction.

Table 3.1

Mission statements of other large universities in Canada

McGill University: The Mission of McGill University is the advancement of learning through teaching, scholarship and service to society: by offering to outstanding undergraduate and graduate students the best education available; by carrying out scholarly activities judged to be excellent when measured against the highest international standards; and by providing service to society in those ways for which we are well-suited by virtue of our academic strengths.

University of Alberta: Our *mission* is to create and sustain a vibrant and supportive learning environment that discovers, disseminates, and applies new knowledge through teaching and learning, research and creative activity, community involvement, and partnerships. The University of Alberta gives a national and international voice to innovation in our province, taking a lead role in placing Canada at the global forefront. [originally emphasized]

University of British Columbia: As one of the world's leading universities, The University of British Columbia creates an exceptional learning environment that fosters global citizenship, advances a civil and sustainable society, and supports outstanding research to serve the people of British Columbia, Canada and the world.

University of Calgary: As a university we are dedicated to the practice of scholarship which includes both teaching and research. Through research the university makes a direct contribution to society, and through teaching it prepares students to make their contribution. Students are bearers of knowledge for future

generations and partners in discovery with their teachers. We offer to society the understanding and criticism of traditions and established structures, the advancement of science and technology, and the comprehension and development of human intellectual, artistic and physical endowments. [exert form the mission statement]

University of Toronto: The University of Toronto is committed to being an internationally significant research university, with undergraduate, graduate and professional programs of excellent quality.

3.3. Research Questions: Foucauldian Concerns

Following Foucault's methods, I started asking archeological questions and then turned to the genealogical ones. The first and second sets of research questions deal with the archeological concerns about the particular conditions for the emergence of the dominant discourse and knowledge about online education. The third and fourth question sets are genealogical questions to uncover the power effects upon human subjects involved in actual online education practices.

A. From Distance to Online: Openness and Innovation in Institution A

- A.1. How and under which conditions have the discourses emerged and developed in the institution mission?
- A.2. How have the discourses and the relationships between the discourses changed over time?

B. Is Online Education Really a New Learning Paradigm in Higher Education?

- B.1. Which legitimate knowledge and norms have been produced under the discourse?
- B.2. How and to what extent has online education changed the dominant instructional paradigm in Institution A?
- B.3. How and under which conditions has this discourse emerged and developed in the field of higher education?

C. Subjectification and Power Relations of Online Instructors in Institution A.

- C.1. Who are the normalized instructors and what are their relations with the dominant discourses?
- C.2. Who are the problematized instructors and what are their relations with the dominant discourses?

D. Resistance to Moving Online: Multiple Voices and Discursive Struggles in Institution A

- D.1. What are the struggles instructors and learning designers have experienced with the dominant discourses?
- D.2. How has each instructor resisted, or not resisted the dominant discourses?

3.4. Procedures: Data Collection and Analysis

3.4.1. Data Collection

This study has two major data sets including institutional documents and interview transcripts. A large number of institutional documents published from 1977 to 2014 were collected. Most documents published from 2002 were accessible through the current university website. Before visiting Institution A, therefore, I was able to collect most of current public documents including Annual Reports, Comprehensive Institutional Plans, Business Plans, Strategic University Plans, University Research Plan, Information Technology Systems Operation Plan, Undergraduate and Graduate Calendar, Policies and Procedures and *Open* magazine. Other documents published earlier than 2002 were collected during my university visit in September to October in 2013. When I visited a university library on the main campus where all institutional documents were archive, they had been digitalizing all their materials. So, I was able to collect all strategic documents published from 1977 to 2002 in an electronic format, however later in data analysis phase, I decided to limit my reading to the document published between 1985⁹ and 2013.

The second data set is interview transcripts. During my visit I conducted semi-structured interviews with 7 learning designers and 11 instructors. Before the visit, I was able to recruit 6 learning designers and set up the interview schedule by email through my initial contact person at the university who is a faculty member at the Center for Distance Education. On site, I recruited one more learning designer who volunteered to participate in my project. As mentioned earlier, all 7 designers have received either Masters or PhD degrees in the field of DE or the related areas, which demonstrate their strong expertise in online course design. Most designers (n=6) were working at the Centre for Learning Design and Development (CLDD), which supports online course design for the two largest faculties, the Faculty of Science and Technology and the Faculty of Humanities and Social Sciences. The Faculty of Business and Faculty of Health Disciplines have their own course design support groups within the faculties. One interviewee was recruited from the Faculty of Business. Except for one designer, most of

⁹ The first mission statement was written in 1985: “At its fifty-ninth regular meeting on May 30, 1985, [Institution A] Governing Council adopted the following Mission Statement and Long-Term Plan” (Annual Report 1984-85, p. 28).

them had joined the institution during 2000s. Indeed, learning designer is a quite new profession in the institution, which started hiring these people along with the transition from traditional DE to online education. Before, the course team consisted of editors, visual designers, and publishers.

11 instructors teaching different subjects were also recruited on site. I used a snowball sampling method, that is, at the end of interviews with the designers, I asked them to provide one or two names of instructors that they think it would be helpful for me to have conversation with. The reasons why the instructors were suggested as important people to interview were varied, however, I later was able to categorize the recommended instructors into three different groups based on the original explanations provided by the designers why each of them may be a good person to have a conversation: a) Innovative instructors who are leading innovation in online education, b) Effective instructors who are good at online teaching, and c) Traditional instructors who are behind in moving towards online. I sent an email invitation to 19 instructors in total and 11 accepted the invitation and participated in the individual interview (Table 3.2). All interviews were recorded and transcribed and treated as oral text. I repeatedly read the interview transcripts with and against one another. Among 11 instructors, 6 instructors (2 effective instructors, 2 traditional instructors and 2 innovative instructors) who better represent their own groups' characteristics and whose interviews were more rich and informative than the others' were purposefully selected for the in-depth analysis. These six case studies will be discussed in great detail in Chapter 6. The others' interview texts (including interviews with administrators) were used later to cross-validate the findings and to provide a more comprehensive description about the institutional situation during the event of moving the institution from distance to online in Chapter 7.

The interview questionnaire for both learning designers and instructors consisted of 15 open-ended questions. The interview questionnaire for both learning designers and instructors consisted of 15 open-ended questions. The first set of questions asked their opinions about the institution's mission and priorities and the other three sets of questions were about their perceptions and experience of online design and teaching in the institution A. The last section of the questionnaire addressed the current trends in the online education and the important next step for the institution (See Appendices).

3.4.2. Data Analysis

I created an analytic framework in this discourse analysis project based on Foucault's four concepts described earlier in this chapter (i.e., discourses, knowledge, power, and resistance) and then, repeatedly read all the texts I collected that were connected to these concepts. Foucault's historical approach to analyzing discourse at the macro level provides researchers, who are interested in understanding the process of discourse formation, with a comprehensive lens to analyze texts with a focus on larger discursive shifts and their discursive effects (e.g., subjectification and self-regulating practices) over time. However, this conceptual framework does not necessarily suggest specific guidelines, which are useful for the micro level of text analysis. Also, it is less clear in Foucault's account of discourse how multiple historical discourses co-exist and interact with one another in a single text (or in a single location) although such processes can be implicitly informed by using Foucault's own analytic works as guiding models. To support this methodological gap in Foucauldian discourse analysis, I surveyed different text analysis methods used by scholars whose studies broadly can be described as using Critical Discourse Analysis.

CDA is often considered as an effective way to study "social phenomena which are necessarily complex and thus require a multidisciplinary and multi-methodical approach" (Wodak & Meyer, 2009, p. 2). Because complex relationships between a discourse structure and a power structure often cannot be directly analysed, one useful methodical approach to CDA is to analyse "texts" as specific events of language use that is influenced by the dominant social discourse (Sawyer, 2002). CDA expands its analytic scope from linguistic components to a language user's experiences that reflect different social issues related to the power structure (Gee, 2004; van Dijk, 2009). The central question that guides CDA of texts is: "what statements (e.g., arguments and evidence) are used (or left out) about certain social issues or events?" CDA scholars influenced by Foucault's conceptual understanding of discourse repeatedly read texts particularly focusing on the discursive formation of human subjects, which are represented (or unrepresented) in the texts as normal and legitimate (Anaïs, 2013; Jäger & Maier, 2009).

Although texts can be an effective medium with which to analyze a discourse, what appears in the texts is not exactly the same as the discourse itself: "texts and discourse do not have equal effects in the world" (Luke,

1995, p. 18). That is, even though a certain discourse may be dominant in the texts or in global contexts (e.g., public documents or online education literature), it may not be dominant in local sites in which a power structure is embedded (e.g., schools or open universities). In addition, the ways discourse operates in actual educational contexts where dynamic memberships and competing (often conflicting) discourses co-exist can be different from the ways suggested in the texts. For example, results of a CDA conducted by Ryan and Johnson (2009) reveal a mismatch between the discourses of social justice in school curriculum documents and those from interviews with high school students' talking about their lived realities. Comber's (1997) analysis of managerial discourses in authorised educational texts and their effects in a disadvantaged school similarly demonstrates both continuities and discontinuities between the two different sources.

These results suggest that the inquiry of discourse requires "an analysis that examines together macro and micro, global and local... reading public, authorised texts alongside and against those produced by teachers and students in specific local sites" (Comber, 1997, p. 391). To increase the depth of my dissertation project, therefore, I moved back and forth between the global context (the academic field of DE or online education: academic discourses) and the local site (Institution A: institutional discourses and personal voices) and paid more attention to contradictions between the two. For example, I analyzed one of the dominant discourses in the field of online education that enable certain knowledge and norms to be regarded more legitimate (Harasim, 2000) and brought the results into the local site and compared them with the oral interviews texts of learning designers. By repeatedly reading these two sets of texts together, I was able to clearly see the continuities and discontinuities between theories and practices.

To further complement the Foucauldian historical approach to discourse analysis, Bakhtin's dialogism (1981; 1984) was also utilized in this thesis as a supplementary tool to read the texts. In fact, Foucault was not interested in understanding lived experiences of individuals as a speaking subject (nor personal narratives and consciousness) but he instead focused on analyzing social perceptions and institutional practices. However, in order to more deeply investigate individual experiences in this analytic work particularly regarding the discursive struggles among members in Institution A, I strategically included the analysis of their personal narratives in the

interview texts focusing on how they make sense of institutional norms, relationships, and practices. Although Foucault reveals the dominant discourse and its governing power upon people, his account was rather insufficient for this project to unpack the multiplicity of discourses in Institution A where each of my interviews has a distinctive position to, and relationship with, the various dominant discourses (see Chapter 7 & 8). In addition, my interviewees, particularly those who raised critical concerns about the current institutional and social conditions beyond sharing their own experiences and struggles with me, were difficult to conceive of as being only as governed or self-governed subjects within Foucault's framework. Thus, in the genealogical part of my discourses analysis, I decided to take Bakhtin's dialogic approach to understanding the self as a *speaking subject* who creates meaning through dialogue with other people and other discourses. Holquist (2002) elaborates this notion of expressivity and addressivity:

“Ideology” and “social world” are terms best understood in the context of dialogism's emphasis on addressivity. To understand existence as “addressed to me” does not mean I am a passive receptacle into which events fall, as letters drop into mailboxes. Addressivity means rather that I am an event, the event of constantly responding to utterances from the different worlds I pass through. Addressivity implies not only that consciousness is always consciousness of something but that existence itself is always (and no more than) the existence of something... At a basic biological level, thirst does not just exist in the natural world, it happens to me (or, of courses, to you); and lack of water means nothing without the response of thirst. And at the highest level of mental life it is still the case that nothing means anything until it achieves a response. In other words, addressivity is expressivity; what we usually call life is not a mysterious vitalistic force, but an activity, the dialogue between events addressed to me in the particular place I occupy in existence, and my expression of a response to such events from that unique place. When I cease to respond, when there are—as we say so accurately in English—no signs of life, I am dead. (Holquist, 2002, p. 47)

To Bakhtin, dialogue is an authentic process of being through experiencing the world with others (Matusov, 2011; Rule, 2011) and so this process of ideological becoming requires selecting and assimilating other's words, which exist in “other people's mouths, in other people's contexts, serving other people's intentions” (Bakhtin, 1981, p. 294). An individual develops a unique ideological understanding of the self, the others, and the world only through being engaged in dialogue in which multiple forms of ideas, language, discourses are co-existing and interacting with each other (Ball & Freeman, 2004; Hamston, 2006; Kubli, 2005). In line with Foucault, Bakhtin also sees the pervasiveness of power in all dialogic contexts. Bakhtin argues that

dialogue is deeply embedded in stratified socio-historical structures to which individual speakers belong, so its complexity cannot be reduced to considerations of power-neutral linguistic interactions between equal individuals (Holquist, 2002; Roberts, 2012). In this respect, Bakhtin's dialogue is also more closely related to Discourse than to discourse in Gee's (1996) terms. Bakhtin's explanation about multiple discourses (i.e., voices or narratives) that he contextualizes in a single *text* (i.e., Dostoevsky's novel) provides me with a more vivid illustration of Foucault's somewhat abstruse explanation of the social regime where multiple discourses are competing with each other.

Among many other useful concepts in Bakhtin's dialogism, my approach to text analysis particularly draws upon "heteroglossia" that theorizes one of the dialogic characteristics of the novel. This explanation of heteroglossia of a dialogic text in Ryan and Johnson (2009) also corresponds to the general principle of CDA that suggests the necessity of repeated reading of both macro-micro and global-local contexts:

This continuous dialogic struggle between and across discourses is inherent in any text... These intersections between multiple (often conflicting) social discourses within any text or context constitute what Bakhtin refers to as 'heteroglossia'. Bakhtin is not concerned with a simplistic pluralism, but rather with the sophisticated and complicated intertextual relationships between the general and the specific, between the whole and the parts, between the individual 'I' and 'the other' (p. 248).

Bakhtin's (1984) concept of heteroglossia provided an useful illustration of the university as a heteroglossic site where global (social, educational, political, and academic) discourses, local (institutional) discourses, and personal discourses—as well as both traditional discourses in the DE regime and new discourses in the online education regime—are all competitively and collaboratively working to produce certain forms of interactions between its members. With the notion of heteroglossia, the addressivity and expressivity are the most critical conditions of dialogue, which is, to Bakhtin, "an event of being responsible for (and to) the particular situation" (ibid, p. 46). That is, individuals throughout their lives continuously have dialogue, through which they construct their own discursive position within their institution as well as the world. The self as a site of meaning holds its own place and interacts with others outside the space. Therefore, although both the meaning creation and exchanges are mediated by language (or signs), what that same language means, as used by different addressors and expressers may be different according to one's location. This idea is also supported by my interview texts in

which each member appeared to have a different meaning for the same signs such as those of openness and innovation. Bakhtin also escapes from a deterministic view of individual-society binary opposition by “recognizing the danger of going to one or the other extreme” (ibid, p. 49) while pointing out the limits of both official discourse and inner speech. This Bakhtinian illustration of dialogue and the self helped me conceptualize the relationship between the institution and individuals as well as between institutional discourse and personal narratives.

To sum up, when I read the texts in this Foucauldian historical discourse analysis project, including literature, institutional documents, and interview transcripts to address my Foucauldian research questions, I paid additional attention to the unexpected voices, which are different from the dominant ones (whether those are the speaker’s own voice or those cited or addressed by the speaker in the text). This approach was particularly useful for the last set of questions about discursive struggles and resistance to the power relations in the institution (read more in Chapter 7).

CHAPTER 4

DISCOURSE

From Distance to Online:

A Historical Evolution of Openness and Innovation in Open University

This chapter will more closely examine the historical evolution of the two dominant discourses of DE in connection with the historical development of Institution A. The historical literature review on the origin of discourse of online education in Chapter 2 suggested that the two dominant discourses of DE in terms of openness and innovation had been taken-for-granted by many DE researchers and yet they were rather rhetorical than accurately descriptive of the actual state of DE. While the traditional DE had moved to online education in which teaching and learning is mediated by using new Internet technologies the taken-for-grantedness of the two discourses tends to have become even stronger as the current growing expectations about online education suggest. Whereas the DE discourses were previously exclusively appeared in the DE contexts which were more clearly separated from the conventional face-to-face education, the new discourses of online education are associated to a broad field of higher education.

At the same time, while in the previous DE era of independent correspondence study the two discourses were rather discussed in separate contexts, in the online education context it is frequently argued that both openness and innovation can be achieved in a single online education program (Garrison & Kanuka, 2008). However, literatures also imply the complex and often conflicting relationships between openness and innovation in DE institutions, which means that it may not be very easy to achieve both openness and innovation in a single online institution unlike our hope (e.g., Battalio, 2007; Holmberg, 1995; Kanuka & Brooks, 2001). Thus, in this chapter, I want to conduct a more comprehensive analysis of the historical evolution of the two discourses within a single online institution to fully understand their relationships not only at the ideological or conceptual level and at the practical or operational level. Only when we understand how those ideological discourses have emerged and

have actually operated in the particular institution, we can further examine the actual power of these rhetorical discourses upon people's behaviours and practices, which will be discussed in the later chapters of this thesis.

In Institution A with its distinctive institutional identity as an open university the discourses of openness and innovation have emerged and developed in relation to its institutional mission and operational principles of that mission. However, as Foucault (1995) similarly demonstrates in his own work, the ways that openness and innovation are perceived and actually operate in the institution have shifted over time. Particularly along with its institutional transition from a distance university to an online university, there has been a clear discontinuity in the relationships between the two discourses. Therefore, in this first part of this chapter, I will discuss the early history of Institution A in context of the emergence of openness and innovation as institutional priorities. Then, I will move my focus to the two discourses and their relationships in the current regime of online education and then I will explain how they are different from the ones in the previous regime of DE. Following Foucault's archeological approach to analyzing dominant social discourses in a disciplinary institution (Yates & Hiles, 2010) this chapter asks two questions: a) How and under which conditions have the discourses emerged and developed in the institution mission? and b) How have the discourses and the relationships between the discourses changed over time?

The last part of the chapter will bring learning designers' voices into the discussion to better illustrate the complex and often conflicting relationships between openness and innovation in actual instructional design practices. Putting the dominant discourses in authorised institutional texts in parallel to the personal narratives in interview texts of learning designers effectively reveals the disjunction between the ideological discourses and their actual operations in practices (Comber, 1997).

4.1. The Historical Origin of Openness and Innovation in Institution A

Its unique institutional identity as an *open* university suggests the close connection between the establishment of the institution and the historical origin of the discourse *openness* in the institution. Beginning with the UKOU, established in 1969, 20 open universities were established in more than 10 countries for a decade aiming to

increase access to higher education (Peters, 2008). The birth of open universities has been seen as a consequence of well-intentioned and carefully-planned democratic efforts of governments and higher education institutions to provide educational opportunities to underserved and non-traditional groups of students:

The appearance of these open universities in so many countries all over the world since the 1970s *was not a coincidence*. It was the product of the simultaneous occurrence of new pedagogical ideas, efforts to alleviate strong economical needs, the impact of new technical media and the growing awareness of distance education. In the 1960s and 1970s the *movement towards “open learning”* was widely discussed, *governments* explored new ways of producing more graduates for economic growth, the use of television and multimedia in education fascinated *educationists*, and the first academic publications spread the news of the peculiar *advantages of distance education* (ibid, p. 282). [emphasis added]

As the original multi-dimensional mission of the UKOU, which was to be “open as to people, places, methods, and ideas” suggests, achieving or realizing openness is complex in its nature (Lewis, 2002; McAndrew, 2010). Nevertheless, the great imperative of, and enthusiasm for building open universities in the 70s, has led to the relatively simple understanding and unsophisticated operation of openness like the idea of creating opportunity through an open admission policy (Lefranc, 1984). That kind of understanding underlies why the growth of open universities has been often regarded as a clear indicator of increased openness in higher education.

Likewise, the development of the Institution A, the second open university in the world, which was established in 1970 in Canada, is also often considered as a part of this open learning movement. However, to be precise, the evolution of Institution A as a DE institution was *rather coincidental*. The university’s website describes its history as below:

[Institution A] was established by Order in Council of the Government of [the province] on June 25, 1970. Originally conceived as *a traditional campus-based institution*, [Institution A] changed course in 1972 through a pilot project to test the concept of *an open, distance university*. The first [Institution A] course, World Ecology, was offered in 1973, and [Institution A]’s first Convocation, for two graduates, was held in 1977. The university achieved self-governing status as [the province]’s fourth public university on April 12, 1978... Today, [Institution A] is one of the world's foremost and fastest growing online and distance education institutions, serving over 40,000 students worldwide.[emphasis added]

The original concept of the Institution A was not a DE institution but a traditional campus-based institution targeting *traditional* groups of students. In 1970, establishing the province's fourth university was announced by the Social Credit government as a way to meet the rapidly growing demand for post-secondary education. The 1970/71 government budget included sufficient money for the operation of four universities including the establishment of the Institution A. During the preparation of the first draft of the Order in Council in 1970, the Institution A was first given its name, which was originally a name of the student residence, which was planned to be demolished, in one of the campus-based universities in the province.

The government expected the university to focus on undergraduate education since graduate education was seen as a big financial burden. Thus, the original mandate of the university was announced simply as: "the primary purpose of the university will be the development of excellence in undergraduate studies" without any mention of the idea of openness in it (Byrne, 1989, p. 19). In 1971, Timonthy Clarke Byrne, the first president, and other planners prepared the original academic design of the institution as a smaller undergraduate teaching university. In this design, "two major *innovative* instructional approaches" were identified in order to increase more "intimate relationships between teacher and learner" (p. 38). To reduce the size of the instructional setting, a cluster of small colleges and a model of small group tutorials (rather than lectures) were employed in the design, which was criticised as "nothing more than blue skying" (p. 40) by other higher educators for being too innovative and idealistic at that time.

Until August 30, 1971, when the new Conservative party unexpectedly won the election, Institution A, which was still working on its academic design, only had its name and a group of planners but no physical buildings and no budget to obtain them. Soon, the new government expressed opposition to establishing a new university campus, a development that had been approved by the former government. Construction of any university buildings was temporarily suspended for political and financial reasons by the newly appointed minister of Advanced Education. During this period, to make matters worse, university enrolments in the province also declined unexpectedly which appeared to threaten the future existence of the fourth university in any form. In this context, Institution A needed to clearly distinguish the nature of its educational services from those being

provided by the other pre-existing three universities in the province in order to demonstrate the necessity of its existence.

To solve this problem, the university planners proposed a pilot research project to the minister of Advanced Education, to build a mini-college with a new emphasis on lifelong or continuing education for *non-traditional* (or part-time) adult learners. Using this new self-definition, Institution A was also able to avoid any unfavorable competition with other provincial universities and secured its own market. To prove the effectiveness of its new mandate, the university attempted to *increase its enrolments* and mainly for that reason, adopted an *open door policy* for new students without any intention to be a DE institution. Although the minister who had been interested in the lifelong learning approach accepted the proposal, he did not approve the funding for building any *physical buildings* for this uncertain pilot project. Within this challenging political and financial situation, the university's educational service was accordingly or avoidably designed as an independent correspondence model assisted and augmented by other technological media (e.g., audio tape, telephone, etc.):

[M]oving beyond the post office model to include at least some of the media that were currently eliminating distance as a barrier to teaching and learning. This proposed experiment in distance education contained one feature very attractive to government: it would avoid the need for capital expenditure on buildings. (ibid., 1989, p. 50)

Launched in January 1973, during the three-year pilot project period, Institution A created its unique and innovative models for course production (i.e., course team), for courses delivery (i.e., self-instruction and tutoring system), and for student support (i.e., telephone tutorials). Byrne (1989) emphasizes that the development of the pedagogical models of Institution A was a completely separate process from the development of UKOU. In particular, while UKOU spent three years on the careful design and development of its new open educational system, Institution A had to create the entire process within a few months and recruit its first students in October 1973. Throughout this trial-and-error experiment based on the "follow your nose" approach, the university staff were "intelligent, creative and highly specialized" (ibid., p. 55-56). By 1975, the number of registrants reached 725 when the project successfully terminated and in June 1975 the Department of Advance Education announced:

[Institution A] should remain an open university, providing undergraduate courses for such *special groups as the educationally and socially disadvantaged*, and those who, by chance or circumstance, chose not to attend other provincial universities. (ibid, p. 74) [emphasis added]

By this time, the concept of the open university had become more common and so the university was unsurprisingly granted its institutional identity as an open university for the disadvantaged groups in the province. There were two graduates at the first convocation in 1977 and Institution A achieved self-governing status as the province's fourth public university on April 12, 1978. This early history of the university suggests the accidental nature of the origin of the discourse of openness occurring as part of its struggle to establish and maintain its existence. In 1984, the university *finally* established its physical campus consisting of a single office building for its staff on the current main campus and moved its original facilities, built for the pilot project. After moving into its "permanent home," the university set up the first formal statement of its mission in 1985, which was revised later in 2002:

[Institution A] is dedicated to the removal of barriers that traditionally restrict access to and success in university-level studies, and to increasing equality of educational opportunity for *all adult Canadians* regardless of their geographical location and prior academic credentials. In common with all universities, [Institution A] is committed to excellence in teaching, research and scholarship, and to being of service to the general public. [emphasis added]

Rather than having a clear democratic educational origin, openness in Institution A indeed originated from the complex and somewhat arbitrary combination of social, political, and economic conditions although the popular educational discourses in the 70s related to the open learning movement and open universities had certainly contributed to the construction of its institutional identity as an open university. Its first mission statement developed in 1985, a decade after the termination of its initial pilot project in which the institution devised the open door policy and independent correspondence study model and so was granted the open university identity, demonstrates that openness had become a dominant discourse in the institution. In this context, the openness referred to the relatively clear "idea of creating opportunities" through open admission and distance teaching (Lefranc, 1984).

While the term “innovation” did not appear often in any documents up to this point, it was a very salient concept in this adventure story about “building Institution A as an open university”. That is, everything new was deemed as innovative in these early years in the history of the university. The first two definitions of innovation in the Oxford English Dictionary, and which have not been updated since the 1900s are: a) The action of innovating; the introduction of novelties; the alteration of what is established by the introduction of new elements or forms and b) A change made in the nature or fashion of anything; something newly introduced; a novel practice, method, etc. According to these definitions, DE and open universities are innovative from inception in the sense that they created and brought new pedagogical ideas and methods into higher education which had previously been exclusively face-to-face (Keegan, 1996; Moore, 1973).

One of the long-term plans devised with the mission statement says the mission “will be fulfilled by a commitment to identify elements of programs that may be better delivered and supported by the utilization of *innovative* pedagogy and appropriate educational technologies.” (Annual Report 1984-1985, p. 30). Although this was the sole reference to the word innovation in the 3 page long-term plan, and the relationship between the two discourses was relatively clear in 1985. That is, innovation was a way to achieve institutional openness.

4.2. Openness and Innovation in the Era of Online Education

One of the first things that I see on the university website is a photo of the Chair of the Centre for Distance Education. In the photo, this confident and professional-looking middle-aged Caucasian woman in a blue blouse, wearing a blue scarf around her neck, is leaning against a tall bookshelf with her arms crossed. On the right side of her smiling photo, there is a short quote from the interview with her saying; “I’m passionate about providing quality *education for all*,” highlighted in yellow and it is followed by:

Considering her dedication to helping “non-traditional” students — adults coming back to school after a long time away, for example, or students with disabilities — it makes sense that Dr. Marti Cleveland-Innes eventually found her way to [Institution A] and joined the faculty in 2001... “I believe education can help improve life chances and bring people to higher awareness, higher achievements. So I’m deeply committed to the continual improvement of learning environments to increase accessibility, reduce barriers and enhance learning outcomes.”

At the bottom of the page, there is a short caption for her photo that describes her as “an expert and a seasoned traveller in the world of online learning, but she still likes getting lost in the shelves of old-fashioned libraries.” With this caption, I realize the place where she is leaning against the bookshelf in is an “old-fashioned” library. Although it is suggested that she is a faculty member who does distance teaching, other labels attached to her like “doctor,” “expert,” and “traveller” as well as her professional-looking image obscure her identity as a teacher. On the other hand, the terms such as “education for all” or “non-traditional students” imply the typical student body that open universities have been serving from their early years and which are still repeatedly used to emphasize the openness of Institution A.

There are also university graduates’ voices on the website. Kathleen who earned both her bachelor of nursing degree and master of health studies degree says “I could adjust my education to my family life. It was just amazing.” In her photo, captioned, “In the summer Kathleen is often at the family cabin, where the lake is just a few steps away,” she is reclining comfortably on a chaise longue with an open textbook, which looks quite thick. With a smile, this Caucasian middle-aged woman in casual attire is holding the textbook with her hands on her bent left knee. Behind her, I could see a defocused image of a small blue cabin, which is quite different from the typical image of young university student studying at a desk with a textbook (or a laptop) in a library or a classroom. For anyone, it would not take any longer than a few seconds to realize that Kathleen is the *non-traditional* student. Her interview says:

“Here I was in this small town. There wasn’t much activity in the evening with a baby sleeping and my husband working, and the decision was me and the TV or me and the books,” she says. “I couldn’t have gotten more education any other way than [Institution A],” she adds, explaining that classroom courses were all at least an hour’s drive away — a commute that didn’t fit well with her need to take care of her infant son... She took her coursework to her sons’ hockey practices and on camping vacations... Once she worked on an assignment at a campground picnic table as a black bear ambled through the bushes beside her. She was too intent on her work to take much notice and thought it was just a dog until a park warden dropped by and told her differently.

Her successful story of her subsequent career transition after earning her degrees from Institution A is completed by her last remark “I enjoyed my time at Institution A... I haven’t studied for a few years, and I think it’s almost time to go back, because I really miss it. It’s a great way to learn.”

The university’s annual publication, *Open* magazine is also full of successful stories about professors dedicated to open education or related research and about non-traditional students’ learning experiences at Institution A as well as alumni’s professional experiences after their graduation. Family photos and professional-looking middle-aged women and men are the most frequently appeared images in the magazine. As the examples above, and indeed the title of the magazine suggest, openness is still the dominant discourse in the university in the recent years and closely related to its mission.

Openness is also one of the four key principles that guide university’s approach to post-secondary education and it is explained on the university website as “[w]e are committed to our mission of guaranteeing access to post-secondary learning to all who have the ability and desire. If you are 16 or older, you are eligible for admission to undergraduate study.” I can see this principle is well reflected its open admission policy at the undergraduate level:

An open university is one which admits students without regard to their previous educational background or achievements. To enter [Institution A] as an undergraduate student, you must be 16 or older. No other conditions apply. However, advanced programs and courses have academic prerequisites.

Not only in the admission policy but also in all sorts of other institutional policies and documents I see this close connection to this mission and principles. For example, the first goal of its *Comprehensive Institutional Plan: 2012-15* is to increase access:

[Institution A] is committed to increasing participation rates and to ensuring that the university is accessible to students from diverse regions and backgrounds. It continues its efforts to maintain its *visiting student market* and to increase the number of program students from *both urban and rural* areas, particularly in its *graduate programs*. Ensuring flexibility of access through improved information and communication technology infrastructure remains the university’s top priority. [emphasis added]

The meaning of open in the university's original mission statement (or the open learning movement of the 1960s) has still remained strongly in the openness discourse in the university in 2013 and its institutional policies. That is, the university is mainly focused on openness as a way to increase accessibility to university education for non-traditional learners although the target students are not necessarily the socially or economically disadvantaged groups.

However, there is certainly another growing connotative meaning for openness as part of Internet culture that entails the idea of "being available for free". For example, *Open* magazine published in 2013 has a special feature on an *Open Our World* fundraising campaign to support and sustain university's open education services. It says that Institution A has raised 86 percent of its \$30-million goal for the campaign and one of the initiatives for which the campaign is raising funds is the open-access course textbook project. One of the first adopter of the university's open course textbook, available to students online for free, Dr. Michael Dawson supports the initiative and argues "[a]nything that can be done to minimize the financial burden for students should be done."

Open magazine 2014 has a featured article entitled *Shredding an old idea* (p. 25 - 27). The article includes and highlights a voice of Dr. George Siemens, who received an \$861,655 grant through the *Open Our World* fundraising campaign for his research and experiment on Massive Open Online Courses (MOOCs), emphasizing that "openness is part of the DNA of [Institution A]". It continues, however, "Now, 41 years on, [Institution A] and other post-secondary institutions are taking the concept of openness further than those original students could have imagined." In contrast with the first correspondence course *World Ecology* developed in 1973, it argues that MOOCs "are offered free and to unlimited numbers of students. Imagine, for example, a football stadium with bleachers filled by students, and alone professor at the centre of the field." It vividly conveys a new idea of openness organized around the concept of Open Educational Resources (OER), which are "free and accessible learning resources available on the Internet. No matter what they look like or how they're delivered, they share a common trait: openness."

The four central principles of Institution A including excellence, openness, flexibility, and innovation first appeared in the 2008-2012 Business Plans. The original version of the principles, in which innovation was not included, were only three: accessibility, flexibility, and excellence (Annual Report 1995-96). Innovation is later defined as the last principle guiding university members to “continue to adopt and develop new, learner-centred learning models and technology-based alternatives to traditional, classroom-based instructional channels and context” (Open, 2008, p.4). Being innovative in 2013, according to this description, does not seem very different from the 1985 long term plan descriptions utilizing “innovative pedagogy and appropriate educational technologies” except for the fact that the term innovation is now explicitly distributed and emphasized, which was not the case until 2002. Thus, similar to the openness discourse, innovation can be argued as having always been a part of AU:

From its beginning in 1972, AU has pioneered new approaches to post-secondary learning: through its open philosophy, through its outreach, through its revolutionary methods of course and program design and delivery and through its acceptance and adoption of technology-based alternative... (p. 11).

As the above excerpt from the *2008-2012 Business Plans* suggests, there have been two major types of innovation commonly mentioned in different institutional documents: pedagogical innovation and technological innovation. As mentioned earlier, in the early years of the university, the both pedagogical and technological approaches to innovation were mostly discussed as a means to increase the accessibility to university education. That is, the innovation discourse was often positioned as a factor supporting its open mission in those years.

