

The Role of the E-facilitator

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Abstract

This paper deals with a 'Critical evaluation of the role of an e-facilitator' on three levels. The experiential description and theoretical part draw heavily on the experience of Virtual Tutor Course of Henley Management College that the author participated in. They address the role of the e-facilitator in the context of the processes and design of e-facilitation. The difference between face to face facilitation of international teams and e-facilitation will be discussed in the light of two classic models of group development. Finally the paper will focus on the stress that was experienced during the course by the VTC teams. The question is posed whether this tension is an artefact of the unknown technology or whether it is an intrinsic part of the job of the e-facilitator? The paper concludes that the stress is due to the overwhelm of having to manage and deal with unknown and sometimes failing technology together with learning new process roles that might not have been part of the work before. An overwhelm effect is identified which indicates the need for the e-facilitator to pay extra attention to the socialisation phase of participants who experience too many new things. This distress has to be channelled and mitigated first by the e-facilitator and eventually by the e-team.

1. Introduction

With more and more businesses working abroad, international or intercontinental many team members seldom see each other and sometimes they do not meet in person at all. Management education follows this trend, which is why e-facilitation in a blended learning environment or in a fully virtual learning environment is a welcome tool and method of working.

How do we define e-facilitation? What is intrinsically special about the role of the e-facilitator compared to the role of a face to face facilitator? Why have the participants of the VTC 4 with a background in management, tutoring, training and consulting found it so very stressful but in the end rewarding and exciting to participate in this course? These are questions which are addressed within the allocated space.

First the processes of e-facilitation and the roles of the e-facilitator will be defined. The second part of the paper will focus on the socialisation process (Salmon, 2000) and compares it with models of group development used in face to face groups. Finally an 'overwhelm effect' is identified which demonstrates why it can be particularly stressful to become an e-facilitator.

The paper is written from the viewpoint of action learning, and participative learning as described by Kolb's learning cycle (Kolb, 1984) and Mumford's additions (Mumford, 1987).

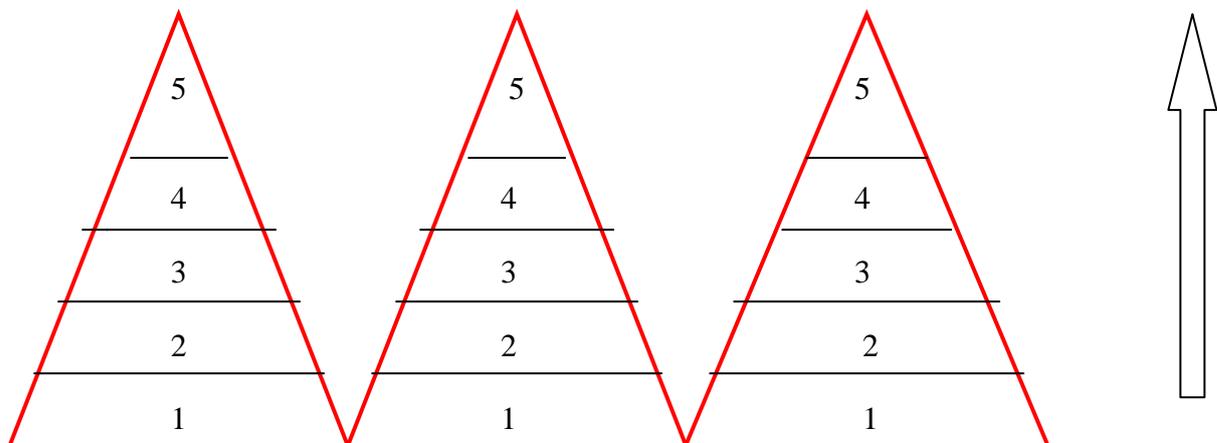
Within the scope of this assignment the conclusions are exploratory and some might even seem rather speculative reflecting mainly the opinion of the author. Yet, they might be seen as stepping stones in the exploration of the new area of e-facilitation to be kept or discarded in future learning cycles.

2. E-learning and the processes and roles of e-facilitation

2.1 The processes and design of e-facilitation

The author's experience tells of many failed e-group attempts with e-mail and Skype groups. With hindsight this can be allocated to the missing insight that a virtual space needs to be created in terms of task, time and technology. The task and the program design have to be integrated with the

technological design to construct the virtual space that would otherwise be the classroom or training centre.