However, there were two institutional conditions that brought this discourse to the foreground of the university’s mission, vision and goals, which were the financial difficulties and the advent of online technologies during the mid-90s. The *Annual Report 1994-95* mentions:

In the context of a 31 percent reduction (\$5.4 million) to [Institution A]’s provincially funded operating grant over fiscal years 1994-95, 1995-96, and 1996-97, the university took deliberate action to restructure and reposition itself. All staff members accepted a five percent reduction in salary... faculty teaching loads were significantly increases and tuition fees rose by 8 percent... These changes, together with other cost-saving measures, allowed the university to redirect \$800,000 annually to teaching and innovation. (p. 5)

The 1994-95 was a year for the university to experience important changes. Institution A was initially planned by the government under the provision of the Order in Council as an undergraduate institution and thus any development of graduate programs without an amendment to that Order in Council was forbidden (Byrne, 1989). Until September 1994 when two graduate degree programs (i.e., Master of Distance Education, Master of Business Administration) were first offered, it had remained as an undergraduate teaching university for more than two decades. However, in the complex interplay of government's cutbacks, enrolment increases, financial and managerial expectations from the government, and a growing demand for graduate studies, Institution A expanded beyond undergraduate teaching. The success of both online graduate programs has brought about the international recognition of Institution A as a world leading open university specializing in online education:

Canada's first complete electronic MBA offered an exciting alternative to students by allowing them to choose to learn in an electronic environment... the university introduced the Master of Distance Education in response to growing demand for formal training in distance education as national and world-wide interest in this method of learning continued to boom. (Annual Report 1994-95, p. 8)

Thus, the successful adaption to changing social economic conditions as well as the rapid adoption of online technologies in its advanced programs increased the focus on innovation at Institution A around this time. The following year, the university introduced its new trademark "Canada's open university," which was later inserted in the 2002 revised mission statement. Since then, as the last sentence in the above excerpt demonstrates, a changed (the third) conceptualization of innovation, which is focused on research rather than teaching has rapidly emerged in the university. Indeed, the *1996-97 Annual Report* acknowledges how three research projects received important external grants:

Although a small, primarily undergraduate teaching university, [Institution A] has fared very well in attracting external research grants as well as in providing internal funding of research and development. For example, professors Jeffery Taylor... and Peter Holt are part of a \$5.6 million Canada-wide research project to identify the links between learning and economic success; between training and Canada's international competitiveness... History Professor Jeremy Mouat was awarded the prestigious Jules and Gabrielle Léger Fellowship by the SSHRD- the first [the province] scholar to receive the award... (p. 12-13)

Also, the *1997-98 Annual Report* was the very first document that had a separate space for celebrating individual staff publications. A decade later, the *2008-09 Business Plans* outlines six strategic goals in line with the four key principles and one of the goals is “to foster and expand research and scholarship” (p. 25). Seven strategic objectives and their corresponding performance measures explicitly promote the value of innovation in terms of “increase in number of research projects and publications as well as increase in amount of research funding received”. One notable university mission-oriented objective was to “provide the widest possible access to the research created by researchers at [Institution A]” and outcomes such as establishing University Press, which is “regarded as a leading open access press” was indicated as expected results. In 2008, [Institution A] Press was actually established and released its first open resources:

[Institution A] Press is the first university press to be established by a Canadian university in the twenty-first century. We are dedicated to the dissemination of knowledge and research through open access digital journals and monographs, as well as through new electronic media... In keeping with [Institution A]’s mission of overcoming barriers to education, we intend to work with emerging writers and researchers to promote success in scholarly publishing. (2014)

In this recent scenario, innovation is not a subordinate means to promote openness but rather has become an independent value in the collaborative relationship with openness. The independence of the research-focused approach to innovation continues to be advanced, illustrated clearly in another featured article in *Open* magazine 2014, *From Discovery to Market*. This article stresses the importance of converting research outcomes into marketable products using the voice of an educational technology industry liaison officer:

Transferring research innovations into the marketplace can have transformative societal impacts, improving quality of life as well as enhancing business productivity and job creation... Together, these research efforts provide industry partners with a competitive advantage, create job, improve technologies and help ensure future prosperity, while advancing research and improving the health and social welfare of Canadians. (p. 23)

With its new brand “everywhere”, Institution A is currently striving toward its “mission to remove barriers to post-secondary learning so that everyone, everywhere can take part” as well as “focus[ing] on the future of learning, not merely responding to change, but leading the innovations that inform the change” (Open, 2014, p. 9).

In conclusion, in 2013-14, I have argued that the two dominant discourses in Institution A are openness and innovation. Although neither ideas are new to the university, the current understandings of those discourses have expanded and shifted from the initial discussions of the two concepts. The new approach to openness emphasizes making educational resources available for free beyond providing access to university education. Innovation is now understood in the context of producing new knowledge and connecting that knowledge to actual profits, not only for the institution but also for the broader society. These new approaches to openness and innovation have resulted in the construction of a more dynamic and complex relationship between the two discourses than any time in the history of Institution A.

Before moving to the next section, however, I want to also note that the current understandings of openness and innovation not only in Institution A but also in the broader field of higher education are closely linked to multiple other global and social discourses including globalization and knowledge economy. Innovation, in particular, has been a rapidly growing value in general education including the K-12 sector (Philip, 2014).

Technological innovations have radically changed [human society]... Openness is a fundamental value underlying significant changes in society and is a prerequisite to changes institutions of higher education need to make in order to remain relevant to the society... Increasing degrees of openness in society coupled with innovations in business strategy like dynamic specialization are enabling radical experiments in higher education and exerting increasing competitive pressure on conventional higher education institutions. (Wiley & Hilton III, 2009, p. 9)

Wiley and Hilton III in a recent article mention at least four different sources of innovation that are relevant (or necessary) to current higher education institutions: new technologies, new pedagogies, new administrative (or business) strategies, and new knowledge. Many online DE scholars who are particularly influenced by economic or organizational theories (e.g., Porter, 2001; Stacey, 2000; Woudstra & Adria, 2003) have argued that DE institutions need to continuously innovate their system, process, and practices in order to achieve their mission of openness. Thus interestingly, unlike its early years when DE was perceived as innovative simply because of its open educational practices and policies, at present, it is asked to be innovative so that it can achieve openness.

Since both openness and innovation have been always relevant to DE and frequently discussed in the field from its beginning, they now tend to be regarded as natural attributes of online education and simply used without much effort to fully understand the multi-dimensional meanings of those buzzwords. However, given the growing importance of the two discourses as guiding principles in the field of online education as well as their continuously involving meanings and interrelationships, it may be important to better understand what we mean by the words and how they operate in the specific context of online instruction. For the reason, the next part of this chapter analyzes the interview texts of learning designers working at Institution A. Personal narratives can provide more precise account for the ways how the dominant discourses are operating and realized in the actual instructional practices because the ways the discourses are defined in the public or authorised texts may not be the same with the ways the members perceive and talk about them (Comber, 1997). Table 4.1 summarizes the major changes in mission, principles and brand of institution A between 1984 and 2014.

Table 4.1

A Summary of the Historical Changes in Mission, Principles, and Brand of Institution A

Year	Mission-Related Changes and Events [Brand]
1984 - 1985	[Open learning for all adult Canadians] <ul style="list-style-type: none"> • Mission Statement and Long-Term Plan were adopted • Two significant developments in outreach during the year just ended were the launching of the paced Enhanced Delivery program and the prison program (p. 4)
1986 - 1987	[Learning for Life]
1992 - 1993	[Learning without Limits]
1993 - 1994	<ul style="list-style-type: none"> • “Over the past five years [Instruction A] experienced both rapid growth and a marked change in the characteristics and needs of its student population. [Instruction A] responds to these challenges through flexibility and technological <i>innovation</i>.” (p. 3)
1994 - 1995	<ul style="list-style-type: none"> • Individualized learning through Open and Distance Education: “[Instruction A] is one of the world’s leading open universities specializing in DE. By focusing on innovation in learning, AU makes it possible for people to earn a university education regardless of where they live or work, or their commitments to families or career.” (p. 1) • Promoting Accessibility through Technology: “To provide greater choices and to enhance access to university education, [Instruction A] launched two courses on the Internet: computer Information Systems Projects and Basic Composition.” (p.7)
1995 - 1996	<ul style="list-style-type: none"> • Three Key Principle “Accessibility, Flexibility, and Excellence” appeared
1996 - 1997	[Canada’s Open University] <ul style="list-style-type: none"> • “It is fitting that [Instruction A] is called Canada’s Open University. We are ‘open’ because our students benefit from a learning environment that accentuates, among other factors, open admission, self-paced study, year-round enrolment, and maximum course choice and program flexibility. Furthermore, student benefit from our individualized approach to teaching and learning because they control their own learning environment.” (p. 2)
2002 - 2003	<ul style="list-style-type: none"> • Mission is rededicated as it is in 2013 • Eight Values “excellence, learning, scholarly research, free exchange of ideas, openness and flexibility, diversity and inclusiveness, employees, and accountability” appeared • “[Instruction A] continues to stand out as North America’s distance learning leader in best practices and the most innovative uses of technology.” (p .3)
2008 - 2012 Business Plans	<ul style="list-style-type: none"> • Four Key Principles “Excellence, Openness, Flexibility, and Innovation” appeared • “[Instruction A], Canada’s open University, provides learning for life. [Instruction A]’s approach to post-secondary learning is rooted in its dedication to four central principles: excellence, openness, flexibility and innovation.” (p. 10)
2014 Open Magazine	[Everywhere] <ul style="list-style-type: none"> • “[Instruction A] has a long history and a credible reputation, but in a rapidly evolving and competitive marketplace, reputation can’t be assumed; It has to be claimed and given shape every day... if [Instruction A] were to continue to lead in online distance learning, we must differentiate ourselves by saying something our competitors couldn’t say... Bold, strong brands do better in tough economic times, and post-secondary education has had a tough time as of late... [Instruction A]’s 40+ years of distance

education history, combined with a fresh and bold brand, creates and innovative, quality learning experience... open for everyone... everywhere. (p. 9)

4.3. Personal Narratives: Openness and Innovation in Instructional Design Practices

The interviews with 7 learning designers provide a detailed understanding of the two discourses that have currently been dominant in Institution A. This section will summarize the rich discussions about what openness and innovation as central institutional principles mean to learning designers as well as the complex relationships between the two in their instructional design practices in the institution. As Helen mentions before unpacking her thoughts about the innovation principle, there are different approaches to innovation among the institution's members according to their positions, responsibilities, and interests:

I think learning designers have very different ideas from faculty. Maybe part of our [learning designers'] mission is to persuade faculty to buy into our idea of what *learning innovation* is and I am sure administrators have different idea. I am not sure but I think at this point, with all our funding problems, they are thinking about innovative ways to raise money basically. So we all have to, every group has a different perspective and different motivations in terms of innovation. (Helen, October 2, 2013)

Of course, there are also different understandings about the two principles among these 7 learning designers. However, learning designers as a single position group having the same responsibilities and interests in online instructional design have more consistent ideas than the faculty group having wide discrepancies in their instructional beliefs and foci. The designers have a relatively common and coherent idea about openness, which involves “ensuring access to students of all differences whether they are geographically dispersed, whether they are rich or poor, whether they are having to work full time, so it's access on a variety of levels” (Sue, September 27, 2013). Along with removing other kinds of barriers, most of them also emphasized the current view about openness embedded in the recent OER and MOOCs phenomena such as “being available for free”. Both Alex and L Helen strongly argue that:

We try to actually apply this [openness] in things like [Institution A] press, which is open press. You don't have to pay for books so they try to contribute to this culture of openness in academia because it's very important because more and more things are being monetized. (Alex, September 28, 2013)

The cost of education is getting ridiculous. As long as it's sort of... it's a way of collectively taking back what made in the first place, many of these things are funded by tax payers, there is no reason that tax payers shouldn't benefit from that... we kind of like open source software so we use Moodle and Alfresco. (Helen, October 2, 2013)

All designers seemed to believe that being innovative (i.e., creating something new), is a necessary, valuable, and mission-oriented practice at the university. However, it seemed more challenging for them to define innovation in a coherent way than the way they did for openness. The earlier analysis of institutional documents suggested that there are at least three interrelated approaches to defining innovation: research innovation, pedagogical innovation, and technological innovation. During the interviews, these three approaches tend to be separately explained in two distinct contexts: either in terms of utilizing new pedagogies or technologies in courses or in terms of creating new knowledge based on research activities.

Innovation again, one of those key universal terms, very popular, very trendy... really fuzzy terms that everyone embarrasses... Innovation here in this context, at the most basic level, it means to move from a print to an online education environment... It's this balance between how to use technology to facilitate learning... So in that push for innovation and there has been a lot of experimentations, a lot of pilot projects. (Jane, September 25, 2013)

Innovation is tricky term, but really it means in a very traditional sense of pure research by academics contributing to their field because [Institution A] in [the province] even though we are mostly distance university, is one of the four research universities in the province. Behind innovation is really research and it's important that there is some sort of innovation and people are creating things here because of research mandate. Otherwise, if we didn't have this research-based innovation... we wouldn't be better than the few other colleges. (Alex, September 28, 2013)

Two significant tensions related to the two discourses appeared repeatedly in the interview texts. These two tensions are: a) a tension between the two principles *at a course level* and b) a tension between knowledge innovation (research) and technological or pedagogical innovation (teaching) *at an institutional level*. These tensions are either specifically mentioned by the interviewees or implicitly suggested throughout the conversation. As independent principles, the value and importance of both openness and innovation are relatively well articulated by all designers. However, when they were asked to consider the two in parallel and prioritize them and particularly speak about their relationships, 5 of them expressed difficulty. Many parts of the interview texts suggest that the continuing tension between the two principles at a course level, which does not seem easy to

alleviate without giving up one out of the two as Jane says, “It’s a trade-off, really a trade-off.” Another designer, Sue, explains this tension in great detail:

One of the challenges of course when you are going online you are opening the doors to many people but you are closing the doors on others. So sometimes the old-fashioned paper technologies are actually more accessible for some people than all the electronics... I did in fact have a student who is living up out in the North West territories and she can’t always access even a YouTube video. So that’s streaming media supposedly everybody around the world can access but that’s not entirely true... There is the whole marketing and there is the administration where they want to use these buzz words like innovation. To be honest, I don’t think most of them are aware of how the technologies function, the pedagogies underlying the different technologies work... So there are times when the competing services people asked to develop something that the rest of us were thinking, “that doesn’t make any sense”... This desire to innovate while maintaining it open does kind of fall on the shoulders of the learning designers. We don’t introduce the innovations into day-to-day practices. We don’t use our students as guinea pigs. So we might introduce something in a part of research project... sometimes those things are put in place but it’s harder to develop the project and then uptake. The actual adoption of the tool can be very sluggish. (Sue, September 27, 2013)

Sue concludes her argument by stressing the importance of a student-centered approach to instructional design as, “the balance between innovation and maintaining openness, to me, it is all about students.” However, at the same time, most designers, including this designer in another part of her interview, also mention the arbitrary (beyond diverse) nature of student expectations towards innovation.

We have a self-paced model at the undergraduate level... [most students] just want to go through their course and not necessarily have any interactions whereas some pedagogical principles now are all about constructivism, social learning, peer-to-peer exchange. So there is a big push for that and yet the reality is we do have large student populations who are resisting to it... they just want to be a lone learner... Even if they don’t necessarily understand everything in terms of technology, they do expect to see a range of the use of technology. But at the same time, they still want the personal attachments and personal guidance—sort of all the good elements of traditional distance education. They still want to have that kind of one-on-one touch with the tutor. (Jane, September 25, 2013)

Most undergraduate courses at Institution A are self-paced, which allows students continuous access to enrol in the courses and to determine their own learning schedules. This has been another important open admission strategy at Institution A, which has also contributed to its increased number of enrolments. During a six month period of registration, students can submit course assignments anytime in order to receive credits and so

these self-paced courses are mostly designed as independent study without much interaction among students. This course structure provides the *anytime* access that is strongly valued in current open education discourses. At the same time, however, these self-paced courses involve a large number of students in different learning phases making it difficult to have group communication opportunities that are commonly perceived, in current online education literature, as a necessary component of the more innovative constructivist instructional model than independent study model. Various instructional issues caused by this typical course structure will be discussed in Chapter 5 more in detail. In sum, although the two discourses co-exist at the ideological level as if they are two independent but collaborative principles, it has been challenging for learning designers to operate the both principles in their instructional design practices.

The second tension related to openness and innovation is mostly represented as the conflict between teaching and research in Institution A and much conversations end up falling into the question of whether it is a teaching university or a research university. All four learning designers below express their concern about the rapidly increasing focus on research activities in the institution:

[Institution A] increased research agenda because it was perceived mostly as being a just teaching university and *teaching in higher education has never been historically valued*. It's always been about what you research and publish and that is a part of the trend I've seen in the last 10 years... pushing, going beyond being perceived just as a teaching university and increasing, raising the profile of the researchers and their research agenda beyond just distance education. (Jane, September 25, 2013)

I think research is essential... but as we went through a period of growth, we went through sort of move to make ourselves look more like a conventional research university... I was always a little concern when I heard people talk about how we want to look more like conventional university because we are not. So do we want to be a number five in a line of the conventional universities? We used to call ourselves Canada's open university. Have we given up that dream, that role? Is it too hard to *sell* because people don't understand especially funders don't understand that concept? ... Our job is *teaching*. That's our core competence. (Angela, October 2, 2013)

There is innovation but there are more and more pressure to make innovation more applicable to business and so there is a lot of pressure right now. You have researchers, academics, even professionals are doing research here but there is more demand, push from the government to make that research economically profitable in some ways more and more I find. (Alex, September 28, 2013)

The research component is fairly recent as I understand it, that they are trying to upgrade themselves as more of research institution, but I think basically, teaching was the reason they came into existence in the first place... but the problem is like it's not just research. Computer sciences, they are just like everyone is an entrepreneur, too. They've all got their own *business on the side*... It's like everybody is so busy with their research and their whatever else they are doing on the side. Some of them actually resigned taking time to develop the course and even if they have the help and support of our department [the Centre for Learning Design and Development], they just don't want to be bothered spending more than the minimum of time for which really should be central to their role. (Helen, October 2, 2013)

When the learning designers initially talked about the notion of innovation, they had much more positive attitudes towards it even including the idea of research-focused innovation. Most of them regarded innovation as imperative or part of the mission of all higher education institutions including open universities. However, when it came to the question about a choice between teaching and research, the complexity and the multiplicity of the innovation discourse even within the same designers' narratives are revealed. Particularly, the interview texts demonstrate that the conflicting understandings about research-focused innovation exist within the institution. These conflicts seem to be most salient between faculty mainly focusing on disciplinary research (and further business) and learning designers mostly concerning online course design and development (and eventually students).

It can be argued that there are competing discourses about innovation among learning designers, and these seem to be that: a) innovation is one of the central university principles that we need to strive for, b) however, if online education is too innovative either technologically or pedagogically, then it may not be as open as it is supposed to be; therefore, we need a balance between being open and being innovative, and c) too much emphasis on research activities is problematic since it possibly reduces the quality of teaching activities in the university where innovation in teaching needs to be its priority. That is, the unique identity of the open university both as a research university and a teaching university produces competing discourses about openness and innovation. The mission statement, one of the central institutional documents that initially contributed to the emergence and circulation of these discourses throughout the university has not helped to reduce the conflicts particularly in the recent competitive context. However, despite all the conflicts discussed above, after all, it seems like that the innovation principle is much more emphasized than openness. The last excerpt is from the interview text with Alex

who earlier stated, “[Institution A] in [the province] even though we are mostly a distance university, is one of the four research universities in the province.”

There is a lot more competition. It’s a *business*. It’s really, really getting tough and to survive, you have to move faster, way faster than we do here. Now I do believe we need academic excellence here and I understand when academics stress that. I totally agree but from my perspective as a learning designer and having to work with technology, if we are slow, we just kind of lose. Doesn’t matter how good our academic standards are. (Alex, September 28, 2013)

4.4. Conclusion and Discussion

Many of the findings in this chapter are consistent with my previous arguments in Chapter 2. Institution A was initially planned as a *traditional* campus-based university, however, in the arbitrary political and economic situations during its establishment, the university planners had to shift their focus to the *non-traditional* student group. In this way, they were able to maintain their existence while avoiding unfavorable competition with other established universities for student enrolment. That is, this case can support and further explain the argument in literature that open learning movement in the 60s and 70s was heavily influenced by diverse political and economic interests rather than being led by fully democratic motivation of empowering the underserved (e.g., Harris, 2008; Sumner, 2010). Nevertheless, openness became its central priority and operated through the open admission policy and independent correspondence study model in Institution A similar to other university universities.

For the first two decades the conceptualization of openness and innovation and the relationships between the two had been fairly clear. As its first mission statement established in 1985 demonstrates openness as a institutional priority was to provide educational opportunities for all adults and innovation was rather a supporting mechanism for the educational accessibility through pedagogically or technologically advanced DE delivery. That is, during the early years of Institution A when it was entirely based on the independent correspondence study model, “opening the door of higher education to non-traditional students” was certainly the dominant discourse.

However, since the mid-90s when Institution A (as other open universities in Black, 2013) has faced serious financial difficulties, the relationships between openness and innovation have changed. The discourse

“technological innovation leads pedagogical innovation in DE” started to more commonly appear in different institutional documents as an independent dominant discourse. Additionally, in order to secure their funding level, the university moved its central focus from openness to innovation to include both technologically-mediated pedagogical innovation as well as research-based knowledge innovation. Establishing the first online graduate programs and promoting funded research projects can be seen as the university’s bifurcated effort to realize the innovation principle during this period.

Most recently, there has been rapid growth in the new approach to the openness principle, which is related to OER initiatives that make educational materials available for free largely through the Internet. The institutional documents still portray their students as non-traditional adults who are internally motivated and self-regulated and celebrate their academic and professional success through the university programs. However, within the new direction of openness to provide *materials* rather than *education*, its original democratic mission as an *open university* to serve the underserved population seems to have blurred. Instead, Institution A as an *online university* currently tends to focus more on the general population. On the other hand, the new research-oriented institutional culture that faculty members are frequently illustrated as researchers or experts than as teachers suggests that the earlier teaching-oriented approach to openness and innovation has been shifted to the research-oriented one. In this institutional situation, as the learning designers claimed, some faculty members are actually neglecting their teaching and exclusively focusing on research or other for-profit institutional activities.

At the operational level, at the same time, its instructional efforts to achieve pedagogical or technological innovation have unintentionally brought about the conflicting results in reducing openness of their programs. For example, moving the independent correspondence programs online may have deprived some disadvantaged groups without access to Internet of distance learning opportunities as well as adopting new technologies would less likely to increase the educational accessibility for the underserved. Pedagogical innovation using constructivist instructional theories also tends to prevent a large group of underserved students who are often unprepared for the advanced courses from having successful learning experiences in their online courses. These findings demonstrate the difficulty of increasing both openness and innovation in a single online program as well

as further confirming that the prevailing discourse about online education as increasing both accessibility and the quality of post-secondary instruction is not true at least in the open university context.

CHAPTER 5

KNOWLEDGE

From Rhetoric to Doctrine: Is Online Education Really a New Learning Paradigm?

In this second findings chapter, I will move my focus from the history of the discourse of online education to a set of knowledge, thoughts, and statements which is counted as truth in the current regime of truth in the field of online education (Foucault, 1995). To Foucault (1980), among multiple competing discourses in a particular social regime, the dominant one produces a regime of truth that further decides which knowledge, thoughts, and behaviours are legitimate and which are not. In this perspective, knowledge is not objective or universal truth but a subjective and historical product of dominant discourses. Nevertheless, knowledge, particularly disciplinary or academic knowledge (i.e., theories) is generally considered truth and plays an important role because dominant discourse exerts discursive power upon people's lives (Foucault, 1990). In other words, discourse and practice is mediated only by knowledge (i.e., knowledge apparatus) that creates and circulates certain norms into a disciplinary institution and further influences the development of institutional regulations.

In previous chapters (Chapter 2 and 4), I discussed the discontinuities between the dominant discourses of DE and the actual state of DE and demonstrated that our current understandings of online education are largely based on the rhetoric about DE (i.e., openness and innovation). Ironically, although the disjunction between rhetorical discourses and actual practices seems to be larger in the current online education regime than it was in the traditional DE regime, the taken-for-grantedness of the discourses has been continuously increasing since the advent of online education. The primary concern of this chapter is to identify the broader legitimate knowledge and norms about online education and more specifically online instructional practices. In the academic field of online education for the last two decades a vast volume of research has been conducted, through which much knowledge has been produced. No matter whether such knowledge is true or false, it has also been circulated into higher education institutions and has influenced online education practices.

Therefore, in this chapter, I will look at the online learning literature broadly and focus specifically on examining one of the dominant academic discourses about online education as a new learning paradigm in higher education and analyze a set of knowledge (i.e., instructional theories) produced that was based on this discourse. Then, to address the question “Is online education really a new learning paradigm in higher education?” I closely looked at the continuities and discontinuities between the discourse and actual practices in Institution A. To understand how and to what extent the rhetorical discourse has influenced instructional practices, I paid particular attention to the group of learning designers who are expected to utilize the disciplinary knowledge in their practices in Institution A. My analysis of the learning designers’ personal narratives about their practices in 2013, more than decade after the emergence of the paradigm shift discourse, suggests that moving online has not shifted the instructional paradigm in Institution A and the currently popular instructional theories are actually conflicting with the actual instructional conditions in the open university. The last part of this chapter will discuss the different social and academic conditions that have enabled the rhetoric to emerge and develop in the field and further become the current doctrine of online education including norms and rules.

Following Foucault’s archeological approach to analyzing dominant social discourses in a disciplinary institution (Yates & Hiles, 2010) this chapter asks three questions: a) Which legitimate knowledge and norms have been produced under the discourse? b) How and to what extent has online education changed the dominant instructional paradigm in Institution A? and c) How and under which conditions has this discourse emerged and developed in the field of higher education?

5.1. The Manifesto of the Paradigm Shift in Learning

Affirming online education as a new paradigm in learning, Linda Harasim (2000) in her article *Shift happens: Online education as a new paradigm in learning* presents an overview of the development of online education with several historical milestones (e.g., the invention of the World Wide Web in 1992) and significant “firsts” in online education activities that contributed the paradigmatic shift. She summarizes the relatively short history of online education as:

In its vibrant 25-year history, online education has tackled tough questions and developed various models to try to understand how new methods of learning and teaching can be *effective, exciting,* and relevant. But while developments in the 1980s and 1990s prepared for a *revolution* in the field of education, most of the *noise* generated in the media questioned the value and quality of online education and expressed the concerns of some faculty who felt they would be displaced by less well-trained staff. [emphasis added]

In the passage above, she characterizes online education very positively as “a revolution in the field of education” while describing the questions or concerns about online education more negatively as “the noise”. Throughout her article, she persistently uses progressive words such as “new” (37 times with paradigm, understanding, approach, modes, forms, methods, etc.), “change” (17 times), and “shift” (16 times) to emphasize how online education is fundamentally and paradigmatically different from traditional face-to-face education as well as different from traditional DE mediated by other technological media. Her favorable attitude towards online education is also explicit in her language use of the terms ‘effective’ and ‘exciting’ for characterizing the pedagogical changes in higher education facilitated by the development of online education. In fact, this positive attitude towards online education commonly appears in other online education literature published close to the year in which Harasim’s article was published (see Clark, 2001; Haung, 2002; Kekkonen-Moneta & Moneta, 2002)¹⁰.

According to Harasim, online education provides “new modes of educational delivery, new learning domains, new principles of learning, new learning processes and outcomes, and new educational roles and entities” (p. 45). These definitely new features of online education, it is argued, not only increase accessibility to higher education (i.e., openness) but to also improve the quality of higher education (i.e., innovation). She explains that because innovative networking technologies enable many-to-many communication to happen any time and any place, even using a small degree of online networking (e.g., e-mail and computer conferencing) can enhance the quality of learning in both face-to-face or distance education contexts. To Harasim, online networking is also fundamentally different from (better than) the face-to-face one with regard to its democratic nature:

¹⁰ For example, Clark (2001) discussed the advantages of online learning environments to provide more learner-centered learning experiences by stimulating learner collaboration and discussion and Kekkonen-Moneta and Moneta (2002) presented their comparative case study result that suggests online education fosters higher-order learning compared to lecture.

Online interaction thus displayed fewer of the extremes typical of face-to-face class activity such as excessive or dominating input by a few and little or no participation by everyone else in the class. Online environments do not entirely eliminate the more vocal participants. What is new and different is that conferencing ensured that dominance by a few does not prevent others from having their say. (p. 49)

Although the degrees of networking used as a learning component in online education can vary considerably, she nevertheless argues that online education is a revolutionary form of higher education extending in quality beyond the boundaries of DE:

Online education is not the same as distance education, although it shares some of the same attitudes. Both are any place, any time, and largely text-based. However, the critical differentiating factor is that online education is fundamentally a *group communication* phenomenon. In this respect, it is far closer to *face-to-face* seminar-type courses. (p. 49-50) [emphasis added]

She also specifically points out that asynchronous collaborative online learning is more effective than face-to-face seminars because it provides “24/7 access expanded air time for discussion and reflection, allowing everyone to have a voice, overcoming challenges, and traditional discrimination factors, such as ageism, sexism, and racism” (p. 54). However, it is important to note that she has a selective position towards different models of online courses, which appears in her comment on the effectiveness of two basic models of online courses:

Ironically, the technological solutions provided by the Web also introduced *new problems* or exacerbated existing ones... Two basic models of online courses thus emerged: one based on collaborative learning and interaction, and the other based on publishing information online... The second, based on *the old model of transmission of information or lecture mode* seemed to flourish during the late 1990s, but then its weaknesses became evident. At the same time, new tools and environments customized for education based on educational interaction and collaboration were emerging. (p. 52) [emphasis added]

This clearly implies that the idea of the learning paradigm shift in higher education is much more complex than simply adopting online education or Internet technologies. Despite a certain level of pedagogical potential that online networking technologies offer, it is not necessarily right to characterise all forms of online education as new or more effective pedagogical approaches to higher education. Online lectures without networking opportunities, for example, can be perceived neither as a new nor as an effective pedagogical approach. Reasonably, therefore, she calls for a collective effort to “intentionally” shape the paradigmatic shift in higher

education through designing online courses based on three interrelated principles, which are collaboration in learning, access to lifelong education, and constructivism (or knowledge work):

Humans have experienced several paradigmatic shifts, but they have never intentionally shaped them. Today, we have the unique opportunity and responsibility to engage in designing, at least to some degree, the world that we, and future generations, will inhabit. (p.52)

She suggests “the concept of producing knowledge by collaborating in groups” (p. 54) as encapsulating the essence of the new learning paradigm that online educators including designers, researchers, and instructors need to bring into higher education context. However, this call indeed indicates that the paradigm has not yet shifted and it inevitably calls into question the validity of her earlier claim that online education has shifted the learning paradigm in higher education.

Nevertheless, without clearly addressing these potentially self-contradictory issues in her article, Harasim reinforces her argument by presenting a large set of empirical data collected from her own research project on the Virtual-U, a Web-based learning environment in which over 15,000 students and 220 instructors participated in over 439 courses. For example, she mentions that 100% of Virtual-U courses incorporated some form of networking and collaborative learning activities and students actively participated in those activities and then claims that these courses produce entirely new learning patterns in higher education:

75% of the students logged in at least 10 times per week and 88% logged in at least 5 times per week to read and write messages or to access resources. Seventy-seven percent of all students in the courses studied posted at least three messages per week... In all the courses studied, learners logged on at all hours of the day and night, and there was no hour when the system was not being accessed. (p. 56)

Based on similar descriptive data from her Virtual-U project, she further insists that the virtual university in comparison with the physical university provides students with more flexible and convenient access to the courses as well as unequal power relations between instructor and students in traditional classrooms where the instructor dominates most of class discussions are instead evenly distributed in online courses. In this accessible and democratic nature of online learning environments, she continues to argue, students can engage in collaborative learning activities more actively than the way they engage in similar face-to-face activities (e.g.,

discussion, debates, group projects, etc.). And, the important educational role of online instructors is not to provide knowledge but to facilitate the process of collaborative knowledge construction among learners.

In her conclusion, she reaffirms that the learning paradigm shift happens as online education matures in higher education and as a result, the traditional learning and teaching processes and outcomes are transformed to the new ones based on the new paradigm of collaborative networked learning:

The convergence of the computer network revolution with profound social and economic changes has led to a transformation of education at all levels. The *new* paradigm of collaborative networked learning is evident in the *new* modes of course delivery being offered, in the educational principles that frame the educational offerings, the *new* attributes that shape both the pedagogies and the environments that support them and that yield *new* educational processes and outcomes. (p. 59)

However, despite her clear and rather normative conclusion, the question of my chapter “is online education really a new learning paradigm in higher education?” remains unanswered. In other words, Harasim’s paper does not provide readers with a full view of online higher education—so, the actual status of current online higher education and the learning paradigm that it is based on are somewhat unclear. Instead, they are derived from the author’s rather limited experiences from her Virtual-U project and a conceptual understanding of online education closely linked to the pedagogical potential that networking technologies are believed to offer. Regardless of the questionable validity of her argument about the paradigmatic changes in higher education, since 2000 in which it was first published, this article has been cited more than 490 times in online education literatures. Through these repeated citations, the argument and statements (see Table 1) in her article have been reinforced and over time, have become taken-for-granted in the field. In this way, this article is a useful illustration of the way dominant discourses evolve and become basic tenets of general understanding, and further, claims are used to justify compatible research directions for other researchers in the area.

For example, Nachmias (2002) cites the above excerpt from Harasim’s conclusion (p. 59) when he proposes a research framework for Web-based instruction that includes a research focus on “shifts and paradigmatic changes in pedagogical practice resulting from the implementation of the new technologies” (p. 215). Daly, Pachler, and Lambert (2004) in their article about teacher learning, also use Harasim’s explanation

about the close relationship between a new learning paradigm and new communication technologies and argue that teachers need to transform their pedagogies along with the current educational changes facilitated by the new learning perspectives and technologies. Papastergiou (2006) similarly states the ICT technologies support the implementation of a social constructivist approach to learning by providing communication and knowledge sharing tools, “enabling the creation of online learning communities for construction of shared knowledge across barriers of space and time” (p. 595) by citing Harasim’s article with several other online education pioneers (e.g., Scardamalia & Bereiter, 1994, 1996; Dede, 1996; Palloff & Pratt, 1999). The author argues that these technologies can transform the traditional educational processes in higher education and further claim that applying constructivist learning approaches in face-to-face instruction is difficult, if not impossible, without using these technologies.

However, there have also been a number of researchers who published research results contradicting Harasim’s argument directly or indirectly (e.g., Njenga & Fourie, 2010; Piezon & Ferree, 2008; Valtonen, Kukkonen, Dillon, & Väisänen, 2009; Zhu, Valcke, & Schellens, 2009). For instance, Zhu and other authors (2009) discussed cultural differences in the perceptions of a social-constructivist learning environment, which suggests not all students are in favor of online interaction as a major learning component of their online course, and Njenga and Fourie (2010) criticize compulsive enthusiasm about online education in the field of higher education, which has been created and reinforced by techno-positivists who put a strong focus on adoption of online education based on their own personal agendas. Nevertheless, Harasim’s work continues to frequently appear as a seminal reference in many online education literatures until recent years (e.g., Cohen & Nachmias, 2010; Nave, Tubin, & Pliskin, 2010; Abedin, Daneshgar, & D’Ambra, 2012; Guasch, Espasa, Alvarez, & Kirschner, 2013; Terras & Ramsay, 2015). In most cases, her argument about online education as a new learning paradigm in higher education is cited as if it is a definite fact without careful consideration of the different models of online courses in her original article as well as her normative voice articulating the new principles of online course design (or new roles of online instructors) and continue to be used as grounds for authors’ research projects.

Table 5.1
A Summary of the Article

Argument [Discourse]	Online education has shifted a fundamental learning paradigm in higher education. This new learning paradigm is more effective than the previous ones of traditional DE and face-to-face education
Statements [Knowledge]	1. Online education is a group communication phenomenon and online communication is fundamentally different from face-to-face communication because of its accessible and democratic nature.
	2. Online education is (and should be) designed based on new principles of collaborative and constructivist learning paradigms.
	3. The online instructor becomes less of a knowledge provider and learners are more active and responsible in collaborative knowledge construction.

5.2. Personal Narratives: Instructional Design Practices in Institution A in 2013

In the previous section, I analyzed the paradigm shift discourse within academic texts in the global context of higher education and now I turn my attention to personal narratives of learning designers about their instructional design practices in the local site. Although the central purpose of this chapter is not to evaluate the truth or falsity of the paradigm shift discourse, it is necessary to analyze the continuities and discontinuities between the global discourses and personal narratives about local practices to better understand the status quo of online higher education. In addition, the ways academic discourse comes in to a disciplinary institution, in which dynamic memberships and many other competing institutional discourses co-exist, and exerts discursive power upon its members may be much more complicated than what is suggested in the academic texts or institutional documents.

Therefore, I will introduce the actual voices of 7 learning designers currently working in Institution A. My analysis of the interview texts particularly focuses on the continuities and discontinuities between designers' statements about online education and ones in Harasim's text. This comparison between the global and local texts is mainly conducted based on two questions (Comber, 1997), which are in each text "what arguments and evidence are used (or not considered)?" and "what behaviours or thoughts are stated as normal (or problematic)?" This section is organized around Harasim's three core statements about online education that I summarized earlier

in Table 5.1 (p. 87) and each will be followed by complementary or conflicting statements appearing in the interview texts.

5.2.1. Statement 1: Online Education is Accessible and Democratic

Harasim (2000) emphasizes the accessible and democratic nature of online communication and based on these potential merits of online group communication different from those in face-to-face settings, she argues that online education is also accessible and democratic. All learning designers that I interviewed similarly recognize the great potential of adopting Internet technologies in distance education for providing more accessible educational opportunities to students and enabling equal relationships among participants in online communication. However, they actually point out that the institutional take-up of online education has been more likely related to administrative perceptions of it as a cost-saving method of educational delivery at the university rather than its potential as a pedagogical tool to increase the educational accessibility or equality in higher education. For instance, Jane, a learning designer who have been working at Institution A since 2001, mentions that in early 2000s “It was all about how this *online learning business* was going to *cut the cost*. So once that started being a part of discourse well... that was it! I will say it’s more *the economics* of it than pedagogy.” As a result, online education has become a main delivery method at the university, however, it has developed in a way as to increase the cost-effectiveness of distance education offerings rather than their pedagogical effectiveness.

Cost-effectiveness is, in fact, one common claim in the literature about why online education is effective. There are considered to be three dimensions of effective online education, cost-effectiveness, interactive learning and flexible access. However, Kanuka and Brooks (2010) argue that all three dimensions cannot be achieved at once. We can see here that Harasim’s approach to online education meets the interactive learning and flexible access dimensions but may not achieve cost-effectiveness, because of the more intensive instructor time required for more extensive interactivity in online courses. Most online courses in Institution A, on the other hand, focus on the cost-effectiveness and flexible access dimensions while giving up the more costly interactive learning component. Thus, online education in Institution A has been developed more into an individualized and flexible educational mode with self-paced courses and any group communication in the self-paced online courses has been

extremely restricted although Internet communication technologies (e.g., email, discussion fora, web-conferences) have been made available. For instance, Angela recalls what happened when a discussion board was first introduced in undergraduate courses a few years ago:

[Students] were starting to trade the answers or whatever on the discussion board. Everyone got so upset about that. “These students were cheating!” I think a lot of those students didn’t realize just because they had finished the assignment one, not everyone else finished. They were used to working in cohorts and then it didn’t occur to them that they might be giving an answer to something... Then we learned, we got burned that way. So we realized “you can use discussions only when you design your assignments in a certain way.” (Angela, October 2, 2013)

In the research field of online higher education, there have also been a number of researchers (e.g., Elloumi, 2004; Oslington, 2004; Rabiee, Nazarian, & Gharibshaeyan, 2013) who are explicitly concerned about improving the institutional profits or market-driven values that online education can bring into higher education institutions. In a relatively recent work, Rabiee et al. (2013) perceive the adoption of online education as a cost-effective method to simultaneously address a number of existing problems in higher education in Iran where educational demand has been rapidly increasing while physical facilities and financial resources for satisfying the growing needs are lacking. Although the authors conducted a comprehensive multi-factor analysis of obstacles to the adoption of Internet technologies, there is little discussion about pedagogical limitations. Power and Gould-Morven (2011) also observes and reports that although administrators generally welcome and support the adoption of online education in their universities, they tend to be unable or unwilling to provide the necessary supports for high-quality online course production and delivery. They conclude that unlike the earlier expectations towards online education to redirect higher education, it has developed into a mainstream educational delivery method without overcoming the similar obstacles encountered by traditional DE.

During my interviews with the designers in Institution A, not surprisingly therefore, no one mentioned that online courses are better than face-to-face ones in terms of the accessible and democratic nature of online group communication, the rationale that Harasim had emphasized. By contrast, there were two *limitations* in online communication that differentiate it from face-to-face communication that were repeatedly discussed by most of the designers. These were first, a physical separation between the online teacher and learner and second,

related to the first limitation, a lack of social presence, which suggests that the perception about DE as the second-class education still persists in the open university. Alex strongly argued that they have to be more conscious about how to structure communications with students in online courses (e.g., well-structured instruction, guidelines, and scaffolds) because “you can’t talk to students online as you do in face-to-face”. Jane talked about a sense of isolation caused by the physical separation from the teacher:

A lack of presence, it’s a big, big challenge. It’s a sense of isolation... Some kind of guidance that you might expect in the face-to-face environment, it would be nice to have it in the online learning... Interaction, for me it’s not just interaction with peers. That is for traditional and online universities have a cohort, but in our environment, [it is more important whether] it’s easy to navigate, the instruction is clear, the material is clear... the expectations, assessment is clear. Arguably it’s the same everywhere, however, especially in the online where students are their own at the beginning... *so, the communication that will become my umbrella term, which is vitally important.* (Jane, September 25, 2013)

Both Alex and Jane stressed the importance of effective communication in online education but they were not necessarily concerned with group communication but rather with issues of information architecture, content presentation, and environment design. Although a few designers talked about the potential of discussion forums or web-conference tools for group communication in their self-paced online courses, the ways the tools would be used in their online courses would be “still very much an effort to kind of replicate the face-to-face learning experiences” (Helen, October 2, 2013). According to the ongoing research efforts to reduce the sense of isolation among individual learners in online courses (e.g., McInnerney & Roberts, 2004; Stodel, Thompson, & MacDonald, 2006), it seems obvious that the critical limitation in earlier generations of DE has not been successfully solved by simply adopting Internet technologies. Moreover, Emerson and MacKay (2011) recently identified the paucity of reliable conclusions emerging from studies comparing student learning outcomes in traditional educational contexts including paper-based DE or face-to-face classrooms with the outcomes in online education. In addition, the results from Emerson et al’s (2011) own comparative study demonstrated that students who participated in paper-based learning performed better than those in online learning.

Moreover, Harasim’s claim about online education being accessible and democratic can be directly challenged through, as I earlier showed, the increasing gap between the ideals of openness and the realities in

many DE contexts (see Chapter 2). I also discussed conflicting issues related to the openness principle at Institution A in Chapter 4. To add two more recent examples from the literature, Fichten and his colleagues (2009) reported a wide range of problems with the accessibility to online education experienced by a large group of students with disabilities and online education professionals and these problems tend to remain unresolved in many online courses. Rye and Stokken (2012) investigate how different factors in students' local context influence their participation in global online education. Their case study suggested that unequal social, material, and cultural dimensions of students' daily life also create unequal learning situations for students participating in online collaboration. These studies further suggest the complexity and difficulty of achieving those educational principles of accessibility and equality that are often unsophisticatedly or uncritically accepted or assumed by many online education researchers including Harasim. Thus, it is important to deepen and reconceptualize these principles by unpacking multiple approaches to them as I have attempting in this thesis (see also, for example, Stewart, 2004; Oztok, 2013).

In sum, unlike Harasim's claim that online education is a many-to-many communication phenomenon, online education has instead been adopted largely based on the cost-effectiveness principle in many higher education institutes including Institution A. The learning paradigm that has guided online education practices tends to still remain the same as the one behind the traditional DE practices.

5.2.2. Statement 2: Online Education is Collaborative

Harasim (2000) asserts online education is (and should be) designed based on new principles of collaboration and the constructivist learning paradigm. However, in my study, 5 learning designers out of 7 specifically stated their approach to online course design was pragmatic or eclectic, which seems to refer to an assumed neutral theoretic place lying between constructivism and behaviourism. Although most of them simultaneously admitted that they do not (or cannot) design courses based on constructivist learning theories, they were very reluctant to describe their design approach as behaviouristic or following traditional scientific instructional design¹¹ models. This

¹¹ Hereafter, instructional design refers to as ID

shows they have quite a negative understanding and attitude towards behaviourist learning theories and traditional ID models.

I am very pragmatic when it comes to design... whether it happens to be in an online environment, whether it happens to be in a face-to-face environment. It's not going to change what you, how you design... it's again *diagnostic*. (Jane, September 25, 2013)

It is kind of *behaviourist* in some ways but I have to say you got *objectives*, you got goals, things that you want to accomplish and I can inject technology, I can inject some really groovy ways of doing thing. But what I've got to do is to balance that with the goals that we want to achieve through the course. (Sue, September 27, 2013)

That's where you do the initial *needs assessment*... Then, I will look at the *objectives*, see if they have really course objectives, unit objectives, see if they are really aligned with assignments. Assignment is really where the learning designer has some influence. (Alex, September 28, 2013)

No matter how they define or articulate their instructional belief and approach, these excerpts suggest that their actual design practices are largely based on prescriptive ID models, which were often negatively viewed because of their tie to behaviourist instructional theories. Nevertheless, at least theoretically, all the learning designers seemed to agree with a constructivist instructional approach although it was not very clear how they understand constructivism beyond designing interactive or collaborative learning activities and assignments (e.g., discussion forums or group projects). The discrepancy between their understanding of idealized design based on constructivism and their actual pragmatic design practices that more closely reflected traditional ID models unavoidably meant that a large part of our conversation about online course design revolved around issues regarding institutional constraints and organizational limitations.

The most frequently mentioned constraints at the course operation level included the self-paced course structure and limited technological functions available on Moodle, the learning management system in use at this institution. At the organizational level, designers seem to feel that their input is minimal situated as they are within a large course team structure including an academic, an editor, and a multimedia designer. The course development process is also very rigid and standardized so it is hard to be creative in either designing learning activities or in making simple revisions to the pre-developed courses, as changes put in place a complex multi-phase approval process involving the other team members. As well, unlike Harasim's positive prediction about the

rapid transformation from traditional DE to constructivist online education in DE institutions, at Institution A changing its old textbook (i.e., print-based course package) publication culture that mainly focused on editing and publishing activities continues to be challenging and slow to evolve. At the university level, fixed administrative policies and bureaucratic processes are also suggested as important factors that disrupt more effective and flexible ID practices. The following passage from the interview with Helen well reflects some of the challenge of switching from DE to online education, which involves the complex relationships between different memberships and institutional culture and working processes:

We had a very complicated set of forms and paper works and faculty really hated it, yet at the same time, they were used to it. It was almost like learned helplessness. They were used to editors really dominating the course design process and then they... weren't taking full responsibility for their course design. They were kind of letting these editors run things and which of course, made *a lot of tension* when we [learning designers] came in, got started getting the LMS in place and telling them that *online courses are very different* from print courses and *your old templates* don't really work anymore. Then we want to be the ones who interact with faculty around the design issues and we just want you to edit... It was pretty difficult to *negotiate* at times. (Helen, October 2, 2013)

What is missing in Harasim's and other online learning researchers' work is a recognition of these institutional constraints and potential resistance to the new method of online course production when it is introduced to older members familiar or preferring the old way to the new one. In fact, before the evolution of online education, there was already a large body of knowledge about ID (i.e., ID theories and models) in DE and the other related fields (e.g., Dick & Carey, 1990; Hannafin, 1992; Jonassen, 1991; Merrill, Li, & Jones, 1990; Reigeluth, 1989; Winn, 1990). For example, in 1980 Andrew and Goodson compared 40 ID models from various instructional settings of education, industry, and military and suggested that instructional designers should carefully choose a model to *follow* when designing their instruction. This study (Andrew & Goodson, 1980) indicates that there were at least 40 models available in the 1970s and 80s. Despite the varying degree of quality in those early ID models, they collectively regarded ID as a scientific problem-solving process and provided prescriptive design procedures such as analysis, design, development, implementation, and evaluation (i.e., ADDIE in Dick & Carey, 1996). Although these models were not exclusively developed in the DE context, they were more frequently targeted at that context, and taken up by instructional designers in DE or similar

instructional settings where teaching and learning activities are not directly connected, rather than being used by individual teachers in regular classroom settings.

In most DE contexts, the instructional designer role was distinguished from the roles of teachers (or instructors, academics, and faculty) who were responsible for what to teach (i.e., content knowledge). Instead, instructional designers were largely considered technical experts with discrete skills and techniques for developing or producing educational materials by following the step-by-step ID procedures (e.g., Andrew & Goodson, 1980):

In using the terms ‘instructional’ and ‘design’, instructional designers seem to indicate that their concern is with teaching, and further, with arranging the instructional aspects of teaching. This is indeed the basis for the instructional designer’s activity. Almost all of the procedures and research undertaken by instructional designers relate to improving what has come to be known as the ‘delivery system’, that is, how to arrange teaching so that teachers’ objectives are achieved most satisfactorily. (Shaw & Taylor, 1984, p. 282)

This simplistic and technical understanding of instructional designers as passive recipients or followers of ID models, however, resulted in little interest in, or discussion about, instructional designers and a consequent lack of shared understanding of this profession in the field of DE (Campbell, Schwier, & Kenny, 2007). Consequently, in many DE institutions including open universities, instructional designers with various titles, responsibilities, positions, and relationships with teaching academics did not have much autonomy or authority in their design practices. Particularly because an industrial production model (Peters, 1967; Garrison, 2000) formed the organizational structure of the most open universities, that was based on industrial production techniques (e.g., division of labour, mechanization, mass production, economies of scale), it was not possible for instructional designers to actively carry out all activities of the ID models in their systematically fragmented organization. This issue is clearly described in the excerpt below:

We instructional designers know we have no power, that our authority rests on our personal and interpersonal skills of persuasion, and that ultimately we can only be responsible for minor considerations like page layout (and maybe not even that if there is a house style), copy editing (and maybe not even that if there are in-house editors), or coordination (and maybe not even that if there is an overall coordinator for the job). (Palmer, 1993, p. 434 cited in Allen, 1996)

However, beginning from the mid-90s (Lebow, 1993), the introduction of constructivism along with a rapid uptake of more advanced instructional technologies (e.g., the Internet) has brought a significant changes in the perception and role of instructional designers in DE. Particularly, new constructivist approaches to ID (e.g., Bonk & Zhang, 2004; Tracey, Hutchinson, Grzebyk, 2014; Visscher-Voerman & Gustafso, 2004; Zualkernan, 2006) have characterized the ID process as more reflective, relational, ecological and artistic rather than scientific, instrumental, mechanical and objective. This new ID perspective has certainly increased the importance of instructional designers as well as increased their broad participation in instructional activities. Other factors too are contributing to the shift towards instructional designers being perceived as change agents, including the growing popularity of online education and urgency of moving traditional DE or face-to-face courses to online in many higher education institutions, in which most of the old members are not very familiar with this new form of instructional practices (Campbell, Schwier, & Kenny, 2007).

For example, Institution A had previously employed a number of instructional media analysts and editors with diverse expertise and backgrounds who played similar roles to those of instructional designers in the production process of independent correspondence study programs, which was mainly based on a textbook publication model. However, in 2007 Institution A hired a group of *learning designers* who could play an important role in moving the institution online by converting all correspondence courses into new online courses. This new group of practitioners all have academic backgrounds in ID and online education and have been acting as a bridge between academics and students, teaching and learning, as well as instructional theories and practices.

Despite the increasing number of instructional designers working in online education contexts and the growing importance of their roles as change agents, we still have little knowledge of their actual experiences and perceptions of online instructional design (e.g., who they are, what they do, where and how they work, who they work with, etc.). With a few exceptions (e.g., Kenny, Zhang, Schwier, Campbell, 2005) current literature has also exclusively focused on the discrete skills and activities of ID in a similar way to the earlier characterization in the literature.

Compared to the heavy responsibility that learning designers carry into DE institutions, which is to transform the long-standing traditional and behavioristic ways of designing and developing DE courses to the new ways using new instructional technologies based on a constructivist learning paradigm, the weight of existing research effort to understand their working contexts and support their practices seems too minimal. In parallel with the lack of contextual and organic understanding of actual ID practices, the normative and authoritative voices about how to design online courses that are mostly based on an experimental paradigm of educational research have largely been responsible for the gap between the constructivist learning theories and practices in open universities. In particular, it is evident in online education literatures that most of the empirical studies, which support constructivist learning theories and show positive and successful results from collaborative online learning practices have been conducted in traditional research universities or graduate-level courses in DE institutions (e.g., online MBA program in Kim, Liu, & Bonk, 2005; online graduate program in Goertzen, 2007; online module in MSc in Information Technologies and Managements in Gilbert, Morton, & Rowley, 2007). The unique pedagogical context of Institution A related to the characteristics of its instructors, subject matter and students will be further discussed in the next section.

5.2.3. Statement 3: Online Instructor is a Facilitator

Harasim (2000) argues that online instructors function less as knowledge providers and learners become more active and responsible in collaborative knowledge construction. Since the beginning of online education as an academic discipline, Harasim (1990; 2000; 2012) and many other researchers (e.g., Clark, 2001; Saver, 2005; Sun, Cheng, Lin, & Wang, 2008) in the field have advocated this new dynamic between instructor and students. All learning designers that I interviewed at Institution A seem to share and accept Harasim's view on effective online instructors as representing normative or legitimate knowledge. That is, learning designers want instructors to be learning facilitators who are enthusiastic about designing and facilitating group activities in their online courses. For example, Jane says:

Some faculty have tried to translate the faculty lecturing in a face-to-face environment to the online. We need to try to move away from just thinking of the lecturing mode in the online world otherwise we are not using online learning technology to its maximum potentials... using the tools

[discussion boards] is to give up-to-date information, so really seeing this [the LMS system] as a static not dynamic platform. (Jane, September 25, 2013).

Similar to Jane, other learning designers also problematized and criticized instructors who perceive their role as one of providing knowledge to students in the same way as lecturers in traditional face-to-face classrooms and who resist providing students with group activities in their online courses. Based on the belief that online instructors are not (and should not be) knowledge providers but facilitators of students' collaborative learning, the designers have made continuing efforts to change faculty members' perceptions and teaching approach to online courses. However, their efforts have not been very fruitful considering that most of the undergraduate-level online courses are still designed based on the knowledge transmission model. Thus overall, the potential of Internet technologies for enabling group communication in DE as described in the online learning literature has not been fully realized in those courses in Institution A.

Before discussing the gap between the theoretical expectations or norms for online instructors and the actual teaching attitudes or behaviours of instructors in Institution A, it is important to understand the unique way the pedagogical role of instructors is positioned in many open universities that differs from that found in most campus-based universities. In the interview texts, at least five different terms are used to refer to instructors, these being; faculty, professors, academics, subject matter experts, and tutors, and these terms were interchangeably used by designers. In Institution A, faculty members or professors, who are more frequently called academics, are not always teaching the courses they design. In many cases, they serve in the role of subject matter experts who provide knowledge (i.e., course content) and the university hires contract-based tutors with a certain level of expertise in the course content and it is these contract tutors who teach the courses. Thus within the traditional textbook publication model of course production, faculty members can be regarded as authors who write their lectures in Microsoft Word documents, which will be later published as a study guide as important, but single element of a large course team including publishers, editors, visual designers, and media technicians.

When the course is offered, sometimes the faculty member who wrote the study guide does become the course tutor, whether this happens or not depends on the number of course enrolments. However, in most cases,

due to the continuous enrolment system at the university, over time the student numbers in courses tend to increase to such a level that extra tutors are needed to support a student block assigned to them which is usually around 30 students per tutor. In addition, once the self-paced course is open, it runs continuously without any breaks for several years (approximately three to five years). At the same time, the faculty have other professional commitments including serving on academic and administrative committees, conducting research and writing new courses or revising previous courses. So, often, someone other than the course author teaches their courses. Within this pedagogical model, which is structured through the division of labor process, the role of instructors is carried out by at least two or three different parties including academics who provide or write course content; designers who select or create learning activities; and tutors who manage courses and interact with students.

Another important concern arising within this particular pedagogical context where a single course is often taught by many different tutors, is to standardize the teaching (or tutoring) process and its quality so that all students in the course can receive the same pedagogical services and experience. As a result, the teaching rules and processes have become very standardized and rigid including specific evaluation criteria for course assignments and exams, and general communication rules with students (e.g., responding to students' questions within 2 business days; using communication tools available on Moodle). This may also contribute to the difficulty of designing constructivist online courses in this institution and making individual tutors more active and flexible in their teaching process. As I discussed in the previous section however, most online education literature including Harasim's (2000) article does not reflect this fundamental contextual differences between DE institutes and conventional face-to-face universities. Thus, Harasim's statement about the new roles of instructors, which is mainly supported by her own research conducted in a traditional university setting, does not reflect the daily reality of many open universities.

The interview transcripts with designers also include similarly conflicting claims about the characteristics and educational needs of online learners from those in Harasim's article. In short, designers perceive that most students in Institution A tend to prefer individual learning to collaborative learning:

[Students] just want to go through their course and not necessarily have any interactions whereas some pedagogical principles now are all about constructivism, social learning, peer-to-peer exchange. So there is a big push for that and yet the reality is we do have a large segment of student populations who are resisting to it. They don't really want to have this, probably they have it somewhere else in their lives, so they just want to get through and they just want to be an "alone learner". (Jane, September 25, 2013)

Those ideals of the independence and interaction which, it seems we can't get together, we either do one or the other... that's why I think the self-paced study with interaction could be difficult [because] it has got elements of both... lots of times, students come in and "just give me the stuff and leave me alone." (Jane, September 25, 2013)

Jane continues, "They still want the personal attachment and personal guidance sort of like all the good elements of a traditional distance education university. They still want to have that kind of one-on-one touch with their tutor." That is, students want one-on-one interaction with their instructors (tutors in this context) rather than many-to-many communication in their self-paced online courses, which are expected to be more flexible than being interactive or collaborative.

One thing about meaningful learning experience that hasn't changed whether it's online or face-to-face is that students still need contact with teacher or tutor, or instructor. That will never change... We are not being really realistic if we think we can automate that. Most students I hear from don't need so much interaction with their tutor but it has to be there. (Alex, September 28, 2013)

In fact, an increasing number of online education researchers have suggested similar research findings, which conflict with what many constructivist online learning advocates have argued. For example, Asunka (2008) found that undergraduate students enrolled in a collaborative online course did not respond favorably to collaborative learning activities (e.g., asynchronous discussions, project-based learning activities) and they tended to perceive these activities as more demanding and time-consuming than individual learning activities. Paechter and Maier (2010) also argue, based on their large-scale survey results with a sample of 2196 students from 29 universities, that students expect online courses to provide a clear and coherent structure of knowledge that supports their self-regulated and flexible learning while they prefer face-to-face courses for collaborative and interactive learning. Findings in other studies (e.g., Cole, Shelley, & Swartz, 2014; Kuo, Walker, Belland, & Schroder, 2013) also indicate interaction among students does not always contribute to student satisfaction while

convenience and other kinds of interactions (i.e., learner-instructor interaction, learner-content interaction) have more impact on students' perception of the effectiveness of their online courses.

Although the particular understanding of online instructors as facilitators has been accepted by the learning designers as legitimate normative knowledge about online teaching, the actual student needs and preference for individual learning and one-on-one interaction with tutor provide conflicting ideas about what constitutes effective online learning. Also, because the designers are exclusively engaged in the course design phase, they are mostly concerned about how to support faculty members in designing their courses using more constructivist strategies while not focussing on (or being less interested in changing) the way that tutors actually interact with students in the courses. This situation makes constructivist ID practices more complex and challenging tasks for the designers and results in a somewhat limited and mechanical approach to online course design in Institution A. For instance, Sue has attempted to insert group discussion in all courses, however, ironically she believes that discussion cannot be a central learning activity and knowledge needs to be provided by reliable sources such as instructors or textbooks. As illustrated by her explanation of limitations in Massive Open Online Courses (MOOCs), she tends to think that information from peers is often not reliable, thus treating discussion as a mandatory but peripheral, add-on learning activity:

There is no teacher interaction, it's all peers then how are they... you can learn a lot from your peers the trouble is that we are not always equipped. If i am taking a MOOC in the area where I don't know much about. Mechanics. I don't know how to fix a car, so I am just listening to my peers... No, I need a teacher to confirm that. Yes, that's a good idea or not. So there are needs to be some way for students kind of verify what's going on. (Sue, September 27)

In conclusion, a simple answer to the question "Is online education really a new learning paradigm in higher education?" appears to be "No", at least in the open university context. The paradigm shift discourse has strongly influenced the field of online education and its scholarship, particularly both the perceptions and practices of researchers who then have produced a set of legitimate knowledge, statements, and norms based on this discourse. The open university also appears to have taken on the broader societal and academic perceptions about instructional designers and the increased importance of their roles. Instructional designers in this view have been recognized as an important part of the new knowledge apparatus in the online education regime and played an

important role in moving the university online. However, their practices inside universities have not been regulated by the norms of academia but rather by other sorts of conditions (e.g., the industrial production model from the previous DE regime, the cost-effectiveness principle, and relationships with other members).

As a result, there are multiple contradictions observed in the learner designers' narratives. For example, although learning designers value the constructivist instructional approach far more than the behaviourist or traditional ID models, their practices are mainly based on the traditional models. They believe constructivist ID is more effective, however, in reality they *follow* a traditional (behaviourist at times) design approach which is more applicable in their context. Effectively, they *design* courses in traditional ways focusing on setting clear learning objectives and structuring course knowledge. This situation may be seen by learning designers and ID researchers as a theory-practice gap in open universities. Or, using a Foucauldian lens, it can be interpreted as a situation where the paradigm shift discourse is dominant in the academic field, but not in Institution A.

However, finding which discourse is dominant and governing peoples' perceptions and practices seems a more complicated and difficult task here than the situations Foucault logically shows in his own works. In the previous chapter, indeed, we already examined two dominant discourses (i.e., openness and innovation) in Institution A and learned that the meanings of each discourse and the relationships between the two have changed over the history of the university. Further, the paradigm shift discourse seems to have assisted the shift in meanings from the old DE ones to the new online education ones as well as facilitated the institutional transformation from a traditional DE university to online university. However, as we also discussed in Chapter 4, there are multiple competing discourses related to the two principles that co-exist in the historical site of Institution A and it is difficult to increase both openness and innovation in a single online program. That is, the gap between legitimate instructional theories and actual ID practices may be the *evidence* for, as well as the *outcome* of, the disjunction between rhetorical discourses (i.e., online education increases both accessibility and the quality of post-secondary instruction) and the reality and constraints of a particular educational online education context. In the following section, I will analyze how and under which conditions the paradigm shift discourse has emerged

and developed in the field of higher education to understand its relationship with other discourse in the broader social context.

5.3. The Four Conditions

My analysis of Harasim's text suggests there are four major conditions under which the paradigm shift discourse has emerged and become dominant in the emerging field of online education during the 2000s. The four conditions are closely connected to other important and related social and educational discourses and are; network technologies, constructivism, neoliberalism and the role of empirical research.

5.3.1. Network technologies

The development of network technologies is one of the critical conditions in which the discourse of online education as a new learning paradigm has emerged. Throughout Harasim's article, for example, there are over ten places where she directly mentions network technologies (e.g., computer conferencing or communication technologies) in relation to the beginning, development and innovation of online education. Harasim (2010) also starts her introduction with the invention of the WWW:

The invention of the World Wide Web in 1992 made online education increasingly accessible and allowed new pedagogical models to emerge. Because the Web is easy to use and capable of presenting multimedia, it expanded the range of disciplines that could be offered online. The 1980s and 1990s saw enormous innovation and expansion in online education and networking at all levels of education. (p. 42)

There are three different philosophical positions reflected in the literature of the field towards the relationship between human, society, and technology, which include: Technological Instrumentalism, Technological Determinism, and Technological Constructivism (Scharff & Dusek, 2003). Understanding these different approaches to technology can inform this discussion about the role of network technologies in the emergence of online education discourse. Harasim's, like many online education scholars', argument is inevitably guided by her underlying philosophy of technology although she holds somewhat mixed perspectives.

Technological Instrumentalism: The history of technological instrumentalism is based on the Hegelian positivist tradition that has influenced current distinctions between "natural science" as scientific knowledge and

“applied science” as technological application of that knowledge. Within this ends-means relationship, the role of technology is considered a neutral instrument for achieving a utopian future: “Technology is widely depicted as an unproblematically beneficial force for human progress... technology needs only the proper association with modern science to fulfill its promise” (Scharff & Dusek, 2003, p. 3). Afterward Kant empowered human beings as “rational animals” and Comte suggested that successful science makes social and political reform possible. This modern understanding of human beings who have control over nature has further developed social sciences, which search for the laws and rules operating society in ways parallel to empirical investigations of the physical world (Dusek, 2006, p. 38). That is, technological instrumentalism views scientific knowledge as a major driving force for social progress, at the same time, perceives technology as a neutral instrument for facilitating that progress.

Technological Determinism: “Determinism” generally refers to the idea that all social and cultural events are regulated through particular forms of previous forces (Scharff & Dusek, 2003). Although there are various forms of determinism such as genetic determinism, economic determinism or structural determinism, the overall argument of determinists is that human action is not free but determined. In this sense, determinism is frequently connected to the understanding of human beings as passive “tool-users” rather than active “tool-makers” (Mumford, 1967). Technological determinists do not accept the conception of human nature as a rational animal but presuppose autonomous technology as being a more powerful force influencing social events than the influence of the human reasoning. For example, Jacques Ellul (1980) argues that because of the overestimation of human abilities to control nature, technological development is often misunderstood as being driven by human desire. However, neither a scientist with insufficient scientific knowledge nor a politician depending on a limited ideological belief can change the direction of technological development. Rather, the technological system itself as a creative force leading technological progress can in fact change human conditions.

Winner (1986), drawing upon concrete examples such as a public park design project in New York that causes the segregation between socio-economic groups, explains how technologies create political consequences in both intended and unintended ways. Technological systems bring inherent political properties with them that change the conditions of human lives even though the changes are not planned or even expected by the human

beings who create and operate them. Marx and Smith (1994) suggest two different levels of technological determinism called “hard” and “soft” determinism. Both basically believe that technological development has shaped our society and history. However, ‘hard’ technological determinists tend to ignore human agency and attribute all social changes to technology itself, where the soft side of determinism opens more space for human action or will. The soft determinists (e.g., Heilbroner, 1967; Marcuse, 1964; McLuhan, 1969) also consider complex social, economic, political and cultural structures important driving forces for the advance of technology.

Technological Constructivism: Constructivists do not consider technology as a determining factor in human lives (Bijker, Hughes, & Pinch, 1987). In response to technological determinism, technological constructivists argue that the ways a certain technology is used can be only understood in relation to the social context in which the technology is embedded. Researchers holding this stance are interested in understanding the social contexts where a certain technology is accepted or rejected as well as how a particular form of technological practice is defined as a success or failure. It is important to note that technological constructivism is fundamentally different from both determinism and instrumentalism in terms of its view about the history of technology. Feenberg (1992) takes a constructivist *and* hermeneutic approach to the relationship between technology and modern society that conflicts with both instrumentalist and deterministic views. He provides several examples to show that a technological change does not necessarily constitute a move towards more innovative or efficient functions; rather it tends to respond to the different demands of social actors and is directed by their choices. That is, in Feenberg’s perspective, the technological development is not linear but rather may spread in a myriad of directions in relation to different social conditions.

Furthermore, Feenberg (1992) argues against the instrumentalist belief that technology is just a neutral and efficient tool that can be used by human beings with good will and reason for the purpose of social progress. He warns that such a naive (and uncritical) position may deepen the technological “hegemony,” which refers to “a form of domination so deeply rooted in social life that it seems natural to those it dominates” (p. 309). Instead, technological implementation and innovation should be understood based on both explicit and implicit cultural and political agendas that are inherent in the design (often supporting a dominant group’s demands so reproducing

an unequal social structure). In line with the sociologist Bourdieu (2000), therefore, constructivists argue that in order to accurately understand the relationship between technology and society we should examine the “social meanings” not “functionalist goals” of technical objects. We should draw a broader picture of the context in which the technical object is located (i.e., the social structures and conditions in which particular experiences are gained) and explore how the object changes human activities (and vice versa) of different socio-political groups.

Linking back to the online literature and Harasim’s article, on the surface, she appears to take a constructivist attitude towards technologies as she explicitly cites Feenberg’s works:

The importance of design... is the recognition that technologies are not just useful for this or that purpose; they construct our worlds (Feenberg, 1999). Virtual space is profoundly social space. “We shape our buildings, and afterward our buildings shape our lives,” as Churchill observed in 1960. (p.52)

However, once I analyzed her statement more closely along with her other statements about technologies, it became clear that her constructivist-like perspective is limited to acknowledging both human and technologies as collaborative driving forces behind social and technological development. That is, although she escapes from both radical instrumentalism and determinism, she still maintains a progressive perspective about technological innovation and social development.

As all the designers, implementers, and practitioners whose achievements have created the [learning] framework we are now using would attest, in the process of shaping virtual space into social and learning space, a lot of shift happened! (p. 42)

In the 1970s, e-mail made possible more generalized educational adoption of computer networking... indeed they originated an entirely new approach in online education: the networked classroom, in which teachers and learners launched joint writing and research projects. (p. 44)

As access to computers and networks continued to grow, educators recognized that cyberspace could be shaped for a wide range of uses. They also realized that online education was a separate field and began to explore how they could enable students to socialize in this new space. Their activities led to path breaking new approaches for networked collaboration... (p. 45)

Particularly, her assumption about the ability of online education to increase educational access and democratic learning culture (in the excerpt below) reveals a lack of recognition of the complexity and tenacity of unequal socio-political structures in which each student’s life is embedded.

[W]e could reinvent many aspects of education by using the potential access networking provides... place-based institutions also presented physical barriers to learners with disabilities. These barriers began to fall swiftly as network access grew, and by the 1990s, rural areas and many Third World regions began to participate... Temporal access was another evident feature... Not only does it enable access to learners with family or employment commitments, the 24/7 access expanded air time for discussion and reflection, allowing everyone to have a voice, overcoming challenges, and traditional discrimination factors, such as ageism, sexism, and racism. (p. 54)

5.3.2. Constructivism and Constructivist Learning

The growing acceptance of constructivism across the field of education appears as another major condition that enabled the paradigm shift discourse to emerge and proliferate in the field of online education. Harasim's only statement about constructivism in her article is: "Constructivism as it has come to be known mainly through the works of Jean Piaget asserts that knowledge acquired by a process of mental construction. Constructivism has become a synonym for 'learning by doing' (Bereiter, in press¹²)" (p. 54). Considering that she suggests constructivism as one of the three principles that guide or should guide online education practices, it seems like an insufficient explanation. Nevertheless, she consistently promotes the constructivist view of learning as the essence of online education throughout her paper by openly describing online education as collaborative (or interactive). Also, she repeatedly underlines the distinctions between online education, which enables group communication, and distance education, which is lacking in many-to-many interactivity. She then puts a higher value on online education for being constructivist.

Indeed, it is common for most online education articles not to provide a thick description of constructivism but to briefly mention a few constructivist learning principles as the theoretical foundation of their design or research. The mounting acceptance of constructivism as the new and correct philosophical foundation for education may, as familiarity with the term increases, become regarded by both authors and readers as too obvious to explain in depth.

¹² No information about this source appears in the article. However, using one sentence that Harasim directly quoted from the source, which is "Knowledge work is work that creates or adds value to conceptual artifacts (Bereiter, in press)" it was searched. An APA citation of the source is: Bereiter, C. (2002). *Education and Mind in the Knowledge Age*. Mahwah, NJ: Lawrence Erlbaum Associates.

However, it appears that constructivism is often arbitrarily used or superficially presented in many online learning articles including Harasim's. In other fields such as philosophy of science, there have been intense debates about constructivism among a broad range of constructivist groups holding diverse positions and concerns about the origins of human knowledge and social relations (Phillips, 1995). However, considerations about such complexity that might produce conflicting educational implications have rarely been discussed in the field of education generally but instead, it has been enthusiastically taken up by educational researchers and become "something akin to a secular religion" (p. 5).

Particularly in the field of online education, constructivism has been simplified and treated as just one of a number of learning theories regardless of its original epistemological evolution. Indeed, a neat connection between online learning and constructivist learning (e.g., a simple equation such as "online learning = interactive learning = constructivist learning") has been in place since the early years of its development. Seeing online education as an effective means for realizing the application of constructivist theories in education allied with the capacity of computer technology has encouraged this limited understanding (e.g., Kanuka & Anderson, 1998).

Even articles that exclusively discuss constructivism have not avoided this issue of oversimplifying its essence as well. For example, one of the most common approaches to grasping the philosophical or epistemological ideas of constructivism is by comparing "constructivism versus objectivism". Vrasidas (2000) chooses this strategy to make his argument:

I will focus on the extreme ends of the continuum in order to illustrate their differences. After reviewing the two ends of the continuum I will discuss how an objectivist distance educator structures a course to promote interaction and learning. Then, I will discuss how a constructivist structures a similar distance education course. (p.2) [emphasis added]

I would claim, however, that his thesis contains at least three fallacies: First, the comparison between the two epistemological stances is inaccurate because it compares a radical form of objectivism with a moderate version of constructivism. First claiming that, "An objectivist educator believes that there is one true and *correct* reality, which we can come to know following the objective methods of science" (p.3) produces a position that would be seen as problematic according to common-sense knowledge in our culturally diverse society. He also

briefly introduces the radical constructivist position of Von Glasersfeld (1989) as, “He argued that knowledge never represents the real world and any knowledge that is constructed does not correspond to the external reality” (p.7), which may, for different reasons, also sound irrational or too vague to many readers. However, he then escapes this radical idea without much struggle by quickly moving to a less extreme version of constructivism which has more common-sense appeal (Cobb, 1994): “For the purpose of this paper, the author will follow Cobb’s theoretical ideas, according to which knowledge is constructed through social interaction and in the learner’s mind.” (p.7). Unlike the radical constructivist claim made earlier, this less extreme statement would hardly evoke the same doubts.

Second, the depth of epistemological level of ideas on which the two paradigms are based is lost in his comparison between the two in terms of their pedagogical implications. Instead, he reduced his focus to the comparison between a behaviourist approach and a constructivist approach to instructional design, which seems somewhat simplistic. In his article, objectivism in education is simply represented as behaviourist learning theories and linear “input-process-output” instructional design models informed by Tyler’s (1949) mechanisms of scientific management (p. 4). These educational approaches have been already criticised for decades as oppressive, and coercive methods when Vrasidas wrote the article, and this had inevitably led to a somewhat negative attitude to the objectivist position in the literature. The constructivist approach, on the other hand, is depicted very positively as a learner-controlled, situated, interactive and collaborative learning environment enhanced by flexible instructional design. A few seminal constructivist learning models and instructional design approaches (or considerations) are introduced in similarly positive ways. He also included several renowned constructivist-educators’ (e.g., Piaget, 1970; Vygotsky, 1978) voices as authoritative claims without analyzing them in depth.

Learner Control: In a constructivist course, the learner has a lot of control over her own learning and is given the opportunity to negotiate content, assignments, procedures, and deadlines... The role of the teacher in constructivist settings changes from authority figure to that of a coach and partner in learning. (p. 9)

Cognitive Apprenticeship: [T]he goal of constructivist educators is to guide students to think and act like experts (Bednar, Cunningham, Duffy, & Perry, 1992; Brown et al., 1989; Resnick, 1987). What do experts in their domains do in their everyday work? (p. 8). The constructivist teacher

structures the learning environment so that she will have the opportunity to model expert behavior to students in the related subject. Therefore, it is important that the teacher or instructional designer is a content expert as well. (p.10)

Collaboration: A major goal of a constructivist approach is to promote the construction of multiple perspectives in various domains. One way of achieving this is by using cooperative learning strategies where learners work with peers, discuss different viewpoints, and negotiate positions. (p. 10)... the emphasis in constructivist learning environments is not on identifying specific knowledge, but to identify tools necessary that learners will need to construct knowledge. (p.11)

Third, he seems not to reflect the diversity of constructivist authors (or just perceives it as unnecessary) in terms of the philosophical and political concerns that motivate them to participate in the epistemological debate. For example, he puts Kuhn (1970) in line with other constructivists such as Piaget (1970) and Vygotsky (1978) and summarizes all of their thoughts with a simple statement of “knowledge is constructed” (p. 7). However, unlike Piaget or Vygotsky who are focused on a psychological understanding of human development and socialization, Kuhn (1970) is concerned with the development of science as a discipline (normal science or scientific dogmas). Kuhn observes why and how the ways of doing science research are largely dependent on the particular scientific paradigm in which a certain group of scientists are engaged at a given period. Kuhn’s main political position is that there is no single ultimately right scientific method, but rather multiple paradigms in the field of science that produce different sets of rules and methods for searching knowledge and conducting research. When a dominant paradigm is replaced by another paradigm, different legitimate theories and methods emerge.

Thus Kuhnian constructivism cannot be easily integrated into the discussion about pedagogical strategies in classroom settings. It may, at best, suggest that the ways behaviourist online educators design and teach their courses are incommensurable with those of constructivist online educators because the two paradigms are not reconcilable. This may ultimately invalidate Vrasidas’ pragmatic position: “When as a teacher I situate myself on the continuum, I avoid the two extreme ends. I believe that there are times that a more objectivist approach is appropriate and there are other times that a more constructivist is appropriate” (p. 14). It can also be questioned whether we can be truly constructivist if we simply believe that all learners will inevitably benefit more from online courses that emphasize group discussion rather than from traditional DE which allows them to learn

independently through reading a textbook; especially when we do not know the learning or living contexts from which individual learners come. Similarly, in line with the first condition above, would it be possible for a true constructivist to insist that online communication is democratic without considering individual participants' characteristics such as their educational levels, linguistic competences, and socio-economic backgrounds?

5.3.3. Neoliberalism and Empirical Research

The last two conditions that enabled the paradigm shift discourse to emerge in the field are the growth of neoliberal ideas in higher education and a focus on empirical research in distance education. The influences of these two factors may be less evident than the first and the second conditions in Harasim's article specifically. However, it may be helpful to reflect upon the roles of these factors in the development of online education broadly. First, I will provide a brief overview of neoliberalism and its influence on online education.

Neoliberalism, or neoliberal capitalism, has been extensively discussed in critical social theoretical camps including those in education as a way to understand current market-driven social phenomenon (Barnett, 2000; Barry, Osborne, & Rose, 1996; Giroux, 2004; Harvey, 2005; Hoogvelt, 2001). Even though there have been different interpretive definitions of the term 'neoliberalism,' most scholars agree that it does not refer to a simple form of political affiliations or economic policies but rather to a complex logic of governance having significant influences on political, economic, social and even personal decisions (Aronowitz, 2003; Larner, 2000).

One of the most fundamental neoliberal ideas in education, particularly in many developed and capitalized societies, is that public educational services are inefficient and therefore that individual students should be free from government control over their educational choices (Marginson & Considine, 2000; OECD, 1996). Neoliberal educators also believe that global competition in a free market is imperative so individuals as being free "human capital" are responsible for strengthening their own competitiveness in the market. Within higher education institutions, neoliberal discourses have been the means whereby the market-driven and performance-focused management mechanisms have been created (Apple, 2005; Stromquist, 2002; Torress & Rhoads, 2006).

Among many who analyze the relations between neoliberalism and education, Spring (2008) provides a comprehensive description of the relation among several related neoliberal discourses such as “information technology,” “the knowledge economy” and “lifelong education” along with globalization. The brief scenario based on his explanation can be such that information technology has increased access to knowledge, which is deemed as a critical factor for economic development (Monahan, 2005; Stromquist, 2002; World Bank, 2003). Rapid technological innovation has further changed the nature of learning so that anyone can learn anywhere and anytime, which has in turn created the conditions for engaging in lifelong learning. As such, lifelong learning has now become seen as an absolute necessity, essential for all individuals to improve their skills and knowledge in order to maintain their value as human capital in the competitive global market throughout their working lives (Borg & Mayo, 2005).

These neoliberal discourses have also influenced the roles of teachers and students in higher education institutions. For example, professors’ scholarly autonomy has decreased while their accountability as a knowledge worker has increased as academic institutions increasingly adopt corporate human management techniques. Students are seen as having autonomy and freedom as customers (i.e., clients or active learners) and as being responsible for their educational choices, processes and outcomes (Olssen & Peters, 2005). In Harasim’s (2000) article, the neoliberal ideas are similarly included as part of the rationale for the development of online learning as the following statement implies:

The telecommunications and knowledge revolution enabled greater and faster human communication and collaboration and led to fundamentally new forms of economic activity that produced the knowledge economy and required basic changes in education. (p. 42)

Harasim’s other statements such as “Lifelong education must enshrine the principle of access so people may be linked together.” (p.53) or “... a participant as the students assume more responsibility for generating input” (p. 58) hint of underlying neoliberal assumptions about the necessity of online education and learners’ responsibility for their educational progress.

Her conceptual arguments about online education as something new, interactive, collaborative and effective, which has led to the paradigm shift in learning is supported by her large set of empirical data (i.e., detailed analysis of 100 Virtual-U courses). Her analysis of the empirical data set produced several evidence-based findings about the courses, which are generally regarded as somewhat reliable or valid if not viewed fully as truth or facts: a) “100% incorporated some form of collaborative learning activity as a significant portion of the courses,” b) “over 50 courses demonstrate a pattern of highly active students regularly reading and contributing to the online courses,” and c) “the distribution of communication in the online course activities is fairly evenly spread. Most students are participating most of the time, unlike traditional classroom situations in which the instructor dominates the airtime.” (p. 55-56).

If we consider that the Virtual-U research project was one of the first large-scale online education field trials (p. 43), however, it may be wrong to take what happened in those 100 trial courses as representing the state-of-the actual of all online education at that time (Selwyn, 2008). Nevertheless, the large data set plays an important role in supporting her theoretical argument and creating knowledge about new educational roles and entities. An increasing number of published articles including similar empirically-based findings in peer-reviewed academic journals has further facilitated the production of legitimate knowledge about online education. Along with other conditions discussed above, these early research attempts that generated empirical data, new knowledge, and models have strongly facilitated the emergence and development of the paradigm shift discourse.

5.4. Conclusion and Discussion

Before summarizing my findings and concluding this chapter, it is worth mentioning again that the purpose of my discourse analysis project is neither to provide a complete explanation or unquestionable evidence of what is happening in the current online higher education context—I do not believe that anyone can achieve that goal if they even try—nor to simply determine what/who is right and what/who is wrong. In this sense, I am fully aware that there are many other things (i.e., discursive conditions and statements) that I did not discuss here. Nevertheless, what I intended to provide in this chapter was a credible explanation about how this particular discourse about online education, which is rather rhetorical than actual, has emerged and become dominant and

further influenced actual DE practices. I only hope that this analysis can expand our understanding of online education beyond the current rhetoric and some of my findings can raise further questions and critical discussions in the field of online education.

The particular discourse that I focused on was that online education has shifted a fundamental learning paradigm in higher education. This new learning paradigm is more effective than the previous ones of traditional DE and face-to-face education. Based on this discourse (or to support this discourse), a set of statements about online education has been produced including a) online education is an accessible and democratic group communication phenomenon, b) online learning is collaborative and interactive, and c) online instructor becomes less of a knowledge provider and learners are more active and responsible in knowledge construction. These statements have become legitimate knowledge or norms in the field, which suggests the rhetoric of online education has been a *doctrine* of online education.

My analysis suggests that there are, at least, four conditions (i.e., technological, educational, social, academic factors) that have collaboratively enabled this paradigm shift in discourse and knowledge to emerge and develop. Firstly, the development of Internet technologies and their potential for more accessible and democratic group communication certainly created the basic technological conditions for the birth of online education. However, more importantly, our progressive view about the relationships between technological development and social or educational innovations seems to be a more critical condition. I will argue such a view is based on our mixed philosophical stance towards technologies (i.e., technological determinism and instrumentalism), which has been pervasive in the field of DE where technologies have been playing a significant role in mediating teaching and learning activities.

Secondly, the growing acceptance of constructivism and constructivist learning theories which emphasize learners' collaborative knowledge construction in general education contexts also made it possible for these discourse to emerge. However, the way that many educators understand constructivism has been quite limited to its practical application as an instructional theory. Thus the deep discontinuities that arise from its philosophical

and epistemological origins are not typically acknowledged. We also have failed to fully grasp the political concerns that many original constructivists have raised. This practical (but too simplistic) application of constructivism and its design principles in online learning—often set opposite to radical objectivist and behaviourist learning theories, which have been commonly criticized in current educational contexts—has resulted in the development of constructivist online teaching and course design as legitimate norms.

In addition, the growth of neoliberal ideas in higher education as well as an empirical research tradition in the DE field were the two other social and academic conditions in which the discourse emerged. These factors further contributed to and facilitated the rapid circulation of the set of knowledge and norms produced by the discourse. Having considered the growing criticisms about neoliberalism and empiricism in general education contexts, we also need to critically examine some of our taken-for-granted assumptions about popular concepts in current society such as information technology, the knowledge economy and lifelong education. Also, we need to be more conscious about how these neoliberal concepts about learner, teacher, university, society and the relationships between them have moved into the field of online education and changed our perceptions and attitudes towards them. This may enable us to more accurately conceptualize online education.

My interviews with learning designers engaged in both academic discourse and actual online education practices in the DE institution also suggest the rhetorical nature of the discourse and the discrepancies between the discourse and reality (or theories and practices as a result). Although learning designers tend to accept the theories in the academic field of online education (i.e., legitimate knowledge and norms based on the paradigm shift discourse), these discrepancies produce conflicting voices over their beliefs and practices in their interview texts. Furthermore, there are multiple other conditions and factors in their specific institutional context where complex relations among different members exist that also influence learning designers' thoughts and practices. These discontinuities repeatedly appeared and the multiple conflicts and tensions among the university members implied in the interview texts clearly demonstrate that the paradigm shift discourse is certainly exerting its discursive power in particular ways. However, at the same time, it also suggests that there are other competing discourses that disrupt and resist the power circulation. Therefore, now, I will turn my attention to analyzing this power effect

of the dominant discourse upon people's thoughts and behaviours and the power relationships among different groups of people at Institution A in the following two chapters.

CHAPTER 6

POWER

Subjectification of Instructors: Who are the Effective Online Teachers?

This chapter examines the power of discourse and knowledge, particularly the effects of the dominant discourses on instructors' subjectivities and positions within an open university. As described in the previous chapters, the two dominant discourses in Institution A in regards to its institutional mission and principles, openness and innovation, have changed over the last two decades. Complex relationships between the two principles have also emerged and changed along with other social, political, and economic changes. Although both openness and innovation have remained as dominant discourses since their emergence in Institution A, there are significant discontinuities in the institutional approaches to the two principles within the DE regime compared to the online education regime. For example, whereas the old DE discourses were largely concerned with non-traditional students underserved by conventional residential universities, the new discourses are aimed at the general public, particularly those looking for more convenient and flexible learning opportunities. In terms of innovation, in the previous DE context, Institution A had an exclusive focus on teaching activities and innovation was perceived as a supportive mechanism to improve their pedagogical quality. However, in the current online education context, the open university appears to place greater value and emphasis on research-oriented innovation and technologically-driven pedagogical innovation that can lead to more immediate profits rather than long-term benefits like improving teaching capacity (detailed in Chapter 4).

In the academic field of online higher education, an emerging discourse about online education as a new learning paradigm has produced a new set of knowledge, statements and norms about effective online instructional practices. This discourse is very relevant to our current understanding of online education as a means to increase both accessibility and the quality of higher education. However, my analysis revealed that this position is more rhetorical than realistic in the instructional context of Institution A, which has mainly focused on the cost-effectiveness of its instructional activities based on the traditional print-based production model and independent

correspondence study model. Despite their conflicted instructional design context where the paradigm shift discourse has been dominant but the actual paradigm has not shifted, learning designers working at Institution A tend to accept the new knowledge and norms produced by this rhetorical paradigm shift discourse (i.e., constructivist instructional theories and models) as truth—at least ideal. No matter how they have actually designed online courses in practice, it is difficult to deny that they, with a new identity of change agents in this online education regime, have contributed to the institutional transformation from a DE university to an online university. In addition, their theoretical beliefs about what constitutes effective instructional practice has contributed to the formation of institutional norms for effective online teaching and relationships among its member in Institution A (detailed in Chapter 5).

This chapter turns the focus of this thesis from the archeological questions about the discourses and knowledge to a genealogical examination of the power effects of the dominant discourse upon human subjects in a disciplinary institution. Foucault's genealogy is not concerned with the ideological level of social discourse but rather with the physical (and its operational) level of people's practices (Olssen, 2004b). Foucault examines the power structure of a certain social regime by analyzing the knowledge-power relations in a disciplinary institution, revealing the process of how legitimate knowledge or norms act to construct opposite human subjectivities such as good or bad. This process of subjectification inevitably involves both normalization and problematization of certain ways of thinking, talking, and acting (Foucault, 1995). The normalized population are likely to get more institutional benefits, whereas the problematized group can be disadvantaged, which is how dominant discourse produces unequal power relations among people (Foucault, 1995; Dean, 2010). This chapter, therefore, asks two genealogical questions: a) Who are the normalized instructors and what are their relations with the dominant discourses? and b) Who are the problematized instructors and what are their relations with the dominant discourses? Thus, this chapter does not ask the simple question "who are the effective teachers?" but rather investigates the relationships between the dominant discourses and how these have influenced the discursive images of who are considered to be the effective instructors in the online education context.

For that purpose, this chapter presents six case studies of instructors from this institution. The first two cases are the instructors who are perceived as effective instructors by the learning designers and other members of the institution. The second two cases are the instructors who are labelled as traditional instructors, and the last two cases are the instructors considered innovative. In this particular institution, I found the effective instructors and innovative instructors were considered part of the normal group while the traditional teachers were considered as a problematic group. Those instructors considered innovative have received greater recognition and institution-wide benefits whereas the traditional instructors have been disadvantaged and experienced various struggles with other members at the institution. I had an in-depth conversation with each instructor about their understanding of openness, innovation, and online education as well as their teaching practices. The analysis of the interview texts suggests that the instructors' subjectivities (or categories) at the institution are more closely connected to their attitudes towards research and online education than related to their actual teaching practices.

6.1. Effective Instructors

Case 1: Peter [Male, Professor in Faculty of Science & Technology]

This science teacher was one of the most engaging interviewees, who was very positive and confident in his teaching. His research projects related to teaching science in a distributed setting were mentioned a few times during my interviews with learning designers and he was characterized as an effective, good, dedicated and friendly instructor. Most of his teaching experience has been in a distance and online setting and he also holds both university and national teaching awards. His research interests lie in the design of online science courses and the use of innovative distance delivery methods for undergraduate laboratory work. Thus, Peter has been actively participating in different projects related to online education and systems. For instance, he led a large-scale university reform project in an administrative leadership position, with a total budget of \$14 million as part of two national economic stimulus initiatives under *Canada's 2009 Economic Action Plan*. Two foci of the project were to develop an integrated online system and to digitize all university course content through a set of multiple small projects. He worked with other faculty members participated in the project and he also published a number of articles about the project and its outcomes. To him, the institutional mission statement is particularly meaningful:

I've been with this university for 20 years and I really do have strong feelings about the mission, I mean, the social mandate in that. So it's one of the things I like about working in this place. *I feel like I am making a difference for students... working with people who have been up against barriers* and I am at institution that is little bit different so it's going to help them along. I have very positive feelings and then kind of have incorporated it into my own life. (Peter, October 4, 2013)

Peter holds a relatively traditional view about the institutional mission, students as well as openness. He explained the double meaning that applies to the openness principle realized through two institutional policies of open admission and year-round open registration, which enable any students come to the university and start their post-secondary level learning anytime. He has a very clear and harmonious understanding of the four principles revolving around the openness principle:

I think [the four principles] kind of work together if you put them in a right way... If you define excellence as our students who are coming in are the best students, if then, what would you really adding to their education... the one in the middle with the right encouragement with right teaching and right context, we can bring him up to the higher game. (Peter, October 4, 2013)

He also says that Institution A is particularly serving non-traditional students with its flexible approach to individual students' situations and educational services, which he believes, necessary for the institution's survival:

One of the things we've been fascinated about this university is it is... *very flexible for individual student...* If there is a problem or whatever, they will try to fix it and students really appreciate that because other universities just tell them "No. Regulations say no, so go away" but here "Ok. Regulations might say that, but maybe there is a special circumstance and we will see what we can do. Maybe we can convince the professor to give you one more extension"... It's a lot harder to do now because there are so many students now *but the culture is still there...* if you try pretending you are a student and phoning in and just say "I have this problem. Can you help me?" and then you will be surprised that people will generally be interested in and helping you out. If they can, they will. (Peter, October 4, 2013)

He concludes that this flexibility eventually helps the university achieve both openness and excellence in its educational service although he admits the excellence principle is little bit vague and "it doesn't differentiate us as much as some of the other [principles]". Peter additionally mentioned the new approach to openness in the institution when he says:

I am very interested in Open Educational Recourses (OERs) and how they are used. I am thinking that's another version of learning objects that you can share and move around... I think people will start using them like they use textbooks... I will love for some parts [in my courses] to say "Go

look at this. It's available on the Web. We downloaded it for you. You can access them on university server and so go through this exercise and do it." [Professors] don't have to develop whole textbook and multimedia resources themselves to do the course. (Peter, October 4, 2013)

He also published his recent book about teaching science at a distance through the university open press and this e-book is available for free online. As he mentioned earlier, I could see him having the social mandate in his institution's mission incorporated into his own teaching and life and this is where the innovation principle plays a significant role. To him the meaning of innovation is also very clear. It is about both technological and knowledge innovation to improve his teaching "We have been innovative and we are using things that will help our students with all other principles, excellence, openness, flexibility, and in that we renew ourselves all the time and innovate ideas." However, he did not stop there and continued:

This is my hope (laughing). How it actually works is another thing because like other universities, we can be fairly conservative and slow-moving. It's interesting since there are always people like Hunter [one of the instructor participants in this study who is considered as a leading researcher in online education] who are just forging ahead. They are just doing all sorts of interesting things and then we've got people in a middle group who are just starting to get used to LMS now. And, we got a few at the tail who say "oh... they hired me when we were doing print and that's all I am going to do. Just give me a telephone and paper and that's it!" (laughing) (Peter, October 4, 2013)

When Peter was asked, he put himself in the middle group. He has been incorporating some pedagogical innovations in his science courses such as home laboratory kits with simulations and remote control labs as well as publishing research articles and books about DE. Nevertheless, he believes he is not as innovative as some of his colleagues working in the fields like computer science or distance education when it comes to knowing and using online or more recent technologies. He tends to perceive innovation as something more technological and research-related than pedagogical or teaching-related, a view well-aligned with the new innovation discourse in the institution.

In fact, most of my interviewees tend to connect the notion of "being innovative" to "conducting research on online technologies" and distinguish the "innovative researchers" who are developing new educational technologies from the "effective teachers" who are using the technologies as Peter said "Unless it is your main

duty to develop marvellous technologies or conduct pioneering research, you will never be innovative enough in this institution.”

His attitude about online education is as positive and clear as his understanding of the innovation and the other three principles. He tends to take it for granted to do online education:

We need to show that we are on the cutting-edge. Now it's hard to say “Wow! We are at cutting-edge” by sending you a letter that has assignments in it although some universities have done that... I think about technology and accessibility. People are doing things online anyways as part of their social life outside the classrooms and learning a lot of things online. I have been always fascinated with science actually even as a scientist, you learn more about science like especially outside your discipline... it's all informal or non-formal learning and so it opens up all sorts of new possibilities. (Peter, October 4, 2013)

He is particularly excited about the possibilities for communication among students and tutors as well and he argues that online communication can have advantages over face-to-face:

Sometimes students open up to you a lot more than they would if you were face-to-face. I might get a student talking to me about [science] and all of the sudden starts saying my wife is leaving me or something like that. It's because you are close and available but you have a safe distance because it's online... Every once in a while, I found, for the shyer students, the ones that normally sit at the back and just quietly take notes and not participate, they are more [active] because it's like “No one knows me, sees me. I can just write”. They have more freedom to do that. So, I think in some ways it can help communication, too. (Peter, October 4, 2013)

Nevertheless, his pedagogical approach to online education does not necessarily correspond with the popular account of effective online education in the current literatures that emphasize student-to-student interaction. Instead he believes that students need more structured guidance and assistance in their course selection and distance learning. He comments on the connectivist learning theory that has been strongly promoted by several online education researchers in the institution including Hunter:

Connectivism. The idea is that you have so much information and people out there, all you need to do is to go online... you will just know where to go, what to do, which might be fine for somebody... but for the first year of undergraduate students, just to say “here is the Internet, you learn it”. No, I think they need a little bit more guidance than that. So, I am being cynical (laughing). (Peter, October 4, 2013)

Although he has a traditional image of distance students who are adults with diverse barriers to university education, he does not see them as autonomous or self-regulated. Instead he seems better understand that these non-traditional students have more difficulties and responsibilities in their lives and so need more assistance. These excerpts suggest that he is a very student-oriented and teaching-oriented instructor. His design focus is accordingly on developing more media-rich, engaging and seamless educational experiences and he says, “I am not satisfied. Every time, I come to revision, there are always ideas to make it better and I wish I can do more and wish I had resources to do more.” His comments attest to his commitment and how he is enjoying teaching at a distance and online:

When you are working with students and they finally get something, they understand it and you get that sense, it’s better than any other awards. You feel like you made it. Every once in a while, I run into old students and they say, “You were my professor and remember you did that.” I see them everywhere... Teachers must get the personal connection and feeling that you made a difference. (Peter, October 4, 2013)

Case 2: Kevin [Male, Associate Professor in Faculty of Humanities & Social Sciences]

Kevin, the second case of the effective instructors first suggested we talk by Skype since he worked from a home office in a different town. While scheduling the interview with him, I got the impression that he was almost always online because he was very quick to respond to my emails as well as having many other Skype meetings scheduled in the week. When we started the Skype interview, he suggested I turn off my camera to improve the quality of audio sound, which also implied that he was quite familiar with using this communication tool. During the interview, he agreed, “Yes. I feel comfortable with technology. I enjoy experimenting and learning about technology... but I don’t use technology just because it is the latest thing, I use it because it is useful.” He introduced he has two research strands, which are a) research on legal issues and b) research on teaching and learning. His earliest publication about online learning of law school students dated back to 2000. Also he used to be a blogger (writing online journal entries) starting in 2007, which he continued until August, 2010. Similar to Peter, most of Kevin’s teaching career has been in distance or online settings.

Throughout the interview, his comments were clear, concise, and straightforward and his responses were never redundant or off topic. As a result, we had the shortest interview, which took only 53 minutes for all the questions. His clear description about the openness and innovation principles demonstrates this conciseness:

The openness is both the openness of entry requirements to the university and also the openness in terms of accessibility of the learning and learning materials... at least two different concepts of openness... The other aspect of openness of the study materials is something that we have worked on just this year and we have helped to create study materials as OERs so the primary study materials in the program are going to become available as OERs to anyone in the world within the next month. (Kevin, October 1, 2013)

Of course we can have innovation, I think, in several different variations. I think one would be use of technology, one form of innovation using different technologies... so in that program, we are starting to use Adobe Connect, for instance, as well as our Moodle system... we Skype as well sometimes. So that's one form of innovation. The other innovation, I guess, would be the OERs publishing the materials in open format. (Kevin, October 1, 2013)

As made clear in the excerpts above, Kevin is deeply engaged in the OER initiatives and so his focus on achieving the openness principle is to provide educational resources for free, which is closely related to the current view of openness in the field and society. For the innovation principle, he seems to only consider pedagogical innovation facilitated by technological innovation. He picked excellence as the most important principles among the four and explained the notion of excellence very clearly as, "Because particularly we talk about legal materials and it is so important they are accurate and correct and not misleading in anyway. So in terms of excellence of the program and excellence of study materials, I would have to put them first." This was a quite unique answer as I found that most other interviewees struggled to define excellence and pointed out the vagueness or emptiness of its meaning. After repeatedly reading his interview, I realized his focus was exclusively on teaching, that is, he believes that his major role is to provide students and the public with excellent courses or educational resources. When I asked him about his perspective on the relative priority of research and teaching, he did not hesitate to answer:

I would say teaching. There is so much in the law that the public do not understand... There is a lot of legal knowledge that already sits there. To me, it's probably more important to make that knowledge more widely available than to accumulate more knowledge. (Kevin, October 1, 2013)

He continued, “I think I am very dedicated to making our education as open as possible.” His active participation in the OERs initiatives and other funded research projects such as expanding access to legal services through E-learning is well matched to his personal understanding of his institution’s mission. In fact, this clear focus on openness in his words implies that Kevin who joined the institution in the mid 2000s was never involved in the traditional discourses about openness and the complicated discursive shift. Instead, he arrived with the new expanded notion of openness, which contributes to his relatively straightforward approach to his work.

His perception about online education is also not very different from the dominant views about it in the field of online education and broader society. First, he believes “online education provides access to education, which was not available in other forms... it brought in the possibility for the public, for anybody who has a basic literacy to participate in education.” He also argues that online learning is unique and better than face-to-face learning because online technology is a reflective medium:

For instance, often asynchronous communication can be used to stimulate reflective thoughts. It allows students to think about what they are learning in their own particular context and then to try to explain that in their own words... For me, it is primarily an opportunity for individual students to learn independently but in a reflective way with an assistance of instructors or lecturers or tutors. (Kevin, October 1, 2013)

He shares similar ideas about effective online course design with Peter’s. Although later he mentions, “I would like to see [students] have more discussion, exchange of ideas within the course. But it is always difficult for students who are studying independently”, it seems clear that he has not bought into the popular theoretical approach to online education based on interactive or collaborative learning theories:

[S]tudents need a lot of structure in their courses in order to understand how to progress through the course and how to utilize study materials in the best way... how to make online courses speak for themselves without a professor... telling students and guiding them as you would in normal classrooms. I always think of it as being and taking the place of a classroom and so student who enters the course has to know where to sit and what to read and what to look at. (Kevin, October 1, 2013)

6.2. Traditional Instructors

Case 3: James [Male, Assistant Professor in Faculty of Humanities & Social Sciences]

When I first sent him an email invitation, James responded, “I am not sure whether I can be of much help to you. I am *the least effective member of [Institution A]*, and I have been unable to meet the requirements of my job. There are many faculty members that you will find far more useful to interview.” Thankfully, he accepted my second invitation with one condition, not to meet at the university. So I met him at a cafe near the university office. The entire conversation with him was very interesting and both intellectually and emotionally stimulating but at the same time less comfortable than the conversations with the first two instructors. During the two hour interview, he gave me good background and insightful comments about the history of the institution. He is a social theorist, activist, distance teacher and textbook author (e.g., his latest book is an introductory book of classical social theorists). His academic works cover a wide range of social studies and he says “he continues in an uphill struggle to align his personal practice with his political theory.”

James showed both strong animosity towards, and attachment to, the university. Although some of his comments and responses contained strong and complex views. For example, he used the expression “square peg in a round hole” to characterize his relationship to the university and explained “it’s an expression to mean you are a misfit, you don’t fit in. That’s how I’ve always felt at [Institution A]” and he continued:

I don’t like bullies whether they come from the management or they are my own colleagues. I’ve been on the receiving end of both of those kinds of bullying. So there are very few people I trust at [Institution A], just very few close friends... So I try not to have too much interaction with the university. *It normally brings me nothing but grief* and it distracts me from what I should be doing. (James, October 4, 2013)

From the beginning of our conversation, he made it clear that he does not maintain good relationships with other members at the institution as well as identifying possible discursive conflicts between his personal narratives and the institutional discourses. James was actually on the original committee that constructed the mission statement in 1984 and 1985, which suggests that he used to actively interact with the university and other members. He said that the mission statement was developed through the collective effort of early members of the institution who had very different political beliefs. Nevertheless, openness was a strong and shared goal among the members at that time. The four principles were not a part of the original mission statement and openness was the only common principle in the statement at that time. He says:

Different individuals contributed to different phrases. One I was responsible for was “increasing equality of education opportunities” and one of my colleagues insisted on putting “barriers to...” that wasn’t mine. But it was a combined effort and each of us contributed the things that we thought was important to that. (James, October 4, 2013)

Not surprisingly, to James the most important principle was openness and he gave a comprehensive overview of the meaning of the principle in regards to his teaching. He provided much more sophisticated and in-depth explanation on the openness principle than the other instructors that I talked to. His main approach to openness remained unchanged but it has rather been reinforced through his teaching and interactions with students at the institution:

Openness means to become a student at [Institution A] you do not have to have your grade 12... That’s how openness is defined for the purpose of this mandate. Virtually anybody on the street can have a shot. That can be a bad thing *if they are ill-prepared, it means we are taking their money and giving them nothing really return because they can’t make use of this opportunity that they may have... Some students are struggling.* They have to struggle to get the time. They are *single mothers* with children and earning a living. Sometimes, they need some recognition from us of just how hard it is to become a student and to fulfil those requirements. Sometimes it’s difficult because on the one hand, I have to maintain standards. If I receive the paper, which isn’t written well, which has grammatical and compositional problems, *it’s my job to show that the student has problems but can overcome those problems.* It’s my job to show the student how to fulfil themselves, to move beyond... *but in order to really begin the teaching process, there is a point of contact in which you have to recognize the human being on the other end of the relationship.* (James, October 4, 2013)

Like Peter, James was also aware that simply providing a chance does not guarantee the academic success of many ill-prepared students coming to the university because of its open policy and so they need more personal guidance and attention from teachers. In this sense, to James, the teachers’ role is critical in fully achieving the openness principle. His strong dedication to distance teaching seems to be deeply grounded in his belief of the value of what he is doing for the marginalized groups in Canada that include first nations, women, and prisoners. He showed a particular commitment to the prison program, which is not available anymore:

I taught at [Institution A] in the prison system for a while with maximum security... we’ve given up on the prison’s program and that’s not our fault really, it’s a conservative government. It doesn’t provide any funding to the prisons. We used to share the cost, we provided all the course materials and they provided the money to put an instructor... We have to have real instructors in class because it may not allow [prisoners] to use the computers or at least not go onto the

Internet... *I feel bad about that and I am still trying to see if it is possible to resurrect that program.* (James, October 4, 2013)

Overall, James seems believe that the university can strive for more openness, that is, to reach out to more underserved populations and in some sense, it has become harder to provide opportunity to disadvantaged groups:

Under the circumstances, I think we have continued to try to fulfil the mandate, but I am sure *we are failing in certain ways... because our course fees are going up... that means working class and poor people can have less and less opportunity.* I don't know how we can solve the problem except by having certain volunteers go out into the community... We used to have [those volunteers]. One of my colleagues organized that. But he got fired and unfortunately, many of my colleagues helped to fire him cause he hadn't finished his PhD, and I still feel bad about that... [if we reorganize the volunteer system] we could do more kind of volunteer work but it's not gonna happen because we all feel so stressed out right now and insecure. (James, October 4, 2013)

This excerpt also hints at the origin of his disappointment about the university and his colleagues. For many people, particularly those putting more value on excellence or innovation than openness, there seems to be nothing problematic with firing someone who does not meet all qualifications for the job. This legitimate or reasonable event to many others at the university, however, was perceived as an injustice by James because of his commitment to openness and because he values organizing the volunteer system more than conducting research. He also has a traditional understanding of the innovation principle, which mainly concerns pedagogical innovation—that is, improving the effectiveness of distance courses. Nevertheless, he does not believe that adopting online technologies has resulted in pedagogical innovation in his institution:

It's more problematic. *For a lot of people, I suppose, it means online courses.* Online means so many things to different people... I am not really fully knowledgeable of all of the online possibilities. *I haven't had time to keep up with that...* I know some of my colleagues expect me somehow to develop the course, so people can receive it on iPhones... but I am not really excited about that too much. At least people should be in front of their goddamn computers to download these. (James, October 4, 2013)

His position seems to clearly disagree with the dominant discourse in the field of online education, particularly the assumption or claim that technological innovation leads pedagogical innovation in DE (see Chapter 2). In his explanation about excellence, he also reveals a critical position towards the new discourse that

technological innovation, particularly the one involving online technologies would lead to more effective distance learning:

If you look at the arrangement of courses, you will see very different quality of courses. Some of them, they are like *the old fashioned kind of movie*; detailed, meticulous, each part of the unit is laid out in detail. Commentaries are provided to make students think about the readings. Sometimes the original discussion is entered into it. A list of supplementary readings and up-to-date bibliographic resources. That's the old fashioned way but I think some of the new courses get a textbook, generate a series of multiple choice questions for the textbook and put it all together online. Some people will regard it as innovation and excellence I suppose. You are talking to the wrong person then—that doesn't strike me as that exciting intellectually. (James, October 4, 2013)

It was interesting that James did not mention research at all when he described the four principles so I specifically asked his opinions about research-based innovation. In response, he first distinguished *mission critical research* (research into distance learning) from disciplinary research and then *grant-oriented research* from private research (independent research). Then, he introduced his ways of doing research:

When I wrote a book about classical social theory, I was trying to find a way to show how people like Plato and Karl Marx... their 18c - 19c ideas still have important applications to understanding a modern world. That's got nothing to do with distance learning education... You will find when the term innovation, it's mostly [about] grant-oriented research because that brings money in. [We] don't bother with grants, we are very old-fashioned, we are kind of going back to Socrates. We just publish books because we have something to say not because it's a form of revenue. It's not a popular perception of research any more. (James, October 4, 2013)

Although he has his own reasons for his research practices, it is certainly different from the current institutional norms of the new discourse about the importance of innovation. He continued and provided a more detailed illustration about this shift in the institutional perception of research and teaching:

There was one time... we got assessed every year, annual assessment and many years ago, the one time I got unsatisfactory. That was the year that I published my first book, however, I did not finish producing the course that I was supposed to produce, that's how important course production was like 15 years ago. You could actually produce a book in the academic year but if you didn't finish the course that was even more trouble. Today, that has changed. Today, you can produce many courses but if you are not doing any research you might get an unsatisfactory. (James, October 4, 2013)

Later in the interview when he described his approach to course design, he again mentioned about the relationship between teaching and research. He adds that the ultimate purpose of doing research for instructors

needs to be to update their subject-matter knowledge and expertise so as to provide up-to-date information to their students, a view that would seem traditional or limited in the current academic culture that emphasizes research productivity. It is clear that he is holding a strong pedagogical belief, which may not be easily compatible with the recent pedagogical approach to online education, but at least his pedagogy does not conflict with his personal conviction that openness is an ethos of the university:

I see myself as a craftsman or artisan in the same way someone who used to make shoes. I take pride in my work and I don't expect my course to be able to keep up with all news week by week. I think the course is solid enough to provide students with conceptual and analytical tools. It doesn't matter if it's get a bit out of date. That's not the issue. The issue is the core of the course is academically sound... someone at U of T who teaches a course like me doesn't have to worry about what anyone else thinks. It's all in the classroom. It's all private but when I produced the course as a booklet, anybody can pick it up and "What a lot of bullshit this is. This guy didn't do central reading. *He's not up-to-date in his research.* This is pathetic." So we [older people] go to great length to show that our courses stand up under scrutiny. (James, October 4, 2013)

James also made a self-deprecating joke, "I am an old geriatric narcissist" towards the end of the interview. As well as he repeatedly stated that he is older, his thoughts are traditional, and his practices are old-fashioned, that is, he was also well aware of the discrepancy between his ways of design and teaching courses and the ways currently expected from the university. This clearly implies the effects of new discourses on his problematized subjectivity as a traditional instructor. However, the excerpt below when he talks about how to be a good distance teacher at Institution A made me recall a recent claim in the literature about the role of online teachers and students in the academic field:

It's different from one person to another. All of us have certain resources as a human beings and we have to find the way to maximize or capitalize on your resources to become a good teacher. For some people, that's their ability to develop websites and introduce interesting technical features into their teaching methods. *But for those of us who are from the old school, we started out teaching people in real classes.* I guess we still believe the most important thing is to develop the personal chemistry with the people. Not to regard them as the piggy-bank, we put our learning into them. *All students have something to teach us... so the first thing is to realize that their teaching process is two-way. It's a reciprocal relationship.* I think everybody will probably say that but I am not sure if everyone actually acts according to it. (James, October 4, 2013)

While his teaching philosophy is not entirely identical to the popular or typical (social) constructivist learning theories in the field of online education, he did reflect the most productively constructivist understanding

about the relationship between teacher and student and thus stood out from all the case-study interviews. While he believes that having peer-to-peer communication in the course is not necessary, he appreciates having in-depth interaction with individual students as a tutor. The best way to develop the reciprocal relationship with students, to him, is having a telephone call, which would be also seen traditional to someone at the institution, he says “when you are dealing with students with phone individually in distance learning, you often go into greater depth and you learn more about your students.” The biggest source of his satisfaction seems to come from his own teaching and interaction with students. He said that he looked himself up on a website where students rate their professors and found one negative entry that called him a “Grammar Nazi”:

It must be someone I was correcting his grammar... but this guy spelled *grammer* (laughing)... mostly students appreciate because when students send me an assignment, I printed out and I go through the print and make all the changes including grammar changes and then I go back to the online document and then I reinsert all these changes... I often put “indefinite pronoun, which doesn't have a proper reference” or “incomplete sentence, it doesn't have a transitive verb”... I put all these things back into the document and I send it back, so then additionally I send a comment sheet, which I write out just comments... one, revised document from me and second, the comment sheet. Every student gets that. I am even on final exams, I read the final exams I send back comments on each question... most students appreciate that. It's taking time away from research... *the first thing for me is to take care of business for students.* (James, October 4, 2013)

Beyond the current behaviourism-versus-constructivism debate in the field, his pedagogical beliefs are more genuinely based on his experiences and commitment to his students. These seem to be effective teaching practices, at least to me, and this case study does therefore problematize our common perception that traditional teachers are, by default, ineffective teachers.

Case 4: John [Male, Professor in Faculty of Humanities & Social Sciences]

Three learning designers talked about John as someone who dislikes online learning even though he knows or understands little about it. Two of the designers were actually working on his course, at that time, and mentioned that they were having considerable difficulty in persuading this traditional professor to use the more interactive functions of Moodle, their online course platform. These comments made me imagine a very stubborn and authoritative old professor in the humanities. Contrary to the image I expected, he was surprisingly friendly and unpretentious and so it was very easy and comfortable to have a conversation with him. For the interview, I visited

the main campus located in a small town. His office was located in a new building (among the two buildings) constructed in 2011. When I first entered the Centre for Humanities on the second floor of the building, there was a female staff member who welcomed me and she pointed to his office with a large transparent glass door. Through the door, I could see him looking at a large computer monitor on his desk. I felt his office was open and well-lit. During the visit, I came to learn that a motif of the building design itself was openness. A website of the architectural company that designed this building introduces its design as:

[T]he campus is a unique post-secondary institution, offering distance learning, with some on-site learning opportunities. This contemporary building houses all of the University's Academic Centres... and a number of flexible meeting and collaborative spaces. The space is bright and open, its clerestories [the upper part of the building containing a series of windows] and high window walls taking full advantage of natural daylight and the site's pleasing views.

Although John was also familiar with the mission statement, he was not as enthusiastic as Peter or James but rather sceptical about its usefulness as a guideline for members' practices:

[W]hen you look at this mandate statement, it is fairly high level in sense that this is kind of thing that administrators want for the politics... It's also partly a way to identify ourselves and distinguish ourselves from other institutions. *Because it is that high level doesn't mean you are going to get...* Because there are so many other forces that work that sometimes we can satisfy this mandate, sometimes we can't, and sometimes we have to pretend that we do alright... having said that there are number of *people in this institution who take it very seriously and they design their courses to be as open to various groups, especially disadvantaged groups, aboriginal groups, people in prisons*, you probably heard people talk about the prison program, which hasn't been terribly successfully because of a lot of external forces including security in terms of our correctional system. (John, October 2, 2013)

He continued and pointed out the contradiction in the phrase "barriers that restrict access and success" related to the openness principle:

[T]hose are at odds. You can allow marginal students or many even incompetent students into the system. So you reduce the barriers to get in but they are not going to get out, right? Because *they are just not capable of doing university level...* I face this numerous times just realizing that students came in very excited and they started reading the materials and realized that they don't understand it. So... there is a tension there I almost feel like well... maybe we should increase the barriers to make sure that those who get in are capable of handling the materials. Or we reduce the difficulty of the material and then you got problems externally and other institutions wouldn't recognize you. (John, October 2, 2013)

John also asserted that there are potentially conflicting relationships between the openness and excellence principles in the economic operational line: “as you want to increase the numbers, you are going to reduce the chances of actually getting excellence into the system because you are then start focusing more on pushing people through this system as opposed to really educating them.” The idea of innovation to him seemed even more meaningless to discuss and he almost refused to talk about it after saying, “you can innovate but it depends what you are innovating for.” He concluded that those principles do not mean anything clear because each of those principles is already too ambiguous. In other words, according to him, it may be very challenging to pursue and achieve all four principles together at the operational or physical level of course design in this university.

Similar to James, but for different reasons, John was not very happy with his institution. He used a metaphor “weak sisters” to describe the status of his program along with others in the humanities or liberal arts in his term:

What [provincial government] wants the university to do is to serve basically the business and industrial or economic interests of the province... That means that the value of the liberal arts as perceived by the province is minimal... There’s not a lot of support [at the institution]. Since I have been here, since [mid 90s], we’ve been trying to develop the program and get enough faculty to have a credible department, but we are going backwards and actually lost one... we’ve got lip services from administrators to support the development of program *but there is no money*... that’s the way in which the liberal arts are being choked and eventually I think we will see it disappear. (John, October 2, 2013)

One clear thing I found out during this interview was that his main concern is not about the mission of institution but survival of his own program and courses:

I am more aware what’s happening in the United States and Canada and in even Britain. They all closed [his program]... unless you can get the enrolments, for somehow, you usually have to find the way to get your course required in the program... to get the numbers and then you could avoid the shutdown... when I started out, [his program] wasn’t like that. [There were] many courses, senior courses with only a couple of students in them [but] now it’s getting harder and harder to justify doing that. (John, October 2, 2013)

Indeed, several interviewees blamed maintaining courses with a small number of enrolments as one of the causes of the financial stress at Institution A and further attributed the stress accruing to its students as resulting

from the increase in tuition fees. This justifies his concern about the programs' survival. For example, Hunter (Case 5), categorized as an innovative instructor, argued:

The British Open University. If there is a course with 55 students... then forget it, just close down. That's our average. We have some that have two students in year or 4, 6, 8 and... that means we have to have a tutor assigned and we should have just said any course has less than 10 is out, but we never had a strong enough leader who... because the faculty members would said "oh... we have to give full choice." (Hunter, September 28, 2013)

One important tension of this position was that, while John is ideologically distant from the discourse of openness, this principle tends to be actively operating in his program or courses far more than he perceives. Specifically, despite his critical approach to the idea of openness, which he argues reduces excellence, he would not deny that he needs a certain level of student enrolments to maintain his program and probably more students to get institutional support for program development. If the university did not have the openness principle, which often conflicts with its economic value, some of the courses in his program, particularly those senior ones, may have been already closed down. In addition, he is physically located in the open concept area of the office building!

When I prepared for recording the interview conversation using a voice recording application in my smartphone, John started talking "You are way ahead. I've just given up that style (looking at my smartphone). I can't figure it out. So you talk about online. I am *barely capable of doing this online*, in fact, I am putting my course up, right now, and it's extremely difficult for me." Interestingly, however, he was one of the first faculty members at the institution who designed and taught online courses in 2002. He explained:

I've been doing this [online teaching], I think, since [the early 2000s] and my general impression up to this point, has been that it's very inadequate for number of reasons. The only reason why I started my course online, which is [a name of his first online course], was because we had a course development frozen but *there were funds for online development of courses*. So I agreed... it was an enormous struggle trying to figure out how to move because *I come from a lecturer in face-to-face university context where I had been teaching for 12 years*, when I came here moving to text-based was hard enough. But I moved online it was even more difficult. (John, October 2, 2013)

No matter how many struggles he experienced with his first online course, it was clear that he got a financial reward for doing online education in the early years and stated inversely that he did (or had to do) online education to get the financial reward. It was very interesting that John, who was one of the early adopters of online courses at Institution A, is called a traditional instructor who disagrees with doing online education after a decade. I was also struck by how much he still felt uncomfortable with teaching online after doing that for more than 10 years. Comparing the online experience with that of reading a printed textbook, he commented:

It's much more difficult online when you are scrolling [or] you click on every paragraph, it's annoying and it's hard to maintain the logical flows of ideas. So you have to put paragraphs together in logical units, which is not particularly easy either because some of the logical units in [his discipline] are long... cause you contextualize the problem and you develop each part of the problem and then you start to address how to solve that problem or think about the problem. We can't do that in just nice short snappiness. (John, October 2, 2013)

John also has very clear models of teaching that came from his own learning experience as a student at a campus-based university. He named these the "conversation model," the "biological model," and the "mentor-student relationship." He also argued that learning is:

[A] matter of an individual just working through the problems, the ideas in isolation. *It should be private*, quiet, but at some points you have to test... those ideas in a conversation. So if we think all what we are going to do now is to put the stuff online and somehow make conversation irrelevant, we are going to be, I think, in bad shape... *[Good students] would engage you much more over the phone*. So they have a question, they email with the question... if we get into the fairly complex discussion through email, I will phone them. Then, we have that more dynamic interaction that's fairly close to face-to-face at regular university... just can't happen on paper and at least that never had happened on paper even on email. It's probably because [his discipline] is dialogical. *It really does require conversation to really move into depth*. (John, October 2, 2013)

He gave me a few examples of how he had been engaged in phone conversations with his students although he made it clear that it is not the case for all his students:

I have a couple of students recently who read materials and ask me questions that I was struggling to answer... it's such a pleasure actually *it's what makes teaching really, really exciting*. It is scary at the same time it is exciting. I had students I corresponded with and I am still corresponding with some of them after the course because they just find the stuff either interesting or important in their lives. It's what makes the sort of academic community relationship so vibrant. (John, October 2, 2013)

His stories somewhat resemble aspects of James'. Both of these two traditional instructors have put a lot of focus on the teacher-student relationships. Their disciplines, in Faculty of Humanities & Social Sciences, which are relatively similar to each other in their academic characteristics (compared, say, to disciplines in Faculty of Science & Technology) may also have had a major influence on their pedagogical beliefs. One more important thing that I noticed about these two instructors is that they used to teach face-to-face in their early teaching career whereas the two effective teachers' teaching experiences were almost entirely concentrated on the DE context. That is, the establishment of their personal beliefs on effective teaching seemed largely influenced by their earlier face-to-face teaching experiences and their perception and practices would certainly have been considered normal in the previous DE era when face-to-face teaching was a norm and standard. Unfortunately, in the current online education context, their teaching style is likely to be seen as inefficient or time-consuming particularly by learning designers. When it comes to the comparison of communication media (e.g., phone versus the Internet) and the number economics (1:1 phone conversation versus many-to-many online discussion), it may not be easy to argue that the pedagogy of these two instructors is not traditional. Additionally, their teaching practices are so private that other members cannot exactly see what they are doing and how they are teaching in their courses as tutors, which makes it more difficult for them to receive fair or thorough criticism on their teaching.

John first admitted that, "I know people recognize me as abnormal, but it's ok" and continued to argue that having online discussion is not useful with a clear example:

If I am taking a course with a professor, I am taking it because he or she is the expert. I wanna know what he or she thinks about this stuff not my fellow students who might read the text once or twice and have no context for explaining that. Courses are like that I remember I thought "oh... my god. I gotta get out of here cause I am not gonna learn very much except maybe I am either a lot smarter than my fellow students or a lot stupider than they are!" (John, October 2, 2013)

One interesting difference between these two old-fashioned, but not necessarily ineffective instructors, was in the target group of students with which each of them was engaged in the conversation. That is, whereas James paid relatively more attention to the disadvantaged students who did not have the necessary academic skills, John tended to feel more rewarded when he had an intellectual conversation with good students (about the top

10% or 5% of students in his class). I assume this difference has some relevance to their different attitudes to the institutional mission.

6.3. Innovative Instructors

Case 5: Hunter [Male, Professor in Centre for Distance Education]

Hunter is one of the leading scholars in the field of distance education. Therefore, I had already read his books and articles and so had been quite familiar with his theories and approaches to online teaching and learning before I met him. He had won world-wide recognition through various research projects, publications, and active academic activities. These academic activities also had contributed to the reputation of Institution A for its excellent profile of innovative teaching and research. *The Annual Report*, published about a year after he joined the institution, excitedly introduces him as a new member and his research profile on distance education:

[He] looks at the interaction that occurs within the distance education model, whether between students and instructors, or students and their peers... He hopes his research will help [Institution A]... He appreciates the environment at [Institution A] because the subject of his research is so closely related to the university's strategic goals. This has not always been the case... [he] says "Coming to an institution where my work is situated at the forefront of mission critical research is a great opportunity, if just a bit scary as well."(p. 37)

In this interview excerpt, he appeared optimistic and enthusiastic about being a member of the DE institution. The same report lists five of his externally funded research projects. Having considered that the total number of the externally funded research projects at the entire institution was 22 in those two years, it can be said that his contribution was quite exceptional from the beginning of his career at Institution A.

Since then, Hunter has been actively engaged in many mission critical and grant oriented research projects and his works have been continuously introduced in institutional documents. Throughout these publications, he has been labelled as a researcher rather than a teacher or instructor. He has been also leading technological innovation in the institution:

I first came... we didn't even have a learning management system... so I used the nursing faculty's. They had Blackboard and WebCT so I used them and taught with them. And then I realized that we had no web conferencing system and I had a small research grant so I bought the first one and

put it in. Then we didn't have a synchronous voice... so I used research money to buy that and gave, allowed anybody in the university to use it and then finally [Dan] and I built [*New Platform*] for last three years. (Hunter, September 28, 2013)

Given this background, it is not very surprising that he was mentioned by all learning designers and the 6 instructors that I interviewed as a leading researcher or a representative researcher at Institution A. He also identified his role as someone leading innovation:

I sort of have taken on that role as a kind of champion of innovation in our centre. So I keep telling everyone that we are not being innovative enough and so I think it drives my relationship with the rest of university and to some degree in the courses I designed and developed as well. (Hunter, September 28, 2013)

This innovator's perception about online education is in line with those of many online education researchers. He explains two reasons behind the growing popularity of online education as its accessibility and interactivity, which dismiss the claim that DE is pedagogically inferior to face-to-face education.

[B]ased on technological point of view, it's because the online was able to eat up all of other media so that you can take television... put it online, you can take threaded discussion put it online, you can put textbook online... everything... *it allowed, at lower cost than previous media, the distribution and production, multimedia all this sort of thing...* it also became technically and economically feasible... affordable. But secondly, I think *it added pedagogical enhancement...* distance education was perceived as broadcast mentality and in especially elite universities by the time when constructivists started... and it got really strong in 1990s, it was perceived that that broadcast kind of one way dissemination model was really inadequate for higher level of learning... [However] all the sudden the Net can turn around that claim... You can have a community of inquiry at distance... get in higher levels of scholarly interaction than you can get in face-to-face even so really completely destroyed all these arguments about the inferiority of distance education based on the pedagogy. (Hunter, September 28, 2013)

However, when he reflected on his past experiences in the institution, I was surprised by his negative tone, which was almost contrary to his enthusiastic voice in his earlier interview in the early 2000s:

[Before coming to the university] I wrote a strategic plan for [a traditional university where he was working] to get into distance education and they basically turned it down and said "[Institution A] is doing that so we don't have to worry about that..." So, I actually wrote the plan for [Institution A] to take over... I got the offer from the Canada Research Chair here... So I came and thought this is a real dedicated distance education in line with my thinking... but I started to realize what *a stuck machine* it was in many ways. (Hunter, September 28, 2013)

This excerpt indicates that he was actually the one who wrote the strategic plan for Institution A to move into online education. Unlike both his and the general public expectations that online education be accessible and innovative, he does not seem to believe that Institution A has satisfied these expectations. In terms of the openness principle, first, he said:

I think we do try to make it possible for at least people to have a chance. [However] one of the things *we have failed miserably* in is that we talk about ourselves as an open university but our fees are *way, way, way too high* and we blamed government, we blamed this and that. (Hunter, September 28, 2013)

He expressed a certain dissatisfaction with the institution and other members at the institution not fulfilling the pedagogical potential of online education and is more explicitly revealed in his explanation of the innovation principle. He also gave an example of people having different ideas about what innovation is:

[W]e haven't moved... we haven't even yet made the transition to online learning from correspondence in the undergraduate programs. Still a lot of courses are... going online means you take this study guide and you put it in the Moodle book. It's not really that much different and we talk about innovation... When I look at whole undergraduate program, there are so many things that we have not done very well. But the problem is, even up to till these days, when people talk about the undergraduate program, people say "well... it's the highest quality of undergraduate programs... they can't be beaten because there is nobody who's got good quality of programs like us." And other people will say "Are you kidding? *This course is so old-fashioned*. I've been embarrassed to have this course" These are the same people talking about the same course. (Hunter, September 28, 2013)

Therefore, Hunter believes that although the mission statement is a useful way to give the university an unique identity different from other universities, it is not very effective for guiding people and their practices because:

[There] are contesting discourses. Because people have different ideas about what openness means and what innovation is... they can lead to mutually opposing decisions and suggestions that are both based on how one interprets the mission statement. (Hunter, September 28, 2013)

When he talked about the slow adoption of a new platform¹³ that he and his colleague developed as an alternative to Moodle to improve the pedagogical quality of online courses at Institution A, I came to understand more deeply his frustration over the complex and challenging nature of being a true innovator in this institution:

[*New Platform*] has all been what I consider to be almost game changing technology for online learning and yet, adoption of that has been extraordinary slow. We have had [*New Platform*] for three years and then I've been telling, I've gone to every faculty and given presentations, shown them how easy it is, why they would want to use it, I've gone to learning designers three different times asking them to build [*New Platform*] into their undergraduate courses. They don't do it and learning designers blame the faculty, the faculty blame the learning designers and everyone blames the deans and students. So it's always somebody's fault that we are not innovating and doing this... So you might say I had a big leadership role but I am a big leader but I don't have any followers (laughing). (Hunter, September 28, 2013)

Although he believes that people do not follow him and that he has not successfully changed and improved the online education practices at the university, it seems that he has exerted a strong discursive power that has contributed to the openness discourse in the broader academic field beyond his university. His approach to the openness principle is more practical than ideological. In other words, his ways of increasing the openness at Institution A are most closely related to the new discourse of openness emerging with Internet technologies and the OER or MOOCs phenomenon.

He suggested several strategies to alleviate the issue of the high tuition fees at the operational level such as closing down those programs and courses that do not recruit a certain number of students. He thinks that maintaining these weak sisters (using John's term) would eventually increase the overall cost of educational services and so decrease the accessibility of the services. Another way of reducing the cost of the courses, to Hunter, is to use the OERs. Although James also perceived this high tuition as one of barriers for the economically disadvantage groups, I suspect he would disagree with Hunter's solutions. James would argue that the university must keep courses open—even for the five students—and he would not be willing to use open resources unless they were of very high quality.

¹³ For the purpose of preserving anonymity of my interviewees, I will refer to the new platform as “New Platform” rather than revealing its actual name.

Nevertheless, Hunter has been actively involved in or strongly committed to the various OER initiatives. For example, all three books that he recently wrote or edited are available for free as a form of e-book through the university open press. As well he has long served as the editor of one of the first and most prestigious open journals in the field of distance education. Thus, it seems to me that he not only holds the expanded definition of openness, which is currently dominant in the university but has also led the emergence and development of the new discourse both in the university and in the academic field. Despite his personal unease over being unable to innovate the ways that undergraduate level online courses are designed and taught, he acknowledge several times that he has been receiving more institutional benefit than other members at the university:

I've been promoted and I've gotten paid and I've got lots of freedom and so in many ways it's a dream job... I was treated well personally and again, I can sit in the graduate program and I do get innovation there, add new technologies and things that if I were an undergraduate teacher, I would be blocked down, not be able to do. (Hunter, September 28, 2013)

In fact, he has designed and taught at the graduate level only, which is quite different to the way that undergraduate courses operate. He teaches 2 small graduate courses, which are cohort-based and semester-based, on *New Platform*, the more interactive and flexible learning environment. He commented on his course as, "it's pretty innovative and I think students like it and I get good reviews and so that's been fine." Considering James, a traditional instructor, was teaching 4 undergraduate courses and coordinating 12 courses at the time when I interviewed him, it can be assumed that Hunter's teaching load is also relatively lower than others, which gives him more freedom and time to conduct his mission critical research. In this sense, he seems to be quite satisfied with his own personal research conditions and online teaching experiences at the university.

Case 6: Grace [Female, Associate Professor in Faculty of Science & Technology]

Grace did her PhD in computing sciences and now she is doing collaborative research with her colleagues on intelligent learning management system (LMS) that provides learners with more personalized and adaptive online learning experiences. She explained her motivation to come to Institution A:

I had a chance to collaborate with people that have backgrounds in education. That was a really good chance to kind of improve things... when I saw these LMSs, they were not really looking into "who is a learner". And I felt that this is one of the reasons why face-to-face learning is so

much better [than online learning]. But on the other hand, I knew that computers have a lot of capacity. They can calculate... analyze diverse characteristics of learners and different learning situations... So I was motivated to develop an intelligent LMS and to do the kind of research that I am doing now. And then I did a post-doc here at [Institution A] and after a couple of months, I got an assistant professor position offer. So am now an associate professor. (Grace, October 3, 2013)

Most of instructors that I interviewed told me they came to Institution A because they were either motivated by the social mission of the university or interested in distance teaching. Also, many told me that this is not a good place for conducting research due to inherent structural limitations. For example, many programs have only a couple of full-time PhD faculty who are physically distributed, and most programs (except for Business and Distance Education) do not have doctoral programs, which mean they do not have research assistance. However, it was clear that what brought Grace to this university were her research interests (not teaching) and for her, the university was a good research site from the beginning. It is important to note that her research can be categorized as mission critical and grant-oriented, and thus more valued by the university nowadays.

She came to the university as a postdoctoral fellow in the late 2000s and only after a few months she became an assistant professor. Within three years, she was promoted to an associate professor position, which suggests that she and her works have received institutional recognition. Although I cannot make a direct comparison between these two, I could not stop thinking about James who is still an assistant professor and introduces himself as a junior member of the program even after working at the university for about 30 years. However, it seems obvious that Grace has been seen as an effective and productive member by her colleagues and institution. Other evidence for this recognition appears in the *Open* magazine published in the recent year. She and her colleague working on the same project are introduced in the featured article that represents her not as a teacher but as a researcher who leads a team of graduate and post-doctoral researchers in her program and devotes to changing “online education forever by improving students’ academic performance, reducing their study times and increasing their satisfaction with their education.” About the mission statement, her first remark was:

I did read through that a couple of time because we have a funding application, which is mission critical funding. We needed to consider that mission. So I know it quite well. I think it’s quite good. It’s well formulated and our research that we are doing is fitting also very well in that. So that’s basically it. (Grace, October 3, 2013)

She gave me the most concise and simple description about the openness principle as “providing education for everyone” and the innovation principle as “we look for innovative teaching methods that we are using.” She was also very clear about the issue of university identity, for example, she stated “we are a research university. There are four research universities in [the province]... we are one of them.” Not very surprisingly, she did not hesitate to pick the innovation principle as her personal priority. Indeed, her interview is the second shortest one (1 hour and 13 minutes) after the interview with Kevin (an effective teacher in Faculty of Humanities & Social Sciences who joined the university a year ahead of her).

She, not surprisingly, has a very positive attitude towards online education and she thinks that two importance criteria for effective online learning are interaction and critical thinking—not very different from the criteria for good face-to-face education. She explained the similarity between face-to-face learning and online learning in regards to the negative correlation between effectiveness and class size. That is, courses with fewer students tend to be more interactive and thus effective no matter whether they are online or face-to-face. However, towards the end of our conversation, she implied that online education can be a better than face-to-face education because, she said, “I think a discussion forum is something that really add value to our courses where students can discuss with each other... which is a bit missing, I think, in face-to-face learning.” That is, her perception about online education is very well matched with the dominant one in the field.

One interesting thing is that she does not have a developed understanding of print-based distance education since she has never experienced traditional distance education, specifically correspondence study. She has a somewhat limited understanding of print-based distance education as:

[W]hat I understand what this print-based learning is you are getting a textbook and you read a textbook and I think you go somewhere to make some exams and that's it, right? So it's kind of... you have no idea who else is doing the same course. There is no interaction, there is no contact to teachers or to tutors or anything. So it's kind of I would not say that as not interactive (laughing)... I don't think learning in isolation works very well... So, I think online learning a lot of advantages over printed materials. (Grace, October 3, 2013)

However she did not know that the tutoring system was part of the institution from the beginning of the correspondence programs. Tutors' roles have not changed much although their main communication medium with

students has been changed from the telephone to email. When I mentioned that there are professors who dislike online education, she was quite surprised and asked me “Really? Really? Here? Here? At [Institution A]? Interesting!” and then she laughed for a few seconds. These examples suggest that she, who is relatively new to the institution, is not very familiar with the traditional DE practices but tends to take the new form of online education for granted. Similar with Hunter, she has focused on graduate level courses more than the undergraduate courses:

[A] graduate course especially we... I am trying to have students really interact a lot with each other... I am really trying to kind of make some interaction with each other and kind of discuss a lot. For example, we have, in every unit, we have discussion forums where there is one question and they should have discussion in each week about one of those questions. So, I think that’s kind of really important when I design the course. (Grace, October 3, 2013)

When it comes to the undergraduate courses, which have a continuing enrolment and using a rigid LMS, Moodle, it becomes a totally different story. Even her pilot studies on the new adaptive and personalized LMS, which even goes well theoretically with the independent study model, have been not very easy to implement in the undergraduate courses:

[A]t our stage, it turns out it’s also very difficult to get things [LMS] in. So, for example, we have collaboration with other universities that use our developments very easily, but here, it’s very difficult to get in... because we have one central learning management systems, Moodle and that’s used for every course. So if I want to do something in my courses that this needs to go in the central Moodle system. Then we need to make sure that it’s not breaking anything and stuff like that. That makes things really complicated. so what we are doing in our pilot studies now is that we use a separate server, research server, and have our courses there. So that makes it easier and then similarly other universities are doing. If they are not online universities just go ahead, right? (Grace, October 3, 2013)

Similar to Hunter’s case, although Grace’s innovative mission critical research activities have received a lot of institutional benefits, they have yet been integrated into the actual online education practices at the institution. Nevertheless, she does not seem as frustrated as Hunter about the fact that she has been able to lead the innovation at the practical level.

Table 6.1.
Summary of Instructor Cases

Categories	Effective Instructors		Traditional Instructors		Innovative Instructors	
	Case 1: Peter	Case 2: Kevin	Case 3: James	Case 4: John	Case 5: Hunter	Case 6: Grace
Faculty/Centre	Science & Technology	Humanities & Social Sciences	Humanities & Social Sciences	Humanities & Social Sciences	Distance Education	Science & Technology
Mission statement	Positive and having a strong focus on openness	Positive and having clear and simple understandings	Positive and having a strong focus on openness	Critical about the conflicts among principles	Critical about the conflicts among principles	Positive and having clear and simple understandings
Openness: An old institutional priority having an expanded focus	Having the expanded focus - Committed	Having the expanded focus - Committed	Having the traditional focus - Committed	Having the traditional focus - Not particularly enthusiastic	Having the expanded focus - Committed	Having the expanded focus - Not particularly enthusiastic
Innovation: A new institutional priority	Positive - Committed	Positive - Not particularly enthusiastic	Critical - Not particularly enthusiastic	Critical - Not particularly enthusiastic	Positive - Committed	Positive - Committed
Online Education	Positive	Positive	Critical	Critical	Positive	Positive
Teaching - Research	Teaching	Teaching	Teaching	Teaching	Research	Research
OER Initiatives	Positive - Actively participated in	Positive - Actively participated in	No interest - Not participated in	No interest - Not participated in	Positive - Actively participated in	Positive - Actively participated in
Research Approach	Mission critical & Grant-oriented	Mission critical & Grant-oriented	Disciplinary & Private	Disciplinary & Grant-oriented	Mission critical & Grant-oriented	Mission critical & Grant-oriented
Teaching Approach	Traditional	Traditional	Traditional 1:1 Tutor-Student Interaction	Traditional 1:1 Tutor-Student Interaction	Up-to-date Group Interaction	Up-to-date Group Interaction
Group Interaction	Positive	Positive	Negative	Negative	Positive	Positive
Self-Paced Course	Positive	Positive	Positive	Positive	Negative	Negative

6.4. Conclusion and Discussion

In Chapter 4, I analyzed the institutional discourses about its mission and the principles of openness and innovation and traced the radical changes in the meanings and priorities of those principles that have been normalized and become dominant in the institution over the last two decades. In this chapter, I turned my attention from the institutional discourses to the instructors' voices—narratives in their interview transcripts—and additionally analyzed their personal understandings of those institutional principles and their influences on their praxis. The results indicate, as demonstrated in Table 6.1, that no one shares exactly the same set of understandings about the university's mission and those two principles even among those instructors categorised within the same group. Thus, it is not clear that there are consistent patterns even within the narratives of each group of instructors. Instead, each of them has very different perceptions about the institutional mission as well as the student groups with whom they work. In particular, the instructors' attitudes towards online education and pedagogical approaches to their teaching differ greatly from each other, and these differences further reflect each instructor's unique relations to the institutional mission and priorities.

Through analyzing these six interview texts, I came to the understanding that all the narratives of the six instructors are internally persuasive to their own authors (i.e. those speaking subjects who produced the narratives in the interview context). Bakhtin (1981) distinguishes authoritative discourse which is unquestionable, non-negotiable, and thus absolute, from internally persuasive discourse in which “each person thinks for himself or herself, what ultimately is persuasive to the individual” (Ball & Freeman, 2004, p. 8). The source of authority in unchallengeable authoritative discourses (e.g., disciplinary knowledge or theories) tends to be external. However, the locus of internally persuasive discourses is within the individual who interacts and responds to multiple voices of others and creates new and independent voices (Matusov, 2007; 2009; Rule, 2011).

[A]n intense interaction, a struggle with other internally persuasive discourses. Our ideological development is just such an intense struggle within us for hegemony among various available verbal and ideological points of view, approaches, directions and value. (Bakhtin, 1981, p. 345-346)

Thus we see that not only the dominant institutional discourses in the current online education regime (e.g., the expanded approach to openness) but also those less dominant discourses¹⁴ that were once most valued in the past DE regime (e.g., the traditional approach to openness) still remain as internally persuasive discourses to some members. However, in Institution A, these instructors whose pedagogical beliefs and practices are fundamentally influenced by the residual discourses tend to be negatively perceived as traditional or old-fashioned by learning designers or other members to whom the currently dominant discourses are much more persuasive. Thus, the traditional instructors' negative opinions about adopting currently popular ways of doing DE (e.g., online discussions, group projects) have been criticized and their unwillingness to accept the new norms in the online education regime has become problematized. In the case of James and John, for example, although they have their own internally persuasive positions about good pedagogy that creates these attitudes, it is clear that their positions—if not conflicting outright—are not well-aligned with the dominant academic discourses nor with the instructional norms in the current online regime. Thus, unfortunately, the considerable effort they put in to develop solid course content or to communicate with individual students via telephone is not appreciated but perceived as less effective and productive.

On the other hand, both Peter and Kevin, who were classified as effective instructors by learning designers, have very positive attitudes towards online education and its potential for increasing group interaction. However, when we closely looked at their actual pedagogical practices, their teaching paradigm seems traditional as well, despite their rhetorical support for a social constructivist approach to online education. In fact, their internally persuasive discourses are also not identical to the currently dominant academic discourses about effective online teaching, however, their voices tend to be similar to those in the learning designer group. As Chapter 5 described, learning designers have faced a wide range of difficulties with using (social) constructivist ID principles in this particular Institutional context. Thus, although the learning designers accept the new pedagogical norms based on social constructivism as legitimate or ideal, they have developed and used their own

¹⁴ I will refer to these discourses as residual discourses using Raymond Williams' (1977) notion.

pragmatic ID strategies, which are not necessarily social constructivist. In this study, not surprisingly, what makes Peter and Kevin seem more effective instructors and legitimate members of the university is that they share the internally persuasive discourses with the learning designer group and accept and follow the institutional norms in their practices.

That is, *being normal* in Institution A in the current online regime requires instructors to have a positive attitude toward the social constructivist approach to online education, to participate in mission critical and grant-oriented research, and to be excited about new trends in the field of online education such as OER initiatives. Yet one could argue that their actual teaching practices are not clearly better than those of James and John, nor their courses necessarily more effective than other courses at the institution. Thus it seems that instructors' subjectivities are not constructed exclusively by their *actual* instructional practices but more likely by their positions in relation to the dominant institutional and academic discourses, and particularly in this instructional setting where interactive or collaborative online teaching practices cannot be fully realized. I will further argue that this discursive power of dominant discourses upon its members' subjectivities, has been caused by, as well as reinforcing, the online education theory-practice gap in the open university; and that has occurred through the processes of either normalization or problematization of its members, based not on their actual practices but on their positions relative to their rhetorical discourses.

Hunter and Grace who are labelled as innovative researchers, beyond being normal, share the characteristics of being committed to mission critical research, and being effective in both securing external funding and academic publication. Both their internally persuasive discourses and practices are very well matched with the dominant institutional discourse about innovation. As a result, this distinguished group of instructors have actually received many more institutional benefits and enjoyed exceptionally supportive and convenient working conditions. This should also be seen as evidence of how the discursive power of dominant discourses can cause unequal working conditions and relationships among instructors compared to the situations of the traditional instructors—who have struggled with being problematized or criticized by other members at the university. Despite this obvious evidence of advantages and disadvantages that each group is experiencing, those traditional

instructors, however, have not simply changed their beliefs and accepted the new dominant discourses or legitimate norms in order to obtain institutional advantages. Instead, these traditional instructors in this study show clear objections to the currently popular understandings of the institutional principles and their priorities, which were accompanied by their strong resistance to the new institutional and pedagogical norms.

Foucault's (1985; 1995) works mostly observe and report the regulative (i.e., governing and controlling) power of dominant social discourses inducing people to normalize their behaviours and internalize the legitimate norms through self-disciplinary or self-correcting practices. However, we see James and John being aware of that their perspectives, constructed in the old regime of DE, are problematized in the current online education regime and yet they still maintain those perspectives. The way that these traditional instructors resist the new dominant institutional discourses and norms seems to be better explained by Bakhtin's (1981) notion of dialogue, which is an authentic process of ideological becoming. Bakhtin does not perceive individuals as governed subjects who are passively accepting (and controlled by) the dominant discourses but as speaking subjects who are actively engaged in dialogue in which multiple discourses and perspectives are co-existing and interacting with each other (Ball & Freeman, 2004). Through this dialogic process, Bakhtin suggests, each individual develops a unique ideological understanding of the self, the others, and the world, which is internally persuasive to that individual, but not necessarily persuasive to others. The Bakhtinian conceptualization of the dialogic relationship between institutional discourses and personal narratives, therefore, creates a space, in this thesis, for each interviewee to respond to the dominant discourses differently as well as for us to respond to their views in multiple different ways based on our own internally persuasive discourses.

I conclude this chapter by suggesting that the question, "Who are the effective online teachers?" is not a productive one to ask, particularly in the complex teaching context of Institution A where multiple conflicting discourses related to its mission and online education co-exist. Among these different discourses co-existing in Institution A, which one is more or less persuasive or acceptable in this particular online education setting at this historical moment or in the current regime of truth depends upon many interacting factors. Now, in Chapter 7, I will turn my attention to the struggles and resistance of each group to better understand the discursive power and

struggles in the institution which may provide us with useful insight about the discontinuities between the rhetorical discourses and actual practices in current online education.

CHAPTER 7

RESISTANCE

Resistance to Moving Online: Multiple Voices and Struggles

In this chapter I want to examine the discursive struggles among members that arose during the process of moving a print-based DE institution into an internet-based online space. Since its first online graduate programs, Master of Distance Education and Master of Business Administration, were offered in September 1994, Institution A has relatively slowly changed its print-based undergraduate programs to an online form as the interview data in the next section will demonstrate. There has been significant resistance to these ongoing technological and pedagogical changes and intense struggles among its members. According to Foucault's (1990) conceptualization of power, resistance and struggles among people are evidence that there are power relations operating in a particular social regime. Following the previous chapter that investigated the effects of discursive power on instructors' subjectification, this chapter will look into the possibilities and forms of resistance to the power relations between competing discourses (e.g., openness, innovation). Among the many voices co-existing in the institution at the moment when I conducted these interviews, I will particularly focus on my interview participants' narratives about DE and online education in order to understand the institutional relationships between groups of instructors and learning designers who had conflicting positions toward moving online.

An in-depth analysis of the power struggles between instructors and learning designers is particularly important to understand the current discrepancies between the rhetorical academic discourses about the effectiveness of online education and actual online education practices. In addition, analyzing the power-resistance relationships between instructors and learning designers at Institution A may offer useful insight about why and how such discrepancies have emerged. Seven learning designers have brought academic knowledge from the academic field of online education (or more broadly, DE) into the university and attempted to apply social constructivist instructional theories in their online course design practices. Although their theoretical understanding of what constitutes effective online course design is aligned with the prevailing academic discourse,

as analyzed in Chapter 5, learning designers' actual practices are largely influenced by their previous educational experiences and beliefs as well as limited by the particular institutional conditions. As a result, multiple conflicting voices appear even in a single learning designer's interview text, which suggests both the complexity of, and necessity for, this kind of analytic work.

How each instructor group has resisted or not resisted the technological and pedagogical changes and the theories and norms that learning designers have brought into the course design process may also facilitate our understanding of the relationship between the institutional discourses and the academic discourse. My analysis of the interview texts, a process informed by Bakhtin's dialogism (1981), pays a careful attention to less popular and often problematized voices that are not frequently presented in academic discussions as well as the relationship among multiple voices in a single text. The specific research questions in this chapter are: a) What are the struggles instructors and learning designers have experienced with the dominant discourses? and b) How has each instructor resisted, or not resisted the dominant discourses?

7.1. Overview: From Distance to Online

In this section, I will bring five instructors' voices who are not part of the case studies in Chapter 6 to provide a more elaborated description of the institutional situation and conditions during the period of moving online, which continues as an ongoing process for some members. All of them shared their thoughtful reflections upon the institutional change process to become an online university and the current status of online education in the institution. Particularly two instructors who joined the university in the mid 2000s, took administrative roles almost from the beginning of their careers at the Institution A. These two instructors in administrative leadership positions respectively represented conflicting positions of instructors and learning designers and provided a great overview of the struggles between the two groups. For the purpose of maintaining the interview participants anonymity, especially given the tension and diversity of views among the members in Institution A, I decided not to specify who provided certain information and whose interview texts I am quoting in this chapter. In order to prevent any negative consequences institutionally or making their relationships with other members more difficult,

I have altered interviewees' identities by using strategies such as changing their genders and illustrating quotes from the same person as if they are from two or three different people.

One of the interviewees, Paul, joined the institution in the 1990s reflects on the challenging nature of achieving technological innovation in Institution A:

Every single time in my experiences, someone has come along and say "we should move to more recent technology." The argument has always been "*but will that keep certain students from getting their education?*" When I started with [Institution A] and it was still a primarily print-based university... I was actually shocked because I was hired to invent [one of the programs with a heavy media focus] and so I thought "I need to use the internet. I need to use some of the newer technology" and *people were very, very resistant* even to something like discussion group because they felt some students didn't have computers and that was quite right. A lot of students didn't. So what we've always allowed, except in a last few years, we've always allowed students push us. So as soon as we had enough students saying "I like to have a discussion board" then we would lumber into movement and we get the discussion board. But with the speed of technological changes, cultural shifts, and generation shifts have been happening, the university now has to jump over several phases of technological innovation to try and catch up. *So we are in a catch-up mode now rather than being ahead.*

He continues to explain that the institution has currently faced difficult situation that it has to compete with other universities including both new online education institutions and traditional universities that have recently entered the increasingly competitive online education market. The particular difficulties of moving online experienced by traditional DE institutions compared to campus-based institutions are illustrated in the excerpt below:

[N]ow everybody sort of looks over their shoulders at us and thinking one of our problems is back to the *bureaucratic thing*... that the university became very heavily invested in certain kinds of technology, certain kind of pedagogy, and then slow to adopt as everyone went digital. And now what we have to do is not to go through all the intervening stages but to link up, drop over here... it's like turning the Queen Mary around in the middle of the ocean because the whole university's organized to work in a certain way whereas [one of the campus-based universities] was able just to start from a scratch over there and everyone else can do the same thing and *we actually have to disassemble and then reassemble and we have to do it or die.* I think everybody now realized that several of us been saying this for years.

One of the biggest obstacles to technological innovation inside the university, according to another interview participant, are people (i.e., “the old guard” in her terms) who “persistently or naively hold onto the old mythology of the open university” involving old meanings and ideas of openness and innovation:

When the university was founded the people who started this university purposely went out to find every radical thinkers they could find, they were all communists and they were all people who were living in the bush with no electricity... a bunch of rebels... they are the people who put this university together and that ethos about looking after the every man, being the ordinary person’s university, going overboard for service for students and so on. All those things are still very precious to these people... Nowadays most *the old guard*... have been either retired or on the verge of retirement... We hired whole other people around 2004, 5, 6 and they are all sort of in their late 30s and 40s so on. They are not invested in that myth. They just wanna be effective as teachers and so we are just in the middle of a massive, massive internal cultural shift along with the technological shift, pedagogical shift, everything is up for grabs.

Listening to Erin describing “the old guard”, I could not help recalling one of the traditional instructors that I met just a day before, James. In fact, James can be seen as one of the old guard that have adhered to the earlier definitions about the university’s mission, that is, a particular understanding of openness. That case will be discussed more in the next section though, according to Erin’s description, James must be perceived as one of the old guard, in other words, a resister or a rebel against technological innovation at Institution A.

Dan wrote a similar reflection in one of his recent blog entries, in which he expresses his great disappointment over the slow pace that pedagogical and technological innovations have diffused through the university. In the entry, he states that when he first came to the university in the mid 2000s, he was shocked that only around half of the courses at the university were fully online and few of the online courses were actually based on an effective model of online learning and teaching despite having globally renowned online education researchers and a solid team of learning designers and support staff. Although the situation has slightly changed for the better over the past few years, he still believes that in 2014, a surprisingly large number of courses remain based on the traditional DE model focusing on knowledge transmission from textbooks because the transition from DE to online education really occurred without significant pedagogical changes in those courses. He laments this peculiar institutional situation where new technology made no pedagogical differences while the rest of the world had made a lot more technological innovations. He also feels “strange” that there is extremely little internal

use of the innovative pedagogical and technologies that were invented by “our stunningly good researchers” who have led the development of online education theories, outside their own courses at the university.

Again, when Dan was talking about “our stunningly good researchers” one instructor immediately came to my mind was Hunter whose advanced pedagogies and technologies are remarkably little used outside his own teaching. In the same entry, he discusses the structural challenges in the university including a lack of dialogue among its distributed members and very rigid structure-oriented systems developed in the university to fill in the gap, which was similarly pointed out earlier by Paul as “the bureaucratic thing”. One of the examples that reflects this structural challenge particularly in relation to the instructor’s position is a “Fordist” course production model at the university, which is likened to an “automatic car wash” by Paul:

[It] is so highly regulated. A bit of freedom if you like, you have when you are actually writing and revising it, you are sitting here at your computer... but once it leaves your desk, it’s like you are in automatic car wash, you lost all the control. That isn’t actually the case, but it feels like that because the way it’s been stretched. Once it’s in a development side, you still have time to say “I do and I don’t want such and so” but you get told “it is possible and that’s not possible”... But I think where we feel lost control is once the course is open, it’s now a legal entity. It’s a product that the students have purchased and in a very different way from the product that students have purchased at U of T. It’s fixed whatever you wrote on that page, it’s there until you have money to revise it again, which never seems to come up often enough, and so you become sometimes embarrassed by what started up as being a good course but it’s... years later... out of date in some way or another.

Because these self-paced online courses allow students’ continuous enrolment throughout a year, it is extremely difficult for instructors to make any changes in the courses. Simply put, there are always students in different stages of their learning in the course environment and no one knows where each of them is, what they are reading, which assignment they are working on and so this way of course operation makes any sudden changes in the course materials impossible (even a reference list) once it is open and up online. The revision cycle varies among courses but an average course lifespan before a major revision process is about five years, during which one minor revision may be conducted. This course production system resembling the book publication model was not criticized when the university was print-based but rather perceived as natural and reasonable or even effective. Indeed, it is very in line with the industrial production model of one of the early DE scholars

Peters (1967) and in the previous regime of DE, it was considered as the most efficient, effective, and cost-saving model for open universities (Garrison, 2000). However, most instructors in this new online regime who I interviewed raised inefficiency and ineffectiveness of the model in relation to difficulties with this revision issue, with the interesting exception of some traditional instructors. We will discuss this in detail in the next section.

Another interviewee, Laura, also suggests the large team-based course production process as a serious problem at Institution A illustrated by two examples of her very frustrating personal experiences:

[I]t's unfavourably slow... it is ridiculously slow. And I have a course... I am a geek. I know about this thing. So when I first arrived, I created a course. It took me a month or two and basically it set. I created it on Moodle. It was there. It was ready to run pretty much... and *it sat there for three years going through the process* probably because [course production team members] were very confused because they were very expecting to receive a Microsoft Word document and converted into their standard formatting... That's frustrating... all I wanted was a slight change to the glossary and it was actually two lines of the code, I gave them precise two lines of code and told them exactly where to put them in and they would not cause any particular problem. *That took nine months*. This is not an innate problem with the technology. This is a problem with the... you have to look at it in a broader level of technology. The technology including management processes and those are problematic. That's where people feel the control taken away from them.

In this very structured course design and development process, not only instructors but also learning designers have experienced difficulties as Laura continues to say:

I think learning designers are in a difficult position now because... they might have moved [courses] onto an electronic system but essentially they are the exactly same as the traditional postal model of distance learning, which has the sorts of pedagogies... at best cognitivist, and quite often behaviourist... many of the learning designers I talked to are quite frustrated that they know *how things should be done but their hands are tied* to the very formal systems.

David also joined the university in the mid 2000s and he was mainly charged with getting the university online. When I met him in 2013 he said getting the university online was “getting the whole world to turn its head” and he was still trying to fix the issues that adhered to the traditional or industrial approach to course production. The first step he took was to change the name of the centre he was working for to one with a focus on learning design and then to change the title of the designers from Instructional Media Analyst to Learning

Designer. He also hired a number of new learning designers who would do the work of moving courses online.

Three of the seven designers I spoke with were hired around this time.

There were a lot of new articles in the literature around learning design as a methodology and as a process... and I was familiar with that literature and I thought learning design is actually what we want these people to do. We want them to be designing learning environments that are technologically facilitated... and at [a renowned campus-based university in Canada] I learned it's not about instruction but it's about learning. To change the conception of teaching from a conception of information delivery to a conception of facilitating and coaching and mentoring students to learn, you need to change your language. I just pulled out of the research and convinced the Vice President Academic at that time that that was the right term for these people.

The excerpt above suggests that these changes were guided by the emerging academic discourses at that time. In fact, his understanding of effective online teaching, which is not to simply provide knowledge but to facilitate students' own knowledge building processes, closely parallels Harasim's (2000) argument about the new role of online instructors, which was discussed in Chapter 5. However, as I earlier argued, this new perception of effective online teaching is fundamentally based on social constructivist learning theories, which are not easily applied in the instructional context of Institution A. Nevertheless, this social constructivist approach to online teaching has been largely supported by studies conducted in the context of traditional campus-based universities and has become a new pedagogical norm across the field of online education. In the same vein, although this new norm of teacher as facilitator may not be very appropriate for online instructors in Institution A, David, who had learned the effectiveness of this social constructivist teaching approach from the face-to-face educational context, brought the same norm into Institution A.

His case clearly shows how new pedagogical knowledge and norms extracted from what he calls "new articles in the literature around learning design" that generally do not reflect the unique instructional conditions of DE institutions, have been treated as legitimate and relevant knowledge in Institution A as well. Thus, I see his efforts—to change the language (i.e., the name of her centre, the title of instructional designers) as his way of transforming the old conception of teaching based on the knowledge transmission model to the new one based on the social constructivist model—as an important part of the discursive formation process. It is in this process that the dominant academic discourse about online education that states how online education is a new pedagogical

paradigm in higher education and needs to be done in a certain way, exerts its actual power upon people even in DE institutions like Institution A where the discourse itself is rather rhetorical and unconnected to actual pedagogical practices. The adoption of this new paradigm, which was not immediately appropriate for the instructional conditions of Institution A, and the strong push for the paradigmatic shift in people's pedagogical conception without making actual materialistic changes in the instructional conditions seems unproductive. However, it has certainly produced an interesting amount of discursive power as the continuing discursive struggles among the people in Institution A demonstrate.

For example, learning designers have been struggling against the institution's traditional course production system, which conflicts with what they see as an effective instructional design process. These struggles are clearly manifested in this tension between designers and editors within the same course production group. Editors seem to have been a problematized population in the group in terms of their persistence in the old ways of doing online education. Another interviewee, Pam, working closely with the course production group distinguished learning designers from editors who had been developing courses as if they were publishing books:

[T]he editors were in the print production process. The editors really managed the process. It was all about quality control and the editors liked that control. They ended up in some cases doing instructional design without the right background and making some inappropriate decisions around that. The editors are responsible for editing not design and those two processes are actually quite different... Online course development at other institutions, lots of them have learning designers and no editors, but this university... the editors have got these guidelines and standards to meet and they are all about quality of language... It did become a power struggle and it has got quite uncomfortable at some times.

Learning designers also have had conflicts with many faculty members who do not value the learning designers' expertise. Pam gives an example:

[W]hen [one professor] was told that he had to speak to a learning designer about his course instead he posted his course plan on the university's social network and asked for advice from whoever would answer him and he got answers from some of our staff including some of our editors. He got answers from other professors so he crowdsourced his course design. I don't know that all of the advice he got was appropriate. I don't know that he chose the right approach but it was a different way to get learning design than through the experts although some of the people who responded to him were definitely experts.

She then asserts that learning designers need to become consultants and work with faculty who want their help and request consultation and advice:

There are faculty who have very highly developed senses of appropriate pedagogy and technology. And imposing learning designers on them causes some further friction... [They would say] “Oh god! I have to talk to the learning designer. It is what a waste of time!”... These faculty are very difficult to work with and I think we need to concentrate our efforts on those who are willing and available and enthusiastic about teaching.

It is important to note that those faculty members who request help from the learning designers’ are seen as being more *enthusiastic* about teaching than those who do not want (or need) to work with the learning designers. It seems like that in Institution A the discursive formation of instructors’ subjectivities—who is (perceived as) a good and enthusiastic teacher—is not necessarily based on how they teach the courses but largely decided by the way that each instructor interacts with the learning designers. As Pam’s comment on the faculty who refuse the learning designers’ assistance shows, there tends to be a general sense of distrust of the faculty members’ teaching abilities among the learning designer group, because these faculty members’ pedagogical senses are often not strongly grounded in online education theories. However, this negative attitude of the learning designers towards faculty members’ pedagogical and technological understandings can be and is challenged by the fact that these faculty members’ pedagogical senses are actually well grounded in their own DE teaching experiences in the university context.

Sam who is a director of one of the programs in Institution A also talks about these conflicts between designers and instructors but from a different perspective. Regarding the difficulties that learning designers have when working with faculty members, he says:

I can understand their frustration but [learning designers] are also very frequently wrong (laughing)... Teachers learn from their experiences and they can say “ok this is a way to do”... they start in the face-to-face classroom, which almost everybody really does, they start there and sometimes spend the good part of their career there before they come into distance education. You basically call shots as to how you order the material and how you step through the materials and you are right there face-to-face in the classroom with students and you take them through and you are really able to take responsibility for that experience that your students have. So it’s very hard for faculty members to reshape that and relinquish some of that control to accommodate somebody else’s. They’ve got a lot invested in their teaching expertise. I can see how difficult that

would be to work with for learning designers whose experiences are often not coming from direct teaching or relationship with students and how students learn, but comes from ideas and theories about how students should learn.

He then spoke more for instructors:

On the face of it, I would be delighted to work with an expert in course design... in terms of pedagogical content and the way and which I have come to understand that... which has largely been in the face-to-face classroom doesn't work in the same way cause it is online... theoretically I value the idea of learning designer who is able to help think differently... about the way the material is to be presented in that context. I've been surprised to discover that it's not so easy because they bring expectations about the relationship between design and pedagogy that are at odds with my understanding of the very close relationship between content and form, the choices you make in relation to content and the way you delineate the content for the particular course... have to be taken rather carefully... I am looking at course all the time and thinking about pedagogical process and presentation all the time, and I've seen learning designers make howling mistakes about how students are perceiving and making their way into materials. Once we have, it's gonna take years to get the things changed back around to what we know in experiences, students need to work with the materials for years. This is our frustration.

Sam then argues that both instructors and learning designers should get into the same room and listen to one and another to address this problem of communication and collaboration between the two groups, however, he continues it would be very difficult if:

Learning designers say, "We have important things to say about learning design and you should listen to us. We have expertises that you need to hear." You are commanding ... and trying to control that discursive space and so that's coming right into the area of [instructors saying] "I am a teacher. It's my responsibility to design this course and teach this course in a way it's going to be effective to my discipline and effective with my students." So here you have two power or areas of responsibilities that are in conflict with one another. They are both trying to command the same space.

This overview provides a comprehensive picture of the institutional issues that arise in the process of moving towards fully online teaching, and facilitates our understanding of each instructor group's experiences of the institutional changes. In the next two sections, each group of instructors' voices will be presented and their struggles with those institutional changes will be further analyzed.

7.2. Struggles of Moving Online: Traditional Instructors and “Problematic” Voices?

Traditional instructors express relatively strong dissatisfaction with online education and working with learning designers. One of the traditional instructors, Brian first says “Everybody works hard and everybody is very professional and this is necessary for me to show respect to somebody I am working with. *I hope that they show me respect, too.*” He does not feel very respected by the learning designers that he has been working with and instead, he feels that they try to impose their pedagogical rules and norms on him:

Sometimes, the way they want me to formulate practice exercises is too mechanical, too formulaic, too behaviouristic, so *I sometimes struggle with them... I am forced to use Moodle* but... I often just make contact [with students] through regular email and I encourage them to send me their assignments just as regular attachments because Moodle is sometimes problematic. It doesn't always notify me when a student has dropped an assignment in the drop box. So I feel much better if I can communicate directly outside the Moodle [but] I am not supposed to do that and so *learning designers hate me*. Learning designers want me to put in chat rooms or conference sites. My response is I don't have time to monitor posts that students put it up... because there are three written assignments in this course and if I got 30 students in this course, I am gonna be busy with marking their written assignments, answering phone calls and emails... Plus most students, if there is no grades given, they wouldn't bother... They are not in [the course] for socialization, they are in it to get the credit to move on. *Learning designers don't like me because I am not enthusiastic about all those stuffs.*

This dense paragraph, in which he emphasizes how problematic the learning designers find his approach, effectively reveals the intensity of the existing conflicts between some of the traditional instructors and learning designers in Institution A. This interview excerpt also illustrates how learning designers, who consider their mission “to persuade faculty to buy into our idea of what learning innovation is” (Helen, October 2, 2013), had pushed Brian to change his pedagogical practices by providing him with different instructional regulations (e.g., communicating with students only through Moodle, putting chat rooms in his courses). However, these efforts made by the learning designers seemed ineffective as he continued to resist having any group communication activities in his course and said, “I still am unenthusiastic about it.” The conflicts between the traditional instructors and learning designers tend to only to worsen when learning designers try to persuade faculty to follow the new ways of teaching at distance, which look, to Brian, “too mechanical, too formulaic, too behaviouristic”. In fact, as I argued earlier, learning designers, while facing multiple difficulties with applying the (social)

constructivist ID theories in this context where the theories do not have a clean “fit”, ended up developing a pragmatic pedagogical stance and using somewhat mechanical or behaviourist design strategies, which are quite different from those that typical constructivist learning theories would suggest as effective.

Another structural limitation that hinders learning designers from making meaningful pedagogical changes in Institution A is that designers do not have access to actual online courses after they are open to students. That is, because designers are not involved in the teaching (or tutoring) phase (as described previously in Chapter 5), they cannot see either the positive effects of their design strategies nor observed the pedagogical challenges that may arise from their own suggestions they made in the design phase. These limitations make it even more challenging for the two groups, traditional instructors and learning designers to have effective conversations based on shared understandings and mutual respect for one another, as the following excerpt from the interview with another traditional instructor, Sophie, illustrates:

Learning designers have got this idealized version and a big problem is they don't teach the courses. They don't realize how much work is involved... So, I have as little to do with them as possible because I feel better if they know about my discipline and if they have to teach the courses themselves. They see themselves [as if] they possess a universal set of skills, which are transferable across the all courses. They have a template. The way I want to teach a particular course depends on the content of the course, individual characteristics of the course. Kind of students who are attracted to [my course] are very different from kind of students who try to do [a course in a different discipline]

Brian shared a similar story about learning designers' approach to course design:

The old story is to the person who invented hammer... the whole world becomes a big nail that he can use his new technology and learning designers can be like that. They think they have a set of techniques and technology and the whole world is ready for it, all the courses are ready for it. But I don't like the attitude. *It's imperialistic...* imposing inappropriate standards and formulas and not always wanting to listen... They always come in and “we want to show you and tell you all of the better possibilities in the course, chat rooms, conference sites, all the things and *then* we are happy to answer to any questions.” What I will prefer is they come in and say, “we want to listen to you. What do you want for your courses? Tell us what you need. Tell us what's going wrong. What's really good and we will tell you if we can help.” That's preferred.

Brian did not hesitate to refer the learning designers' approach as being imperialistic and insensitive to the institutional pedagogical context as well as not being communicative. So, I had to ask him what he wants for his

courses. He had a very clear pedagogical idea about what makes a good online course or good distance teaching, which may be negatively perceived as knowledge delivery by learning designers:

I think there are a lot of things I would like to do with my courses... video lectures. I actually did for undergraduate course and this working very well with audio clips as well as video clips. Students like that... I'd like to do more of them for my courses and I hope I get the time to do it... I don't have any regrets about not having chat rooms, conference sites, all the stuffs in my courses but I'd like to do it [video lectures] for other courses.

To learning designers, in fact, his version of the good courses, would be problematic since he simply wants "to translate the faculty lecturing in a face-to-face environment to the online." (Jane, September 25, 2013). What I repeatedly observed in the interviews, not only with the traditional instructors but also with other faculty members, were the conflicts between diverse pedagogical beliefs about effective instructional methods and models.

Such conflicts are not productively addressed by trying to decide whose belief is "right" and whose is "wrong." Instead, I have focused on illuminating the various positions by situating each within the larger contexts in which their beliefs developed. Max like Brian and Sophie, for instance, also points out the same issue of the learning designers' attitude. However, his struggles with the learning designers' pedagogical model (e.g., a student-centered learning model), are more deeply based on his philosophic views. His ideological views motivate his political concerns about current society and we see these concerns reflected in the following excerpt:

Learning designer comes with a bunch of norms and I have had problems with learning designers because they seem to be trained with a certain model of what the education process is supposed to be. For example, one learning designer said, the students are clients in the middle and everybody else is serving their learning needs... When I heard that I said no. That's fundamentally wrong because, first of all, the student at the center, they start to think about themselves as consumers. They pick the stuff they want and they don't pick the stuff they don't like... but the learning process requires dealing with both. And one who knows better than anybody else is the expert in the area. So I argued that what we have is the teacher-student relationship at the core... If we don't expect that then we might as well become a Wal-Mart university. It's a kind of stupid idea but the reason why this institution supports it is because it's adaptive as a business model to try to get more students... *we are losing our sense of social responsibility*. If that continues then we are gonna go into the Dark Ages. This is gonna be a bad time in society where you know the only values are counted are financial and economic values and I think we will see disaster as a result.

As an online education researcher familiar with the idea of student-centered learning, I immediately realized that the designer described in the excerpt would not mean the same thing as Max in referring to students as *clients*. The designer likely meant that we need to help students have better learning experiences by understanding their needs and accommodating these needs through course design and teaching, which is indeed in line with the original mission of DE and Institution A. However, it appeared that Max was not simply criticizing the particular instructional approach but fundamentally arguing against the dominating effects of the economic value-oriented trend and the frenetic pace of its development in higher education that some critical scholars have called the *neoliberalism' war* (Giroux, 2014). Then, I asked him about his interpretation of social responsibility and he responded that it is to educate his students as *thinkers* who can question any social values and make decisions about their own actions, taking responsibility for the results, as he elaborates in this excerpt:

Any kinds of society... talk about wanting critical and responsible citizens but they really don't want those citizens to be too critical and take own responsibilities on themselves. They want them to follow the lead of big forces, whether they would be a corporation or government. They don't really want to educate people unless they define education as highly trained people or engineers, somebody like who can produce what we need to maintain our power or to gain more power or money... However we need to educate critical individuals who are able to see when your basic values or the ways you receive the world is wrong... that's what happened to aboriginal people... if you adopt this [Western European] way of thinking uncritically then... you just go and "Yeah, aboriginal people are savaged. They need to be made civilized." They are struggling everywhere because... the western, basically capitalist, world view doesn't recognize a lot of values [in the] ways of knowing of aboriginal people because they don't contribute to the productivity... I work closely with the first nation in Ontario and we are facing this tension all the time... I struggle in trying to advise them but I am prepared to enter into that struggle... By doing what was important to me what eventually happens was that everything started to make sense so that I could make the coherent sense of what I was doing as a human being and as an academic.

His resistance to the learning designers' pedagogical model, therefore, should be read in relation to the global political context where he and many other teachers in liberal arts are struggling in support of their social mission as higher educators. These teachers in liberal arts in the current higher education context are also constantly struggling for ensuring their survival as a discipline against the rapidly growing economic pressure being exerted on them both institutionally and governmentally (described more fully in Chapter 6). The diverse positions that different instructors are in relation to the larger social and educational context demonstrate the

complex nature of the challenge for learning designers to communicate the new learning paradigm to those instructors. In short, in situations where the designers are unaware of each instructor's unique academic history and political perspective, it will never be easy for the designers to persuade those instructors who already have very articulated understandings both of their roles as teachers, and of their social critiques.

Indeed, Max's sense of social responsibility as a teacher is strongly aligned with his approach to course design and his own research. For example, he greatly values the in-depth intellectual phone conversation with individual students that push and help them to engage in thinking through social problems as a thinker, over having class discussions in which students may only share shallow and superficial thoughts with each other. Also, his major complaint about courses in Moodle is that it is "real challenge" to organize a lengthy text in a logical flow in the online format that enables student to deeply engage in a problem and think it through. Fortunately, he and his learning designer A and editor B seemed to eventually find a way that they could collaboratively address the challenge, Max continues:

That has been the case for last ten years but now I've been working with our learning designers [A and B] to try to figure out whether there are potentials of Moodle that I am not recognizing and there is one thing that seems to have some promises [A] calls lessons where students read the text and respond to the query and then... go on reading my commentary and then come back again and maybe revise... [If] we phone them and then "Have you read the materials? What would you think about this? How would you respond to [the author] when he says..." If you have to do that with every student, it will cost a fortune. So, we are trying to find a way to do that online, or at least to have some kinds of substitute for that... I don't know, yet. And in fact, we just yesterday and today, we are looking at some examples of how I might do that. It looks promising to me.

Sophie's situation shows similar disparities. She also clearly articulates her teaching practice as "I print out and go through [students' essay assignments] and make all the changes including grammar changes and then I go back to the online document and then I reinsert all these changes and I send it back". Learning designers would not consider her pedagogical strategies or interactions with students effective according to the current norms for social constructivist online teachers. However, it seems almost impossible to change her pedagogical beliefs especially considering that she has so much pride in her teaching style and strongly believes that her strategy

works best for most of her students who have serious problems with literacy although they are enrolled in university courses.

In the case of Brian, who confidently refers to himself as “a craftsman or artisan in the same way someone who used to make shoes,” he says he has been engaged in a lonely fight against the new culture of “just-in-time” course production:

I am under pressure to reduce the quality of my courses in order to increase the speed of production. That’s the problem. That’s nothing to do with students but *it has to do with a technological imperative*. The academics really should be in control of priorities involved in producing the courses and I am not sure if that’s true anymore. *Even other academics said to me* because I was involved in [a certain political] movement “Why don’t you just produce a really quick course about [the movement]?” and I said no. I know some of the literature and I’ve got YouTube presentations in the area but to write an academic course, I gotta do serious preparation and research to put them together. It can’t be done in 6 weeks. I am sorry, if that’s what you want, just-in-time, no. I can’t do it. I am not gonna buy a book and just throwing multiple choice quizzes and that’s the online course.

There are two further, emerging problems with online education, often discussed outside the dominant discourse about the pedagogical advantages of moving online, which have increased Brian’s objections to online education. These problems are the changing publication culture and increasing incidence of student plagiarism, which, he believes, should be more seriously discussed and considered as an integral part of the dominant pedagogical discourse about online education. He argues, nowadays, after the advent of e-books or e-texts, the publisher revises the textbooks too frequently. Almost every two years, they publish another edition of the book with minor revisions, which was not the case in the old days. Since it has become a lot easier to revise e-texts than paper books and in this way, the publisher and authors may increase the charges and revenue (mostly by simply editing and minor updating). Accordingly, online courses need to go through minor revisions more frequently (e.g., changing page numbers or chapter titles of textbooks) and students’ financial burdens have increased because they cannot use second-hand books anymore. In addition, he was seriously concerned about the growing issue of students’ plagiarism in current online programs, which is also a concern in general education contexts and within online education scholarship (e.g., Jocoy & Dibiase, 2006; Swan, Shen, & Schultz, 2006). Although it is not an issue exclusive to online programs, he believed that it has become a more serious problem since online access has

made it easier for students to plagiarize others' ideas and works. I got the impression that until he could get reasonable solutions to these problems, his negative attitude towards online education would not be easily changed.

Although these traditional instructors' views could be seen as stubborn and strongly resistant, throughout reading their interview texts in their shoes, I came to understand that all of them have their own good and convincing reasons for their resistance to the new dominant discourses. It was also evident that the conflicts these traditional instructors have experienced with learning designers and other members in Institution A have resulted from their own legitimate concern about their institution and students, which is mostly grounded in the traditionally dominant discourses in which they had invested most of their life time as a teacher. Nevertheless, in this new regime of online education, unfortunately, these teachers tend to be isolated and their voices tend to be ignored or less appreciated by other members in the university. Their social isolation is highlighted when Brian speaks about a theme of his current book under development as "It's very lonely, you have to do everything. Most the work I am doing is like that because I don't really have too many collegial friends. So the book is about the loneliness of the long distance teacher."

7.3. Struggles of Moving Online: Voices of the "Normal" Groups of Instructors

The case studies in Chapter 6 demonstrate that instructors who are considered as effective by learning designers and other members in Institution A have a relatively clear and simple sense of the institutional mission and priorities with a strong focus on teaching (rather than research). They are very committed to the openness principle with the expanded focus on making educational resources open and available for students online at no cost. They also have a positive attitude to online education in general and believe that it is a better form of education than traditional DE (although not necessarily better than face-to-face education). Even if those effective instructors are not particularly good at, or enthusiastic about, technological or research-based innovations, they all agree with the importance of the innovative efforts. Thus, it can be argued that their fundamental approach to online course design is well aligned with the learning designers, which has prevented any serious conflicts between the two groups. However, again, their pedagogical approach is not necessarily social constructivist, just

like the situation with the learning designers that we discussed in Chapter 5. For example, Leah argues that she knows her own students and what they would really like is a self-test:

They love that instant feedback and just try something out because they've got an exam coming up and they can go through ten questions and know what they know and what they don't. "Do they want another video of me talking?" No! (laughing). They just ask "Oh, could I have another practice exam before I take my final?" or "I don't know how to do this algebra, I know this is a [science] course but I am having a math problem, how do I do this?" I have to do maybe like the Kahn Academy. He does a very simple tutorial in a minute or two. "This is how you do it, bring the number over here, you have to remember do this or you get into trouble." boom! finish.

Leah seems to have a somewhat cognitivist or instructivist perspective about effective course design with the central idea of the instructor as knowledge provider, which is certainly not consistent with the constructivist approach to teaching. However, it was interesting that his teaching approach did not cause any conflicts with the ID approach of learning designers. Again, it suggests a gap between the theoretical frameworks of the designers and their actual approaches to online instructional design, which they referred to as pragmatic or eclectic (described further in Chapter 4). On the other hand, however, these effective instructors, similarly to the designers, highly value the potential of online education for more interactive learning although this may be difficult to realize in the context of Institution A, as another effective instructor, Tom's description about the weakness of his courses demonstrates:

I would like to see [students] have more discussion, exchange of ideas within the course. But it is always difficult for students who are studying independently. Because they don't feel themselves as a part of the classes where they are studying as a group... I think there is a tension there. Our system allows people learn independently, which gives them flexibility but at the same time, it often prevents them from interacting with other students.

So, I asked him if he had been using any strategies to address this weakness in his courses and Tom responded:

The only thing I really try to do is to stimulate the discussion by posting information and the links to the news items, things like that and I hope that might stimulate students to comment and to look into further or respond but they don't do that very often.

His response actually made me wonder whether the learning designers had tried to help him use better strategies and develop a deeper understanding about what interactive online learning looks like or how it works.

Following up again, I asked Tom to describe his relationship with the learning designers and he simply said, “I do know many learning designers have some knowledge that I don’t have and I am willing to ask questions when I need to.” Later, I realized, as discussed earlier in Chapter 5, that Tom’s efforts to increase the interactivity in his course was made not as a course writer or a subject matter expert but as a tutor, and learning designers are not involved in this tutoring phase when actual interactions with students happen and useful facilitating strategies are actually required. This structural division is another significant problem inherited from the traditional industrial production model and demonstrates the limited authority learning designers can exert to actually change the institutional pedagogy.

A major challenge for this particular institutional system is that, as Alex expressed in Chapter 5, designers do not even have access to the course that they designed or to course evaluation results. The complete division of the system into two phases of course production and teaching, therefore, may be the main factor fuelling the conflicts between instructors and learning designers. In addition, the instructor’s roles that are emphasized in (social) constructivist instructional theories are more closely connected to the tutoring phase than the design phase of course development. Overall, the constructivist instructional design models do not seem to suggest any clear guidelines, at best, they would ask learning designers to be flexible, creative, and artistic in the production phase. With that perspective in mind, it became clearer why there were multiple competing voices rather than a single unified one related to instructional design (i.e., the mixed voices of a behaviourist, a cognitivist, and a constructivist) within a single learning designer’s narratives.

No matter what happens in the tutoring phase, the effective instructors’ interactions with learning designers in the production phase seems much smoother than those of the traditional instructors. Interestingly, another effective instructor, Anna shared a somewhat opposite wish in relation to learning designers than the traditional instructors’ common wish:

I was expecting a lot more guidance and innovation but it was just like “what do you want to do?” and I was kind of looking to them for guidance like someone to say “oh... well... you know, the top six things you want to have in your course are these things because students really like or do really well. That’s what we should be doing. What do you think of it?” Instead, it was a kind of

open page “what do you want to do?” but they have had good sides, too. I can bounce ideas off like I can ask questions “ok, does this work better if I give a self-test on every unit that students could do themselves or is it better if I have multiple assignments that they hand in and get feedback?” So they can give me their thoughts on that. So it’s nice to have somebody... whereas before it was just... I could read and ask colleagues or think off on my own... although they are trying to do something like concept map and a few other things that seems like a lot of extra work... I don’t know why we are doing it... they are “well... this is a bureaucratic thing that we have to do so let’s get it done” and so I am not really clear on how this will help the course.

Despite this wish and a certain level of dissatisfaction with their interactions with designers, the effective instructor group tends to have fewer conflicts with learning designers. In addition, I could not find any explicit resistance to moving online in the interview texts of these instructors. Not only these effective instructors, but also all other interview participants who joined the university in the most recent years after the university already moved online, did not express any concerns or issues with online education and the pedagogical norms in this new regime. Most of them, instead, share a common positive belief that the university has been doing great in terms of both its openness and innovation principles—in contrast to the views of the most traditional instructors, particularly the one who expressed great regret about being unable to continue the various outreach programs (e.g., the prison program). Leah’s explanation of the evolution of online education in the university well represents this position:

At the beginning, even trying to get the idea of what does online actually mean to people was difficult. There were these initiatives to define what it means... most of that was just to get--especially the older colleagues—a little more comfortable with the idea of going online... It wasn’t until 2001 or 2002 the university actually came out... and said that our primary form of delivery is online... There was a lot of resistance and I heard people say “That’s not my job. I’ll write a course and if they wanna put it online, I will hand it over to whoever it is, they would make it online but that’s not why I am here,” and so to have people not just have their courses online but actually be tutors and instructors in an online teaching environment was very difficult. So it was a people problem, technology was easy and then maybe 7 or 8 years later we started to practically change in real ways and we had several projects. In each one of these initiatives we kind of learned a little bit more and it kind of got people discussing little bit more and so it wasn’t a complete solution but... everybody was then ready to make that transition to some degree... We are in the last stage now. Most courses and all materials have been pretty well online in one form or another and there is push to move to e-textbooks or go completely online... We [still] physically send out the materials to students and we want to get rid of that. We wanna just send out the electronic materials.

Caroline, another innovative instructor or researcher, however, does not agree with Leah's positive opinion about the current status of online education in the university. Caroline argues:

We haven't even yet made the transition to online learning from correspondence in the undergraduate programs... going online means you take this study guide and you put it in the Moodle book. It's not really that much different from [traditional print-based DE]... I think that their design and pedagogical model really stresses behaviour outcomes and the value of having content so there are a lot of readings. They are very structured and... if they have two tutors on the course they are very clear about what it takes to get A and what is B and they are trying to drive out all of the emergent stuff they think that can screw up... so their idea of quality is structurally there is no spelling mistakes. It looks nice but it is a product sealed and highly polished... I think they do very structured kind of instructional system design.

So, I asked Caroline to elaborate her idea of how undergraduate level courses in this particular institutional context could be designed effectively. She first classified DE based on its pedagogical models into three generations, which include cognitive-behaviourist, social constructivist, and connectivist pedagogy and she said:

In order to give an ideal education, I think [students] need to have exposure to all three [learning approaches] and I don't think that you can or should get a completed university degree based on connectivism or on behaviourism. I think different disciplines and different subjects need different blends.

Caroline then argued that an important role of learning designers and DE researchers (including herself) is to introduce these different approaches to online instruction and make each discipline come to understand and so develop a better blend. She believes that it would be problematic if learning designers imposed their own ideas of which one is the best or which approach should be the basis of all their undergraduate courses, "if we don't give them [students] exposure to all three, then we are doing them disservice." One thing that became clear is that Caroline, by being both a leading scholar in the academic field of online education and an innovative instructor at the online university, has a more comprehensive and deeper understanding of what is happening in both the academic field and actual education context—that is, she is aware of the instructional theory-practice gap—than the instructors in other two groups. Nevertheless, as her more conceptual or theoretical answer to my question suggests, she does not have a good solution as to how best to move the undergraduate programs online to the level that she would be satisfied with.

Another innovative instructor in this thesis, Caleb who is in the similar position with Caroline in Institution A, shared his frustration and ontological struggles with the discrepancies between his identity as a leading researcher and the institutional reality which he cannot control repeatedly appears throughout his interview text. For example when he mentions:

We [he and his colleagues in his centre] are travelling all over the world all the time doing talks on open and distance learning and so the perception is that [Institution A] must be the most innovative place and the reality is so much lower than the perception and it's a bit embarrassing in times. But what can we do? We tried to turn this ship around that we haven't been yet able to do.

He also pointed out the biggest problem at Institution A is a lack of leadership:

A lack of leadership is the biggest reason and no sense of necessity their pedagogy has to change... we haven't had a president or vice-president or somebody who can say, this is the way we were in past and now we are moving some place different so the few initiative instead comes mostly in our graduate programs and mostly in the paced programs where the faculty members are more in individual control. So we can crank out in same or repeated fashion in undergraduate programs.

However, in another part of his interview text, Caleb says:

It's because in some ways I've sat on the outside criticizing instead of being the chair or being a dean or running for vice-president. I've never done any of those things and I probably could have done more leadership and more administration kind of things but I am too lazy or whatever.

This peculiar position of his subjectivity in relation to online education between being an active producer of (or a contributor to) the idealized rhetorical academic discourses (and theories of online education) and a passive observer of the problematic (or at least atheoretical) online design and teaching practices in his own institution has also produced a large amount of inner conflict. As described in Chapter 6, the experiences of one of the innovative researchers with promoting the new learning environment in the university also implies this group of instructors own struggles—not as explicit as those of the traditional instructors though—with learning designers as “I've gone to learning designers three different times asking them to build *New Platform* into their undergraduate courses. They don't do it and learning designers blame the faculty, the faculty blame the learning designers and everyone blames the deans and students.”

Another part of Caroline' interview reveals that her belief about the institutional mission and identity as a leader of online education has also caused some friction with other faculty members:

The other faculty get tired of me saying it but [we have] to become the world leaders in online learning research and they say “Oh... you just want everyone to start what you are interested in. Why don't you study Shakespeare like I do?” [but] this is what we are supposed to be about. We are not a Shakespeare university but we are in distance education so “Are we a university that just happens to be teaching at distance or are we a distance education university?” and that debate is going on here for long ever since I've been here and I get afraid of even mentioning that because I know some people will take it like I am insulting their discipline or I don't have high regard for them as researchers or scholars or something like that, I just want everyone to be in my position or my disciplines. But I think we could and some ways we are.

We can also hear the voice of the other faculty who “get tired of” these innovative researchers saying that in the interview text of Sophie in the traditional instructor group, below:

There are certain individuals who seem to think the primary focus of research at [Institution A] should be mission critical. We should all be spending more time focusing on research into post-secondary education and also distance learning. I don't believe they have too many teaching responsibilities so they've got all the time and awards to develop mission critical research... So there is a kind of tension between those people who feel the most important research is mission critical and those of us who are doing other types of research.

It looks, on the surface, like a debate over the value of mission critical research versus disciplinary research or a tension between academics in the field of DE and those in other disciplines. As we discussed earlier (in Chapter 6), traditional instructors in Institution A tend to be very positive about the university's mission statement and some of them have been actually committed to achieving the openness principles (in the traditional sense of mission of *open* university: opening the door of higher education to the underserved). On the other hand, the popular understanding of the university mission among the instructors in the innovative researcher group is more in line with the currently dominant discourses of openness and innovation and some of them are actually less enthusiastic about the mission statement because of the potential conflicts among the four principles at the operational level. Instead, they certainly believe that as a leading *online* university, doing good online education is the mission of Institution A and it can be effectively and fully achieved only by doing good online education research.

That is, although the words in the university's mission statement have remained the same, how its members understand the institutional mission has changed and diversified. Specifically, traditional instructors do not consider online education as the institutional mission while all normalized instructors both in the effective instructor group and in the innovative researcher group in this study have participated in different mission critical and grant-oriented research projects. This also demonstrates how the dominant new discourses about the institutional mission are inclining to innovation. In sum, Some of the innovative researchers' struggles with other faculty members being offended by their emphasis on mission critical research can be better understood within the discursive power-resistance framework. For better communication, They may have to know what other faculty understand by the mission and construct a shared understanding of what the university's mission is before talking about mission critical research.

7.4. Conclusion and Discussion

Before summarizing the results of my discourse analysis project in the next chapter, I believe, it is worth using this space to discuss two possible responses of listeners to the faculty members' self-descriptive or self-reported struggles in this chapter. Firstly, as we can see from Erin's explanation below, instructors' narratives can be perceived as the meaningless or never-ending complaints that most teachers commonly have:

[T]eachers are always complaining. It doesn't matter it is a grade 3 teacher or a university teacher. We always complain "we don't have enough time, we don't have enough support from the executives." This whole little package of complaints that teachers will give you and if you look at the literature, you will probably find it. People have written papers about it. We have complained, "too much technology is introduced too fast, I haven't got time to learn all these stuff. Ba-ba-ba-ba-ba." But it doesn't make any difference if you are introducing tele-teaching or television or whether it's Internet. Teachers are gonna complain a lot about it. We are always the later adopters for technology, always (laughing).

I would agree with this response if Institution A had successfully transformed into the online university without much conflict among its members and if the actual status of online education closely resembled the rhetorical discourses about online education. However, this is certainly not the case for Institution A and most of the members that I talked to believe that things should not be the way they are now. Also, as we already saw in previous chapters, there have been growing discrepancies between our theoretical expectations in the academic

field and their actual online education practices. Therefore, I will argue that we need to take instructors' multiple voices more seriously in order to understand where and why problems have arisen. I will further argue that the discrepancies between the rhetorical academic discourses and the actual online education practices will deepen and become more dysfunctional if we do not listen to these voices, even when they contradict our own views, carefully and re-examine our theoretical expectations.

In fact, surprisingly, faculty resistance to online education (or similar technologically-mediated pedagogical innovations) has not been a main analytic focus of research in higher education (Khalil, 2013), although it features more prominently in K-12 research (e.g., Bingimlas, 2009; Blin & Munro, 2008). Instead, it has been discussed as one of the negative factors or barriers to adoption of online education in higher education institutions except for a few studies that actually analyze multiple factors that influence faculty resistance to online education (e.g., Berge & Muilenburg, 2001; Harvey & Broyles, 2010). Most of these factor analysis studies have utilized quantitative research methods with a large set of survey data (e.g., Chen, 2009; Green, Alejandro, & Brown, 2009; Keengwe, Kidd, & Kyei-Blankson, 2009; Li & Lindner, 2007; Oomen-Early & Murphy, 2009; Tabata & Johnsrud, 2008; Wang & Wang, 2009). There are at least three shared aspects among all these studies that limit their usefulness.

Firstly, their approach is often too simple or deterministic, for example, Chen (2009) suggests there are two categories of barrier factors to adoption of online education including the program cost factors (e.g., program development costs, equipment maintaining costs) and the faculty participation factors (e.g., faculty workload, lack of faculty interest, lack of faculty incentives). Wang and Wang (2009) developed one of the most sophisticated acceptance models of web-based learning systems and provide eight factors that predict instructor's adoption. The factors include information quality, system quality, service quality, perceived usefulness, perceived ease of use, subjective norms, intention to use, and self-efficacy. Nevertheless, those factors do not seem to capture the complexity of instructors' struggles and resistance as analyzed in this chapter.

Secondly, most authors suggest several strategies for increasing faculty participation in online teaching such as providing professional development programs and incentives and involving faculty in the adoption process as key players. However, there is little discussion about difficulties or struggles that the participant faculty might experience when teaching online (Choi & Park, 2006). Instead, most online education researchers have exclusively focused on making faculty adopt or accept online technologies for their teaching. Even the few researchers concerned with instructors' difficulties participating in online education initiatives do not provide in-depth explanations about the nature of these difficulties but rather focus on how to solve them. For instance, Howell, Saba, Lindsay, and Williams (2004) propose seven strategies for university administrators to mitigate faculty concerns and ensure program success. These, similar to other studies, include enabling individual departments to accept more responsibility for leading the change, providing strong incentives for faculty to participate in distance teaching, improving training and instructional support for faculty, and building a stronger faculty community and online scholarship and research. However, there have been ongoing conflicts and struggles in Institution A where those strategies have been already utilized for years, which suggests the necessity of deeper discussion and a deeper approach to the issues.

The last but the most disturbing aspect is that many educational studies that deal with faculty (or teacher) resistance to online education tend to be fundamentally based on a strong technological and economic imperative. These educational researchers (e.g., Fullan, 1993) who are influenced by economists (e.g., Rogers, 2003; Senge, 1990) have had a strong assumption about change and innovation as necessary for organizational success and survival, which itself produces an often oppressive effect on the instructors within those organizations. Consequently, they often simply problematize the faculty resistance and approach to it as a troublesome issue that needs to be eliminated. For example, Rogers (2003) in his book *Diffusion of Innovations* classifies individuals in social institutions based on their innovativeness into innovators, early adopters, early majority, late majority and laggards. He specifically categorizes the late majority group, who are sceptical about innovation, as people likely having below average social status and little financial liquidity. The laggards are described as often having an aversion to change agents and this group is seen as socially isolated, traditional and having the lowest social status

and financial liquidity of the categories. However, this human classification scheme does not seem a helpful approach to improve the situation but might instead exacerbate tensions between different groups.

The ways Erin problematizes the group of traditional instructors, who she earlier labelled as the “old guard”, and simply treats their voices as complaints is consistent with much popular educational, social and economical discourses about innovation and resistance. This perception is also commonly observed in online education literatures, therefore, the voices of the faculty members, particularly the traditional instructors’ voices, in this chapter might be also considered in that way. However, I want to take up Sam’s interpretation about these voices, another possible listener response, which is described in the excerpt below:

This profession as a whole, but especially for tenured faculty members who can claim the full privileges of tenure and academic freedom, [liberty to speak frankly] comes along with it. Also one of the strong qualities is [Institution A’s] social mission and its political awareness... a *strong political social sense of mission*, it’s quite marked in the distance education environment compared to the face-to-face environment so that academic freedom is highly valued for that reason in particular. So liberty to speak frankly about their values and their political investments is taken very seriously by my colleagues here... they are well disposed to being aware of ideological forces and speaking their minds and *not being regulated by ideological pressures*.

In this chapter I looked into the possibilities and forms of resistance to the power relations between competing institutional discourses about its mission and operational principles in Institution A and learned that there are still many strong forms of resistance to online education (as well as new instructional theories and norms). The university has already been more or less moved to an online space and all instructors have actually been teaching online for years. However, although they have accepted technological changes whether it was their own will or not, there is still continuing resistance of instructors to pedagogical changes. It is clearly manifested in their relationships with learning designers and it has created various forms of struggles between the two groups who occupy different regimes of truth about effective distance course design and teaching.

The learning designer group, theoretically or conceptually, engaged in the dominant academic discourse about online education as a new learning paradigm, have been striving for the circulation of new constructivist teaching norms through the course production process. At the same time, however, they have also been struggling with the institutional system and culture which does not allow them to create constructivist instructional designs.

Additionally, if one examines their own prior educational experiences as learners, designers, or classroom teachers in different contexts, they actually hold somewhat traditional (behaviourist or cognitivist) perceptions and approaches to ID, contrasting with their constructivist work principles. These inconsistencies among their own pedagogical knowledge, perceptions, and practices seem to decrease the clarity, consistency, and strength of their argument about online course design strategies.

On the other hand, most instructors have much more specific and strong pedagogical ideas about effective ways of teaching their disciplinary knowledge and interacting with typical students in their courses, which do not fall into the clear categories of learning theories. Except for a few effective instructors, the large majority of personal pedagogical norms often conflict with those of the designers. In particular, the instructors in the *problematized* group have their own teaching norms which are not simply based on their teaching experience but are more largely influenced by their political and ideological disposition. For example, the two cases of traditional instructors in Chapter 6, James “continues in an uphill *struggle to align* his personal practice with his political theory” and John says, “by doing what was important to me what eventually happens was that everything started to make sense so that I could *make coherent sense* of what I was doing as a human being and as an academic”. That is, for James and John, the ways they design their courses and teach their students (and also conduct research) are closely related to their ontological stances as an academic in the current society. This indicates that it would be very difficult for the learning designers to change those pedagogical practices deeply rooted in their ontological beliefs by simply distributing the new norms and rules for online instructors.

Thus it appears that simplistic and deterministic approaches to the adoption of online education common in the current literatures are not very constructive ways to mitigate the tension between those traditional instructors and the learning designers in Institution A. These limited approaches include a) analyzing discrete barrier factors to the adoption of online education and remove the barrier factors, b) treating the adoption of online education as a matter of individual instructors’ choice and facilitate instructor’s decision to teach online, and c) emphasizing pedagogical changes based on a technological and economic imperative and problematizing those who resist the changes. I would argue that these approaches have rather increased the tension among stakeholders

in this particular open university educational context while reducing the possibility of a more open and dialogic conversation among the various stakeholders.

In addition, this ongoing tension may further intensify the instructional theory-practice gap in the open university. In fact, many of the institutional and social conditions that learning designers mentioned as problems that prevent them from successfully conducting constructivist ID practices in Institution A (described in detail in Chapter 5) are analogous to the issues raised by the traditional instructors. For example, both groups are very concerned about the heavy institutional (or administrative) emphasis on economic principles (e.g., cost-effectiveness) over concerns of pedagogical effectiveness. Both groups see this as decreasing the quality of teaching while attempting to increase the level of the institutional reputation for research-based innovation, and having too rigid and bureaucratic working procedures that do not allow its members to be more autonomous and effective. To some extent, therefore, the major causes of this tension resemble the critical factors that have caused the growing theory-practice gap in this university. It can be further argued that a dialogic conversation between the two groups in which multiple internally persuasive discourses—not a single authoritative discourse—can interact with each other and collaboratively produce alternative discourses to the dominant institutional and academic discourses, might actually be able to reduce the gap.

In short, the complexity of faculty resistance has been somewhat ignored by many online education researchers. However, this chapter shows that faculty resistance to pedagogical innovations in their online courses has continued in the open university and the pedagogical struggles with moving online among its members are much more complex than indicated by the ways these issues are studied in many online education literature. In particular, the pedagogical struggles that traditional instructors have experienced with moving and teaching online in this particular pedagogical context need to be understood as their discursive struggles with dominant social or educational discourses located in a more comprehensive picture of social and institutional contexts. While the tensions between the designers and the traditional instructors seem unresolvable, this chapter also suggests that there are some fundamental similarities and shared perspectives in the voices of the two groups, which may enable them to potentially collaborate with each other for more effective and democratic online education practices. I will argue that the first step for this potential collaboration is to fully understand each other. Therefore, we, as a collective group of online educators including learning designers and researchers, need to have in-depth conversations with those instructors whose voices tend to be upsetting and sometimes offensive and carefully listen to their voices that emerge from the liberty to speak frankly about their values and their political positions.

CHAPTER 8

CONCLUSION

What has been Learned: A History of [Discourses of] Online Education in Open University

8.1. Overview of Study

Originally motivated by my own experiences of the instructional theory-practice gap in online education as an instructional designer, my thesis study focused on analysing the reasons behind this gap. In the higher education context, it is commonly expected that adopting online education will enhance accessibility to university education as well as the quality of learning and teaching. However, the growing instructional theory-practice gap, that is, the discrepancies between the conceptual understanding of effective online instruction and the actual quality of online instruction, indicates that these claims are largely rhetorical rather than being descriptive of the actual status quo of online higher education. I have started from a position that conducting research is necessarily a political activity and my political agenda for this study is to question the rhetoric by critically examining our current understandings (or expectations) of online education. Through this analysis I have presented a different understanding of the actual state of online higher education, which may assist in building a foundation for actually increasing accessibility to university education through a more realistic analysis of the theory and practice (and the conflicts) actually being implemented in online education.

Consistent with this view, this study takes up Levin's (2007) notion of "authentic" accessibility, and defines "increasing accessibility" as providing learning opportunities to the "have-nots" (i.e., the previously underserved population) and accommodates the special needs of those students rather than supporting only the "haves" who already possess access to university education (p. 1). This study fundamentally assumes that one of the shared goals among many online and distance educators—and the original purpose of DE and its scholarship—is to increase this authentic accessibility. Therefore, I believe that conducting an in-depth analysis of the instructional theory-practice gap in online education with the political concern of increasing authentic accessibility to university education is a very important task for the field. This study also foregrounded the

instructional theory-practice gap in a particular online education institution, Canada's open university, while locating this gap within a broader context of online education research and practices where significant discrepancies exist between the rhetorical discourses of online education (about its accessibility or quality) and the actual state of online education. For example, instead of simply accepting the currently popular constructivist instructional theories as something legitimate, I considered this particular pedagogical approach as one historical discursive product in the disciplinary field of online education, which provided me with an unique approach to studying the theory-practice gap in online education.

8.1.1. Asking Questions

Selwyn (2010) urges researchers concerned with understanding educational technologies to move towards investigating “state-of-the-actual” as opposed to “state-of-the-art” questions. He provides exemplary state-of-the-actual questions that may broaden our understanding about educational technologies like: “What is the use of technology in educational settings actually like? Why is technology use in educational settings the way it is? What are the consequences of what happens with technologies in educational settings?” (p. 70). Even though I agreed with his call and decided to ask the state-of-the-actual questions, it was a most challenging task to come up with good research questions. Also, I wanted to ensure that my research was not restricted to finding and describing the gaps between the state-of-the-art and the state-of-actual in online education. In other words, I wanted to ask questions of the nature of the second and the third questions of Selwyn's above—“why are online education practices in a particular institutional setting the way they are?” and “what are the consequences of what happens with online education practices in the institutional setting?”

Indeed, it is not very difficult to find gaps between constructivist instructional theory and actual design of a particular online course and judge whether the course is good or bad or effective or not. When we (online education researchers and educators as a collective group) find the gaps, we usually analyze contextual limitations or barriers to the high quality of practices and then either put in more effort to improve the practices by removing the barriers or choose a pragmatic (often atheoretical) approach to changing the practices. The quality or validity of constructivist theories, on the other hand, are rarely questioned or critically examined beyond issues of

practicality or applicability in specific educational situations. In this context, a large number of online education practitioners have been experiencing the discontinuities between what they learn to do from instructional theories (or training programs) and what they do, or have to do—as I experienced when leading online course development projects at my previous company, and learning designers experienced in Institution A. Borrowing one of the designers’ expressions, it is almost like “learned helplessness” (Helen, October 2, 2013) that designers who have a constructivist pedagogical view have faced in an institutional situation where they cannot design truly constructivist online courses and so they have adapted to the way they need to design courses, yet at the same time, they do not think that these modified practices are effective.

Nevertheless, there are also continuing beliefs that adopting advanced information communication technologies (ICTs) will close the gap and enable us to realize the pedagogical effectiveness of online education, which is superior to both traditional DE and face-to-face education. This belief has further produced an imperative to adopt ICTs and online education across all education sectors. I was actually fascinated by our persistent trust in and expectation of the effectiveness of online education to increase both educational accessibility and quality despite the continuing gap in current online education contexts. Therefore, this persistent pursuit of adopting online education and the difficulty of criticizing the pursuit became my research focus. Both Foucault’s (1972) concept of *discourse* and Kuhn’s (1970) notion of *paradigm* provided valuable insights about what theory is, how it is constructed, how it becomes legitimated, and why it is difficult to subvert. Collectively, these insights enabled me to form my research questions and delineate this thesis project. Particularly, taking up Foucault’s notion of discourse, I shifted my research subject from the instructional theory-practice gap to the discourse-reality relationships across the academic field of online education and the actual site for online education practices. In other words, by following the way Foucault asks questions to study particular social discourses and their relationships with people’s lives and practices, I was able to explore what is happening underneath the theory-practice gap in online education.

8.1.2. Literature Review and Research Design

While I was aware of significant discontinuities between discourses and realities in online education mainly based on my own, as well as many of my colleagues', experiences of the gap between common academic perspectives and actual instructional design practices, I needed to build a comprehensive contextual understanding of this study which I chose to do by searching for the historical origin of our current perceptions about online education (i.e., openness and innovation) in the evolution of distance education (DE). Given that the original DE scholarship emerged in university settings concerning *non-traditional* adult learners (Black, 2013), I narrowed my review scope to the higher education (broadly adult and lifelong education) context. Thus, I conducted a historical literature review focusing on the two general, often taken-for-granted discourses about the old DE which are that, a) DE *opens* the door of higher education to the underserved students and that, b) technological *innovation* leads pedagogical *innovation* in DE.

My analysis suggested that the first discourse originated from the democratic purpose of early DE programs and the open learning movement of the 1960s-70s. This original concern of DE about the underserved populations (e.g., women, blue-collar workers, farmers, soldiers) by conventional campus-based universities seems to have never been seriously questioned throughout the history of DE until now. Early DE programs had utilized an independent correspondence study model in order to provide accessible (both physically and financially) post-secondary learning experiences to non-traditional students regardless of their previous educational level. These non-traditional students are frequently depicted as internally motivated and self-regulated adults, with other responsibilities or as coming from disadvantaged backgrounds. The openness of DE had been continuously promoted as the nature of DE.

In order to improve the instructional quality of the correspondence programs, different technological media (e.g., telephone and TV-radio) had been always used in many DE institutions. However, the second discourse about the relationship between technological innovation and pedagogical innovation in DE came into the center of academic discussions along with the advent and development of Internet technologies during the 1990s-2000s. Around this time, the constructivist approach to learning had been gaining popularity in general education contexts. Up to that time, DE had been perceived as a second-tier education system that was inferior to

face-to-face education. Instructional theories in DE had been developed independently from the evolution of general educational theories because of the unique characteristics of DE in terms of its instructional media, target student groups, and essential principles (e.g., efficiency, flexibility, cost-effectiveness). However, the adoption of Internet technologies as instructional media, which may enable group communication to happen at anytime, anywhere, and by anyone at low cost, was considered as revolutionary innovation in DE practices. This is where constructivist learning theory began to inform the pedagogical discussions in the field of DE about the effectiveness of Internet-based DE and the desirable design and teaching behaviours in online education. In more recent years, the openness discourse has become more taken-for-granted through the proliferation of Internet users and their participation in online communication and an increasing number of open education initiatives based on the argument about open nature of Internet space (i.e., OER and MOOC initiatives).

However, there have been other discourses that conflict with these two dominant ones as well. Although these conflicting voices are relatively few and scattered throughout the field, these critical voices together strongly suggest the discourses are indeed rhetorical ones, rather than accurately representing the reality of online education. Firstly, I was able to find sufficient evidence that supports my own online course design experiences. Despite the high expectation about Internet technologies as a revolutionary solution for the pedagogical innovation in DE, a large number of current online programs still use earlier DE theories focusing more on accessible (and flexible) learning strategies than those of interactive or collaborative learning. Previous research also suggests that while interactive learning, flexible access, and cost effectiveness are all important dimensions of effective online education, it is impossible to achieve all the three at once (Kanuka & Brooks, 2010).

In addition, previous studies demonstrated that simply providing open access to post-secondary education (or educational materials) would not guarantee students' academic success in their online education programs. The actual characteristics of current online learners are not the same as the traditional portrait of DE students who were perceived as internally motivated self-regulated adults. Furthermore, given that the non-traditional students from relatively disadvantaged backgrounds tend to be lacking in fundamental academic skills (e.g., literacy)—these students are likely to experience more difficulty while learning at a distance from the teacher. In fact, a great

number of online learners are struggling with maintaining their learning motivation, regulating their learning processes, and completing their courses as the ongoing documented drop-out rate from online courses attests (e.g., Park & Choi, 2009; Willging & Johnson, 2009). Also, many adult learners tend to prefer flexible (and individual) learning to collaborative (and group) learning due to multiple responsibilities in their personal lives beyond being an active learner.

In conclusion, my literature review suggests that our current understandings about online education have fundamentally originated in the old DE discourses, which were rather rhetorical than being accurate. Compared to those old discourses, which exclusively influenced the DE context, however, the rhetorical power of the new online discourse (that online education increases both accessibility and the quality of post-secondary education) tends to be much greater given the current ubiquity of online higher education. Therefore, I decided to carefully analyze the online education discourses including both a) their historical evolution and b) their discursive power upon peoples' lives and practices in an actual disciplinary institution: an open university in Canada. The reading of Foucault and Bakhtin enabled me to design and conduct this historical discourse analysis project, detailed in my method chapter titled “*A Study of the History of [Discourses of] Online Education: Subjects, Questions, and Procedures*” (see Chapter 3). Particularly, four of the important concepts in Foucault’s works and his two research methods were useful to structure this study and organize the findings, which will be also summarized below in the same flow (Table 8.1).

Table 8.1
The organization of study findings

	Chapter 4	Chapter 5	Chapter 6	Chapter 7
Theme	Discourse	Knowledge	Power	Resistance
Focus	Archeological Research Questions		Genealogical Research Questions	
Title	From Distance to Online: A Historical Evolution of Openness and	From Rhetoric to Doctrine: Is Online Education Really a New Learning	Subjectification of Instructor: Who are the Effective Online Teachers?	Resistance to Moving Online: Multiple Voices and Struggles

	Innovation in Open University	Paradigm in Higher Education?		
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8.2. Study Findings

8.2.1. A Historical Evolution of Openness and Innovation in Open University

After observing the disjunction between rhetorical discourses and actual practices of online education in the global academic context of higher education, I moved to the local site of this study, a Canada’s open university, Institution A. I perceived this disciplinary institution as a historical site of the institutional discourses of openness and innovation as well as an interconnected space of rhetorical academic discourse and actual pedagogical practices. According to Foucault, discourse is producing and exerting its power by regulating and institutionalizing people’s thinking and behaving in a disciplinary institution (Foucault, 1990). However, previous Foucauldian discourse analysis projects in education (e.g., Comber, 1997) also suggest that global discourses in public documents are not always the same as local discourses in individual schools—although the local discourses are not entirely independent from but are heavily influenced by the global ones.

In Chapter 4, I analyzed the historical evolution of two dominant discourses, openness and innovation, in Institution A in relation to its institutional mission and the relationships between them. Analyzing the institutional history enabled me to see both the accidental and the deliberate nature of their emergence. In DE literatures, the establishment of Institution A is often described as the successful outcome of the carefully planned democratic effort of government to empower politically, economically, and educationally disadvantaged groups. In reality, however, it was more likely directed by government’s efforts to reduce its budget for higher education while increasing national economic competitiveness as well as satisfying the growing public desire for post-secondary education. DE was perceived as the best (affordable) solution for all these issues. At the same time, Institution A adopted an open admission policy not only to provide access to higher education for the underserved but (mainly) to increase enrolments in its programs and so to assure its institutional position in the existing higher education system. That is, for both government and institution, the global (social and educational) discourse related to the

openness of DE was useful to pursue their own aims. In other words, the emergence of openness as its mandate in Institution A was neither purposeful nor accidental considering the broader social and political conditions that enabled its inception.

During the regime of DE, the local (institutional) discourses about the two principles, openness and innovation, were actually very similar to the academic discourses. Until the mid-90s, each discourse had represented a relatively simple principle that operated coherently throughout institutional practices including both educational and administrative activities. In the early years of the university, the relationship between the two discourses was also very explicit and cooperative because the institutional priority (and its members' priority) between the two principles was incontestably openness. The two discourses were also compatible with other *administrative* principles—I use this term in contrast to *educational* principles—such as efficiency and cost-effectiveness of course production and flexibility of course operation. However, since the mid-90s multiple external factors have collectively influenced the relationship between the two principles in Institution A—for example, financial difficulties mostly caused by reduced government support; growing popularity of the educational use of online technologies; and increasing competition among DE providers including newly established online institutions and residential universities beginning to offer online courses.

These external factors have also encouraged Institution A to change their institutional identity from a DE university (or open university) to an online university. In recent years, since the institution has become an online university, its central focus has radically shifted from openness to innovation. Pursuing technologically-mediated pedagogical innovation and research-based knowledge innovation has become increasingly valued in the university, particularly when such an approach produces needed revenue. Raising faculty members' research profiles has become a central institutional concern and is discussed and positively acknowledged in institutional documents overshadowing discussions focused on improving teaching practices. At the same time, the focus on the institutions original social mission, to provide accessible education for students underserved by traditional face-to-face universities has become less central. Although “openness” certainly remains one of the two dominant discourses and repeatedly appears in institutional documents and its members' narratives, my research reveals that

the discourse of “openness” tends to represent a more rhetorical claim about the open university’s mission than a materialized reality of online education in Institution A.

In this context, although these two discourses of openness and innovation in the current online regime may possibly co-exist at the ideological or conceptual level, achieving both has been challenging—if not impossible—at the operational level in Institution A. There are two possible scenarios of conflict between the two discourses at the operational level. Firstly, innovative courses are usually not as open as the traditional (or less innovative) courses. If a course is utilizing certain technology, to which not everyone has access—although it may improve the pedagogical quality of the course—it unavoidably prevents those without access from participating in the course, and at the same time, increases the cost of the courses. Those people who would be disadvantaged by this innovation, therefore, are more likely the student group that is already socially, educationally, and economically disadvantaged as well as the group that is also underserved by other universities. Secondly, many faculty members who focus on knowledge innovation in their own disciplinary fields (or other profit-oriented projects) are often less enthusiastic about or do not have enough time or resources for modifying their teaching practices. These observations indicate that pursuing innovation in this institutional setting may, in fact, both impede its openness, which was its original social mandate, as well as reducing the quality of educational services in Institution A.

The discontinuities between the rhetorical discourses and actual practices of online education, which I surveyed earlier in the global academic context through my literature review, are even more vividly manifested in the local site of this study. In the open university, there are multiple co-existing institutional discourses including the ones that were once popular and dominant in the traditional DE context (e.g., openness) as well as the ones that are now popular and valued in this new regime of online education (e.g., innovation). It became clear that the emergence of new dominant discourses does not necessarily lead to the removal of the old ones. The strong presence of the openness discourse in the current university context can be explained by borrowing one of the

useful notions of a renowned cultural theorist Raymond Williams (1997), that of the “residual”¹⁵. That is, the openness principle has remained as the residual discourse, which is less dominant than the innovation principle in the current institutional context yet, this residual discourse continues to influence its members’ perspectives and practices. In Institution A, as in any other cultural context, there are both the emergent and residual discourses that are continuously interacting with each other and consequently producing unique institutional conditions and relationships among its members. There are always people who value the residual more than the emergent and it necessarily causes ongoing conflicts among members, which also clearly appear in Institution A as discussed in detail in Chapter 7.

8.2.2. Is Online Education Really a New Learning Paradigm in Higher Education?

With a better conceptualization of the historical development of dominant institutional discourses in Institution A, I then reviewed the global discourses in the academic field of online higher education. By conducting an in-depth analysis of one popular academic text published around the time when online education scholarship emerged and began to rapidly grow in the DE field, I investigated one of the dominant academic discourses: *Online education has shifted a fundamental learning paradigm in higher education* (Harasim, 2000). The paradigm shift discourse in Harasim’s text consisted of three statements, which were closely connected to disciplinary knowledge and norms perceived as legitimate in the online education field. The three statement included the idea that online education is accessible and democratic, that effective online learning is (should be) collaborative and interactive, and online instructors become (should be) less of a knowledge provider and learners are (should be) more active and responsible in knowledge construction. The new legitimate knowledge and norms about what counts as an effective online education practices that were produced under the paradigm shift discourse could be described generally as a social constructivist approach to online education.

¹⁵ “The residual” refers to the discourse(s) that had been effectively constructed in the past, yet that are still strongly present in today’s discourses

In 2013, more than a decade after the emergence of the paradigm shift discourse, however, it was obvious that the learning paradigm has yet to be shifted in Institution A. The teaching and design practices in Institution A were still mainly regulated by traditional norms in the DE regime such as the independent study model and the industrial production model. Furthermore, the paradigmatic shift in people's pedagogical perspectives and practices to (social) constructivism seems very difficult to achieve given the specific institutional and instructional conditions of online education in Institution A. In this context, learning designers' courses design practices were also rather traditional (non-constructivist) and they were certainly aware of the limitations of the paradigm shift claims and the difficulty of applying the social constructivist instructional theories within their design context.

Paradoxically, however, learning designers were deeply immersed in the paradigm shift discourse and they repeatedly shared social constructivist ways of teaching and learning as a legitimate and right approach to doing online education during the interviews. Thus, learning designers were also striving to circulate the social constructivist learning theories even though these theories were unsuitable for their institution in certain ways, rather than ignoring or questioning them. Regardless of what they actually do in their daily practices, they were, in fact, actively playing a role in bringing the new academic knowledge and norms into the university as change agents in charge of moving the university online. All these discrepancies between the theoretical norms and the institutional conditions (i.e., between the new norms and the old practices) and between their knowledge and practices seem to have produced conflict among members and even within the personal narratives of individual designers. These conflicts, I argued, have become the major force of ultimately creating and reinforcing the instructional theory-practice gap in online education.

Through this in-depth text analysis, I fundamentally tried to understand how the dominant discourse about online education as a new paradigm is rhetorical, in other words, how a rhetorical discourse could emerge and dominate our beliefs even if it does not accurately reflect reality. Despite the prevalence of the paradigm shift discourse as well as the effort of the learning designers, it was argued that the subsequently produced knowledge is not actually in place in Institution A. Therefore, I turned my focus on the way Harasim (2000) made her

argument and which evidence or logic supported her argument. There are at least four different factors that have enabled this rhetorical discourse to develop and become popular in the field of online education.

Firstly, this paradigm shift discourse is based on the progressive understanding of the positive relationships between technological development and social or educational innovations, which has its philosophical roots in technological determinism and instrumentalism. Therefore, without careful consideration of the diverse contextual (social and cultural) forces that also influence online education practices, online education researchers generally (or naively) assume the potential of Internet technologies would be realized in pedagogical situations. And this deterministic expectation of technologically-mediated pedagogical innovation seems have further produced the technological imperative in education as well as provoked the discursive power of rhetorical innovation.

Secondly, the growing acceptance of (social) constructivism with a limited understanding of its epistemological origins and its practical (or simplistic) applications in learning and design theories has also facilitated the development of this paradigm shift discourse. Regardless of the complicated philosophical debate between original constructivists and objectivists (or among constructivists), the way that it has been taken up in the field of online education (and in general educational contexts, see Phillips, 1995) has produced dichotomous norms such as “constructivist teaching is good” and “behaviourist (or cognitivist) teaching is bad”. This *non-constructivist* understanding of constructivism also has exacerbated the gap between the constructive instructional theories and the traditional ways of doing online education that have largely remained in Institution A as dominant practices.

In addition, the growth of neoliberal ideas in higher education (as well as the Western society broadly) has provided other social and educational discourses (e.g., the knowledge economy, an emphasis on lifelong learning) that effectively support imperative ideas of online education. These claims were most recently validated by being applied in experimental online learning environments largely situated within traditional face-to-face university contexts rather than the open university context. Further, these studies are often research-oriented course designs

or pilot tests of new environments, which do not necessarily reflect broader online practices. When such studies were validated by positive research results based on mostly quantitative and positivist analyses of large empirical data sets, they became regarded as a theory or body of knowledge.

In conclusion, the disjunct between theories and practices of online education that exists in Institution A reveals how rhetoric and its discursive power shapes, circulates in, and is resisted by people's perceptions and behaviors. This research points towards the implications and risks of taken-for-granted assumptions that often render us unable to see the limitations of such naturalized assumptions. This point returns us to the conceptual framework I have borrowed from Foucault to help conduct my analysis. In order to develop a more refined understanding of the rhetoric about how online education as a new learning paradigm has become a doctrine both academically and in practice in Institution A, I referred to Foucault's (1990) explanation of how dominant social discourses exert disciplinary power upon people. Discourse in this study was defined as a collective group of utterances and statements about a particular subject or object that have certain influences on the way that people act and think (Mills, 1997). Foucault emphasizes the important role of disciplinary knowledge in this discourse-power relationship and suggests that there is no power effect produced by discourses without such a knowledge apparatus.

To Foucault (1980), among multiple competing discourses in a particular social regime, the dominant ones that consist of authorized statements, produce a regime of truth that further decides which knowledge, thoughts, and behaviours are legitimate and which are not. In other words, dominant discourses have more regulative power and effects upon people because they produce disciplinary or academic knowledge that is generally considered truth. As a result, legitimate knowledge creates and circulates certain norms into a disciplinary institution and further influences the development of institutional regulations. This Foucauldian conceptual approach to the reciprocal relationship between discourse and knowledge effectively illustrates the discursive power that the paradigm shift rhetoric produces when it becomes a dominant academic discourse and the social constructivist statements about online education become taken-for-granted assumptions. Consequently,

a series of (social) constructivist learning theories, ID models and teaching strategies are produced in the academic context and circulated in different online education institutions including Institution A.

However, in this open university, there are other dominant discourses related to administrative principles such as efficiency, flexibility and cost-effectiveness, which are not very compatible with this social constructivist way of doing online education. Further, these dominant institutional discourses are producing certain pedagogical conditions that make the learning paradigm difficult to shift even after the university adopts online education and Internet technologies. Unfortunately, the dominant academic discourse, compared to the institutional ones, tends to exert less discursive power upon people's perspectives and practices, which eventually creates the instructional theory-practice gap in the university.

8.2.3. Who are the Effective Online Teachers?

The ultimate focus of Foucault's discourse analysis was to reveal the knowledge-power relation within institutions and how it produces unnecessarily unequal working or living conditions among its members (Foucault, 1991). This revelation may "contribute to changing certain things in people's ways of perceiving and doing things" (ibid., p. 83). To analyze the invisible but complex power relations, I took up Foucault's notion of subjectification referring to a process of constructing human subjectivity that involves both normalization and problematization of certain ways of thinking, talking, and acting (Foucault, 1995). Current online instructional theories clearly suggest that the online teacher should be less of a knowledge provider and more of a learning facilitator. Given the prevalence of the constructivist pedagogical approach in the online learning field, the question "who are the effective online teachers?" may look so obvious that it can be easily answered. Those constructivist teachers who effectively facilitate learners' knowledge construction rather than transmitting their knowledge and imposing it upon learners are by definition, the effective teachers.

However, as I already discussed above, the pedagogical context in my local site (similar with many other online education contexts) did not support the realization of constructivist teaching and learning. Unlike Harasim's proclamation that the learning paradigm has been shifted, Institution A courses were still largely based

on older models. In particular, those at the undergraduate level remained as Wedemeyer's (1981) self-paced independent study process that was used for the traditional DE programs, focusing on increasing accessibility and flexibility rather than concerns about interactivity. In addition, the industrial DE production model (Peters, 1967) mainly concerned with the efficiency and cost-effectiveness principles utilizing industrial techniques such as division of labour, mechanization, mass production, and economies of scale, was still maintained.

One of the chief characteristics of online teaching at the university resulted from the division of labour technique of the production model where teachers' roles are divided into separate activities; a) course production: content preparation, design, and development and b) course teaching or tutoring. These two course production phases are completely disconnected from one another. Specifically, learning designers are mostly engaged in the course production phase and yet they do not have even access to the course teaching phase. On the other hand, faculty members who produce a course may not be teaching the course by themselves so the course may contain elements they did not include themselves. At times, the university hires contract subject matter experts who write course content and contract tutors who interact with students and support their learning experiences. Although it may reduce the cost of course production and teaching, this institutional structure makes it even harder for learning designers to effectively collaborate with these groups of non-regular contract academics, who mostly do not have a physical presence in the institution.

These pedagogical conditions in Institution A inevitably created the theory-practice gap and further made the academic discourse rhetorical. This situation also tended to create different understandings about what teaching means to different members of the university. For example, for learning designers and other course team members, effective teaching was largely defined through the design of online courses whereas faculty members who served as a course tutor tended to perceive teaching as interacting with students (mostly one-on-one communications using email or telephone). If the norms based on constructivist learning theory do not really work in this particular educational context, how do we possibly arrive at the shared answer to the question "who are the effective online teachers?" Nevertheless, these norms have still facilitated the emergence of different categories of instructors' subjectivities which were either normalized or problematized and so I asked questions differently such

as “who are perceived as effective instructors at the university and why?” and “who are perceived as ineffective instructors at the university and why?” In Chapter 6, the answers to these questions are explored through my analysis of the interview with the six instructors who fall into three different categories (i.e., traditional, effective, and innovative instructors).

The results suggest that dominant discourse at the university in regard to its central mission of innovation in the current online education regime, has produced unique institutional norms about good academics that are not necessarily related to their pedagogical practices. Being innovative, which is institutionally defined as pursuing innovation (i.e., conducting mission critical and grant-oriented research) has become the most salient norm. At first glance, the constructivist norms for online teaching appear similar to the institutional norms but the two sets of norms are actually essentially different from one another. Nevertheless, the constructivist instructional norms have been distorted supporting the dissemination and implementation of the institutional norms in order to be innovative. For instance, academics who are perceived as effective teachers tend to favor online education in general and be positive about online group interaction no matter how they design courses and interact with students. By contrast, those instructors who have a relatively negative attitude toward online education and adopting group interactions in their courses, whatever the reason, tend to be problematized as traditional or old-fashioned (i.e., ineffective) instructors and be criticized for not following up-to-date instructional methods and the social mandate. However, in reality where constructivist theories are not supported by both university and provincial government, there are no significant differences between the teaching practices of the two groups of instructors.

Instead, it seems like that all of them have their own beliefs and convictions about good teaching and all of their pedagogical understandings make perfect sense within their own frames of reference. Nevertheless, if their frames of reference are not aligned with the dominant discourse, both their perceptions and practices are likely to be considered as abnormal and needing to be corrected. On the other hand, the normalized group of instructors, particularly those who are recognized as innovative instructors mainly because of their high productivity in mission critical and grant-oriented research practices, are more likely to receive different

institutional benefits such as promotion, lower teaching load, and greater recognition. That is, I want to argue that the new theories and norms produced under the dominant academic discourse have been unexpectedly (but effectively) serving the dominant institutional discourse by producing a sophisticated mechanism of problematizing certain frames of reference of effective teaching rather than improving the quality of pedagogical practices in the online university. In other words, our theoretical assumption about effective online teachers may unintentionally facilitate the unequal power effects of the dominant discourses.

8.2.4. Multiple Voices and Struggles

I interpreted the conflicts among members as evidence of the coexistence of multiple discourses in Institution A, not only co-existing, but also interacting (and competing) with one another and carving relationships among its members. This way of understanding struggles also provided me with the insight that not only the dominant discourses but also the less dominant or less popular discourses exert their own discursive power upon people's perceptions and behaviours. This situation produces continuing dissension among its members who are holding different discourses. Of course, this is not a problem that is exclusively observed in Institution A as there are always power struggles between multiple discourses in any society.

A detailed illustration of multiple voices and struggles in Institution A is provided in Chapter 7 at some length and so here, I want to focus on the possibilities of dialogue between learning designers and instructors instead of reiterating my findings. In terms of the relationships between instructors and learning designers at Institution A what was striking to me the most was that they are not able to communicate with each other although both groups want to be effective and good at their work roles, which are intended to be complementary to one another. For example, I saw strong dedication from traditional instructors to be good teachers and they also have a strong personal belief about how to teach and interact with their students effectively, which seems to be fundamentally rooted in their understanding of what the university is (should be) doing. Based on their own pedagogical beliefs, they have constructed a rather negative understanding about online education as something may disrupt their teaching practices that they have established and perceived as effective for long time. Although both a technological determinist view and technological imperative that raise expectations unrealistically about

the effectiveness of online education are problematic, these instructors' pessimistic understandings are also limiting.

In this context, one of the most important roles of learning designers is to show instructors different aspects of online education that do not necessarily conflict with their ways of teaching but may actually increase the effectiveness of their practices. However, this collaboration between two parties would not be able to happen without learning designers also being open to different discourses in the heteroglossic site of their institution. Moreover, they may also need to be willing to experience *perspective transformation* processes (Mezirow, 2000) while being engaged in different discourses because the way that instructors want to use Internet technologies and to design their online courses may be very different from common definitions of what makes effective online courses. For instance, some of them may not want to have group discussions in their courses but instead want to enhance teacher and student interactions or provide learning aid to a certain group of students lacking in essential academic skills for university-level education. Also, facing unexpected institutional constraints and addressing them may result in transformative learning experiences in which designers can alter their knowledge and theories from the academic field and develop more realistic ones (Campbell, Schwier, & Kenny, 2007).

To open up this dialogue engaging multiple voices and navigating competing discourses, there are three important tasks that we—not only learning designers but researchers—may need to undertake prior to the dialogue. Firstly, we need to be aware of the messy discontinuities in our own voice since we as historical and social beings, have been immersed different and often conflicting social and educational discourses ourselves. Being trained as a learning designer who performed constructivist design practices does not necessarily transform one's pedagogical beliefs that have been established for long time while being in different disciplinary institutions and in other pedagogical regimes—behaviourism or cognitivism—as a learner. Indeed, the learning designers' interview texts were more heteroglossic than those of instructors who have constructed a more coherent and clear pedagogical belief based on their teaching experiences. Secondly, we need to be more critical about the current dominant academic discourses and knowledge about online education, particularly about the constructivist instructional theories rather than blindly accepting them as legitimate truth. One of the most effective ways to be

critical, I believe, is to examine the origin of the discourse and knowledge and understand the social and political conditions or motivations behind their emergence in the field as I did in this thesis study. This deeper understanding of ourselves including the history of our pedagogical perspectives—beyond simply perceiving the contextual limitations as the cause of the theory-practice gap—will actually make us more aware and be liberated from the constraints. This may also enable us to develop a more coherent and realistic voice about online education which is not only internally persuasive but also convincing to other people who hold different voices.

Lastly, we need to be also aware of the possibly oppressive power of our constructivist online education knowledge and norms on certain groups of people and the unintended consequences of our research and practices both in the higher education field more broadly and in a local disciplinary institution (this will be discussed more in the conclusion below). The effort to be engaged in discursive power struggles that instructors have experienced with online education, particularly as they moved from a traditional DE university to an online university, has provided a meaningful opportunity to listen to these voices which do not often appear in literatures. In most cases, their voices were as persuasive as mine. As Bakhtin (1981) suggests we only know ourself by interacting with others outside our space because only through these interactions, we can draw the contours of our space and see where we are and who we are. Indeed, listening to instructors has enhanced my understanding of learning designers and our own struggles in the specific institutional setting as well. In conclusion, I will argue that we need to be a “constructivist” in terms of a more fundamental epistemological stance (as opposed to objectivist or determinist) not a “constructivist learning theorist” with a technological or pedagogical deterministic view who believes that moving online must involve improving DE practices and disposing of old DE practices.

8.3. Conclusion

I want to conclude this thesis by briefly sharing the most important lesson that I have learned through this research project. Mostly importantly, I learned our passionate—often more likely naive or blind—dedication to online education research and practices can actually have an unexpected negative effect on higher education and people who we want to serve or who we think we are serving. I believe that many of us are dedicated researchers, educators, and practitioners to social justice to some extent trying to increase educational accessibility and quality

for non-traditional students. As the dominant discourses in our field demonstrate, most of us assume and believe that we are doing something beneficial to the underserved in current unequal social and educational systems. Particularly, those of us working as instructional designers in actual fields are diligently striving to make changes at different levels. Researchers have observed that instructional designers are playing active roles in the transformation of learning systems in higher education as change agents and activating diverse change at interpersonal, professional, institutional and societal levels (Campbell, Schwier, & Kenny, 2007). In this sense, instructional design should not be considered as technical work but as moral and political work.

Thus, instructional designers often face different ethical challenges and dilemmas between their personal values (or conviction) and institutional expectations and may navigate or address these conflicts based on their ethical stances and higher values such as serving the underserved. However, on the other hand, if we do not have the clear ethical stances, it could be more challenging to deal with those ethical dilemmas lie within the institutional structures that we are a small part of. This situation is problematic in at least two perspectives. Firstly, in this case, we are likely to experience continuing struggles with the discontinuities between the academic discourse and the local discourse about online education as well as instructional design theories and practices. This confuses us with conflicting messages about who we are and what we should and could do. Our professional lives and institutional experiences may be troubled by a fractured identity as a change agent who does not have autonomy or authority to actually activate any change. Many times, even making change in our own practice of a single course design is almost impossible—not only because of the rigid course production system in our institutions but also because we fail to persuade faculty to buy into our ways of doing online design and teaching. This can be very disempowering and oppressive experience to some of us—at least it was to me.

Secondly, we may even worsen these situations when we do not see the complexity of the dilemmas but take a too simplistic or unsophisticated approach to the issues, which are deeply embedded in an unequal social and educational structure. While analyzing the discursive power of the dominant academic discourses about online education within the big picture of higher education, I was able to see the profound impact of our research practices and outcomes on both institutional processes and practices of an open university. In particular, a

complex mechanism was identified of how dominant discourse exerts potentially oppressive power against a certain group of people by producing and circulating a set of disciplinary knowledge in the university. Although the paradigm shift discourse in the field was rather rhetorical than an accurate representation of the reality of online education, it has entered into Institution A. There, it has been taken up and used as supporting discourse for the other social, political, and economic discourses—largely based on neoliberal ideas of higher education (Giroux, 2014)—that have collectively guided the university’s direction and shaped diverse changes in peoples’ perceptions and practices in the university.

For instance, the statements such as “online education is democratic and accessible” certainly have provided administrators (and other stakeholders) with the rationale for moving the university to online—more recently, for being exclusively an online university by removing telephone-tutoring and print-based course options. Fundamentally, this kind of statement about online education has enabled the innovation discourse to be a dominant institutional principle by increasing taken-for-grantedness of openness of the university’s services. Together with the innovation discourse, the constructivist pedagogical theories, as discussed in the previous section, have produced the unique institutional norms for its academics to be innovative researchers who produce institutional revenue rather than being dedicated teachers striving for authentic accessibility for students to post-secondary learning experiences. In this new regime of online education, those who resist the new norms have experienced the oppressive power effects that consequently create unequal working conditions and power relationships among the academics in Institution A.

Going back to the central aim of my thesis inquiry, therefore, it is important for us to critically examine our current understandings of online education. My findings demonstrate—unlike the rhetorical discourses that simply promote online education as the ultimate solution for current educational problems, particularly ones related to inequality and justice issues—the uncritical adoption of online education actually causes various other problems, struggles, and oppressive power relationships in the higher education context. Furthermore, it seems like online education has neither actually increased accessibility nor the quality of post-secondary instruction. Boldly arguing for online education—even in the open university—in this neoliberal political and economic

regime seems to have been serving the neoliberal agenda for higher education rather than the underserved students or the public good. Although the rhetoric about its accessibility has tactfully hid its non-democratic purpose and economic-oriented operation mechanism, there are parallel neoliberal trends in both online education and other higher education contexts.

For example, Levin's (2007) study on the recent changes in community colleges from the latter part of the 1990s, suggests surprisingly similar findings to this study. His explanation of neoliberalism in the higher education context and the conflict of justice and neoliberalism in community colleges closely resembles the ethical dilemmas between openness and innovation discussed in this study. It can be also argued that the evolution of online education has been influenced and facilitated by the rapidly growing neoliberalism ideology and policy. Multiple facets of neoliberalism are clearly observed in online education contexts including the reduction of government support for the public sectors, commodification (or marketization) of pedagogical activities, intensified global competition, technological and economic imperative and growing value on for-profit innovation (see more in Canaan & Shumar, 2008; Giroux, 2014; Lewis, 2008; Selwyn, 2013). In this context, it will be getting more and more difficult to achieve our original democratic mission to open the door of higher education for the underserved if we continue to uncritically accept the doctrinal rhetoric of online education and diligently try to do more effective online education based on the doctrine.

8.4. Potential Implications of This Study

There are three potential implications of my thesis study for online education (and broadly for higher education and teacher education). Conceptually, I hope that my argument here can open up more critical discussions in the field about our taken-for-granted assumptions of online education. In particular, our deterministic perception about the history of DE as linear technological or pedagogical evolution and the advent of online education as a revolutionary event that shifted that paradigm needs to be questioned. I also hope that we can critically re-examine our imperative approach to the adoption of new technologically-mediated pedagogical innovation in education, which has been misused for other political purposes and has produced unexpected results in online higher education contexts. I want to call for our collective efforts to construct a more sophisticated

conceptualization of online education that recognizes it as a complex and multifaceted social practice involving multiple groups of peoples with different and often conflicting interests and purposes.

Pedagogically, I hope that my arguments and some of my participants' voices enable us to question our universalistic perspective on good pedagogy for online education and to accept a more organic approach to online learning and teaching. This is particularly important given the rapidly growing uptake of online education not only in DE settings but also in traditional face-to-face educational settings across the educational spectrum, which means the increasing diversity of our learner characteristics and their learning contexts. In the same vein, I hope that my thesis provides online education researchers and practitioners with an in-depth explanation of how online education practices developed in this particular open university context and fresh ideas of good pedagogy for this specific educational context. This insight can be further useful for teacher educators and our colleagues who are engaged in teacher or faculty professional development practices. I also hope that my thesis work can contribute to the development of more dialogical, respectful, and constructivist professional development practices in online education that actively engage multiple instructors' voices particularly including marginalized voices, like those of the problematized instructor groups.

Methodologically, as a beginning reader of Foucault I took a bold step to use his complex and challenging concepts and took the risk of misusing or oversimplifying them. Despite the potential risk, I enjoyed working with Foucauldian ideas about discourse, knowledge, power and resistance, which have been rarely been taken up in the field of online education before this. Guided by Foucault's research approach, I was able to ask my research questions differently, search for the answers differently and find different answers to these questions from many other studies concerning the same issue of the growing theory-practice gap in online education. This particular approach certainly helped me deepen my analysis while sharpening my focus. In this thesis, I paid a particular attention to provide a detailed explanation of my understanding of Foucault and my rationale for choosing this as my methodological lens, as well as how I utilized this lens complemented by Bakhtin's dialogism. This was not only for readers to understand my work better but also to encourage some of them who are unfamiliar with any philosophy or sociology theory but interested in using this type of new lens for better understanding their

educational contexts. Thus, I hope this thesis can expand our methodological landscape in the field of online education and simultaneously encourage my colleagues to take a bold step, as I did, to use more diverse conceptual, philosophical, and sociological concepts to enrich the discussions in our field.

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APPENDIX A

[Invitation Email to Instructors]

Dear Professor _____

Hello. This is Kyungmee Lee, a PhD candidate at OISE, University of Toronto.

I am conducting a research, investigating how different discourses in the field of distance education have been developed and have affected teaching and instructional design practices at an open university. I aim to understand how instructors perceive their distance teaching experiences through institutional transformation and contribute to the institutional changes.

Now, I am recruiting research participants who are the experienced instructors

- having diverse teaching experiences using different instructional modes of distance learning
- being open-minded to share your experiences and thoughts of teaching distance courses
- being interested in better understanding of complex relations of distance education in higher educational settings

Through the purposive convenience (or snowball) sampling, you are highly recommended as a good research participant meeting all criteria described above, by [the title and name have been removed] who is a host of this research project or by other interview participants at [Institution A]. Thus, I am inviting you to participate in this research project. You will be asked to attend one (or two) semi-structured interview, which is no longer than 90mins each and to provide your course materials for review.

If you wish to participate, please simply respond to this email stating your decision of participation. Then, I will contact you again to set up the first interview schedule, which will take place in October 2013, and will provide more information about the research and conditions of participation.

Thank you. I will look forward to hearing from you soon.

Regards,

Kyungmee Lee

[An Informed Consent Letter for Instructors]

Teaching Experiences of Distance Courses in Higher Education

Introducing the researcher:

My name is Kyungmee Lee. I am a PhD candidate at the Ontario Institute for Studies in Education, University of Toronto. I had been also working as an instructional designer in both higher education and corporate training settings. I am conducting a thesis research “critical discourse studies on online learning at open universities,” exploring the dominant discourses related to online learning in higher education (e.g. discourses of openness, excellence, and innovation) and their influences on the members’ practices at open universities. Particularly, I am interested in how those discourses have been conflicting but working together to change the nature of distance learning practices.

Background to this research:

Higher education has experienced a rapid expansion along with the growth of distance learning. In particular, the development of online learning has accelerated the expansion of higher education and has changed the nature of distance learning practices. The aim of this thesis research is to provide a more comprehensive understanding of current online learning discourses and practices within a specific educational context. Therefore, I want to investigate how instructional designers and researchers have constructed their understanding about online learning and distance (or often open) education through their own design and research experiences in a higher educational context.

Participation details:

You will be asked i) to complete a semi-structured interview, which will be less than 90 mins in length, and ii) to choose the online courses that you have taught to discuss.

- During the semi-structured individual interview, you can give your answers to the open-ended questions, which will be sent to you by email at least two days in advance of interview.
- I will be audio recording the interview.
- According to your preference, the interview will take place either on [Institution A] campus or online. using a communication tool.
- You will be asked to sign this informed consent letter and choose your courses before starting the interview.

Conditions of participation:

- Your name will not appear in any reports or publications of this research. Any reports or publications from this study will be emailed to you.
- You are free to opt out of this study at any stage prior to publication of the results without any prejudice or consequence.
- Audio files will be downloaded from the recording device on the day of recording and will be stored in an encrypted format on my personal laptop. All collected data will be destroyed after five years.

Participant consent:

I have had the nature of the research study explained to me by the researcher (Kyungmee Lee) and have had an opportunity to ask further questions. I am happy to participate in the interview and to permit the researcher to access my courses or research outcomes for this project.

I am a willing participant in this study.

Signature: _____

Date: _____

If you have any further questions or concerns about this research please contact me via email:
hi.kmlee@gmail.com or **416-509-8846**.

If you would prefer to speak with the research supervisor, you may contact Professor Clare Brett via email:
clare.brett@utoronto.ca

If you have any questions about your rights as a participant in this research please contact the Office of Research Ethics at **ethics.review@utoronto.ca** or **416-946-3273**.

APPENDIX C

[An Interview Questionnaire for Instructors]

1. Overview

[Institution A], Canada's Open University, is dedicated to the removal of **barriers** that restrict access to and **success** in university-level study and to increasing **equality** of educational opportunity for **adult learners** worldwide ... Our approach to post-secondary education is based on four key principles: **excellence, openness, flexibility and innovation** (2013).

- a. What do you think about the passage above? Do you have any comments?
- b. How do you understand the meanings of those words highlighted in the passage?
- c. Could you tell me about yourself? How and why did you end up being here at [Institution A]?

2. Perceptions about online learning

- a. What do you think about online learning? In what significant ways does this method differ from other learning methods (e.g. face-to-face learning or print/television/computer-based learning)?
- b. What are the criteria for effective online learning? Why do you think so?
- c. How and why has online learning expanded in the higher educational context (and at [Institution A])?

3. Experiences of teaching online courses (Please give me your course names)

- a. Please describe your online course teaching experiences and practices at [Institution A] in order? (e.g. course design-course development-course management- course evaluation)
- b. How is online teaching different from other forms of teaching? Are there things you do differently or similarly?
- c. What kinds of behaviors are expected from students in online courses? How do you evaluate student learning in online courses?

4. Reflections on online teaching experiences

- a. Please think back to your response to the last few questions. Why do you think you are teaching in the ways you described?
- b. Do you think students have meaningful learning experiences in your online courses? Can you explain the reasons for your answer?
- c. Are you satisfied with your online course teaching? What are you most and least satisfied with your courses?

5. Additional thoughts

- a. What do you see as the important next step for [Institution A] as an open university?

- b. What do you think about current trends in the higher educational context such as MOOCs or OER? How have those movements influenced [Institution A]?
- c. Do you have any additional comments or questions that you would like to share?

APPENDIX D

[Invitation Email to Instructional Designers]

Dear _____

Hello. This is Kyungmee Lee, a PhD candidate at OISE, University of Toronto.

I am conducting a research, investigating how different discourses in the field of distance education have been developed and have affected teaching and instructional design practices at an open university. I aim to understand how instructional designers perceive their design experiences of distance courses through institutional transformation and contribute to the institutional changes.

Now, I am recruiting research participants who are the experienced instructional designers

- having diverse design experiences based on different instructional modes of distance learning
- being open-minded to share your experiences and thoughts of distance course design
- being interested in better understanding of complex relations of distance education in higher educational settings
- being able to attend an interview taking place at [the name of the centre has been removed] on [Institution A] campus

Through the purposive convenience sampling, you are highly recommended as a good research participant meeting all criteria described above, by [the title and name have been removed] who is a host of this research project at [Institution A]. Thus, I am inviting you to participate in this research project. You will be asked to attend one (or two) semi-structured interviews, which are no longer than 90 minutes each and to provide your course materials for review.

If you wish to participate, please simply respond to this email stating your decision of participation. Then, I will contact you again to set up the first interview schedule, which will take place in October 2013, and will provide more information about the research and conditions of participation.

Thank you. I will look forward to hearing from you soon.

Regards,

Kyungmee Lee

[Informed Consent Letter for Instructional Designers]

Instructional Design Experiences of Distance Courses in Higher Education

Introducing the researcher:

My name is Kyungmee Lee. I am a PhD candidate at the Ontario Institute for Studies in Education, University of Toronto. I had been also working as an instructional designer in both higher education and corporate training settings. I am conducting a thesis research “critical discourse studies on online learning at open universities,” exploring the dominant discourses related to online learning in higher education (e.g. discourses of openness, excellence, and innovation) and their influences on the members’ practices at open universities. Particularly, I am interested in how those discourses have been conflicting but working together to change the nature of distance learning practices.

Background to this research:

Higher education has experienced a rapid expansion along with the growth of distance learning. In particular, the development of online learning has accelerated the expansion of higher education and has changed the nature of distance learning practices. The aim of this thesis research is to provide a more comprehensive understanding of current online learning discourses and practices within a specific educational context. Therefore, I want to investigate how instructional designers and researchers have constructed their understanding about online learning and distance (or often open) education through their own design and research experiences in a higher educational context.

Participation details:

You will be asked i) to complete a semi-structured interview, which will be less than 90 mins in length, and ii) to choose the online courses that you have designed to discuss.

- During the semi-structured individual interview, you can give your answers to the open-ended questions, which will be sent to you by email at least two days in advance of interview.
- I will be audio recording the interview.
- According to your preference, the interview will take place either on [Institution A] campus or online. using a communication tool.
- You will be asked to sign this informed consent letter and choose your courses before starting the interview.

Conditions of participation:

- Your name will not appear in any reports or publications of this research. Any reports or publications from this study will be emailed to you.
- You are free to opt out of this study at any stage prior to publication of the results without any prejudice or consequence.
- Audio files will be downloaded from the recording device on the day of recording and will be stored in an encrypted format on my personal laptop. All collected data will be destroyed after five years.

Participant consent:

I have had the nature of the research study explained to me by the researcher (Kyungmee Lee) and have had an opportunity to ask further questions. I am happy to participate in the interview and to permit the researcher to access my courses or research outcomes for this project.

I am a willing participant in this study.

Signature: _____

Date: _____

If you have any further questions or concerns about this research please contact me via email:
hi.kmlee@gmail.com or **416-509-8846**.

If you would prefer to speak with the research supervisor, you may contact Professor Clare Brett via email:
clare.brett@utoronto.ca

If you have any questions about your rights as a participant in this research please contact the Office of Research Ethics at **ethics.review@utoronto.ca** or **416-946-3273**.

APPENDIX F

[An Interview Questionnaire for Learning Designers]

1. Overview

[Institution A], Canada's Open University, is dedicated to the removal of **barriers** that restrict access to and **success** in university-level study and to increasing **equality** of educational opportunity for **adult learners** worldwide ... Our approach to post-secondary education is based on four key principles: **excellence, openness, flexibility and innovation** (2013).

- a. What do you think about the passage above? Do you have any comments?
- b. How do you understand the meanings of those words highlighted in the passage?
- c. Could you tell me about yourself? How and why did you end up being here at [Institution A]?

2. Perceptions about online learning

- a. What do you think about online learning? In what significant ways does this method differ from other learning methods (e.g. face-to-face learning or print/television/computer-based learning)?
- b. What are the criteria for effective online learning? Why do you think so?
- c. How and why has online learning expanded in the higher educational context (and at [Institution A])?

3. Experiences of online course design (Please give me the course names you designed.)

- a. Please describe your online course design experiences and practices at [Institution A]? What are your roles at [Institution A]?
- b. How is online course design different from other course design? Are there things you do differently or similarly?
- c. What kinds of learning behaviors are expected from students in online courses? How do you evaluate student learning in online courses?

4. Reflections on online course design experiences

- a. Please think back to your response to the last few questions. Why do you think you design the courses in the ways you described?
- b. Do you think students have meaningful learning experiences in your online courses? Can you explain the reasons for your answer?
- c. Are you satisfied with your online course design? What are you most and least satisfied with your practices?

5. Additional thoughts

- a. What do you see as the important next step for [Institution A] as an open university?

- b. What do you think about current trends in the higher educational context such as MOOCs or OER? How have those movements influenced [Institution A]?
- c. Do you have any additional comments or questions that you would like to share?