	Collaborative Learning	Culture & Behaviour	Technology Enablement
5	Review Transfer & development	Integration	New links. Adapt and develop systems for interaction, action outside ACTION framework
4	Knowledge construction	Adaptation. Value the differences	Conferencing. Learning how to work effectively in a group
3	Information exchange	Acceptance, explore differences	Access data bases: e-resources (Rooms)
2	Socialisation & Trust building	Recognise, but minimise cultural differences	Learn how to communicate electronically. Send and receive messages
1	Motivation	'my way is best' usual behaviour (denial/defence)	System access; basic understanding of the systems

Figure 1: Symon's pyramid model of Action e-Learning (2005)

The metaphor of the clubhouse coined by Symons indicates adequately the qualities of the virtual space or conference room that needs to be interesting and engaging enough for participants to visit, stay for a while and come again. An e-facilitator should be aware of these conditions and check them before starting on his or her journey.

Once this is settled the development of the group begins. Symons' pyramid model (2005) describes this development in five steps in three different areas. In Figure 1 the sides of the pyramid are laid flat and the phases are described. The first area **Collaborative Learning** is based on Salmon's step model (Salmon, 2001) and describes the group process of the learners. The second area **Culture & Behaviour** draws on the cultural model of Milton Bennett (1993) and describes phases of development in intercultural groups from stereotyping to a fully integrating cultural understanding. The third area is developed by Symons and Galpin (1998) and deals with the **Technological Enablement** the group and every participant have to go through. This model will be used here because of its extensiveness and richness.

However, one assumption is questioned. In the model the steps of the ladder are reached sequentially. In the VTC 4, team1 found, however, in accordance with Levy's view (2000) that the phases maybe started out like this but that many of them repeat themselves and the process was more iterative and jumbled up than indicated in the pyramid (see appendix A).

2.2. The roles of the e-facilitator

What is an e-facilitator?

Dennis ea (2004) claim that tutors when they become e-tutors have to change from ‘a mere transmitter of knowledge’ to ‘a facilitator of learning’. They propose a list of possible e-tutor roles and competencies based on numerous definitions and competencies from literature research (Denis ea, 2004). The competencies are broken up into Pedagogical, Communicative, Expert Discipline and Technological competencies as depicted in figure 2.

	Role	Provides	Ped C.	Com. C.	Disc. Exp.	Tec. C.
1	Content facilitator	Interpreter, study concepts guide			X	
2	Meta cognition facilitator	supports reflection on learning activities and outcomes, study skills	X	X		X
3	Process facilitator	supports learning strategies	X	X		X
4	Advisor	pastoral support, institutional/local support / systems advice	X	X		X
5	Assessor	formative and summative	X		X	
6	Technologist	guide: first-post support with technologies and tools for learning				X
7	Resource provider	identifies, locates, develops and produces resources learning support			X	X
8	Manager/ administrator	supports and manages program administrative processes				X
9	Designer	assists in course and workshop designing along with tasks			X	X
10	Co-learner	‘friend to the end’	X	X		
11	Researcher	reflective practitioner and action researcher	X			

Figure 2: Competencies and roles of the e-tutor, adapted from Dennis ea. 2004

The author proposes to define the e-facilitator in the sense of Denis’ e-tutor. This definition is well summarised by Lentell in the following quote: ‘Tutors need to have knowledge and a broad conceptual understanding of their field. They have to be effective listeners and communicators, to be a coach, facilitator, mentor, supporter and resource. They have to listen, to shape, to give feedback, to motivate, to direct, to appreciate – broadly to be developmental and problem solving.’ (Denis ea. 2004, pg. 6)

From the learning journal of the author (VTC 4, 2007) the following list of issues and activities of the e-facilitator can be added.

'Boundary and group process issues

- # Establishing who is in the group and when the group starts and when it will end
- # Establishment of rules to work (rules of engagement) and netiquette within the working area
- # Co-ordinating relationships in the online environment with the participants,
- # If possible within the given frame allowing the group space to coordinate themselves once they have learned this.
- # Recognition of learning barriers and the ability to mitigate these and help participants overcome them.
- # Taking appropriate actions in order to manage group dynamics, change dynamics and development and transitional processes of the team in the given learning situation.
- # Working according to the Symons/Salmon developmental model or any other model that addresses e-learning group development' (from the author's learning journal VTC 4, 2007)

Evaluating the above activities and issues they can be allocated mostly to what Dennis discerns as pedagogical and communicative competencies although there is a heavy emphasis of group dynamic and coaching skills associated with the training and facilitation of groups.

Concluding it can be said that the roles of an e-facilitator are manifold and one starts to wonder whether they all can be held in one person's hand. In VTC 4 team 1 has made a valuable comparison between the roles of Denis's model and the functional roles used in HMC (see appendix B). In the College the roles are performed by three different persons which is one way in which this riddle can be solved.

3. Two Models for team development and socialisation

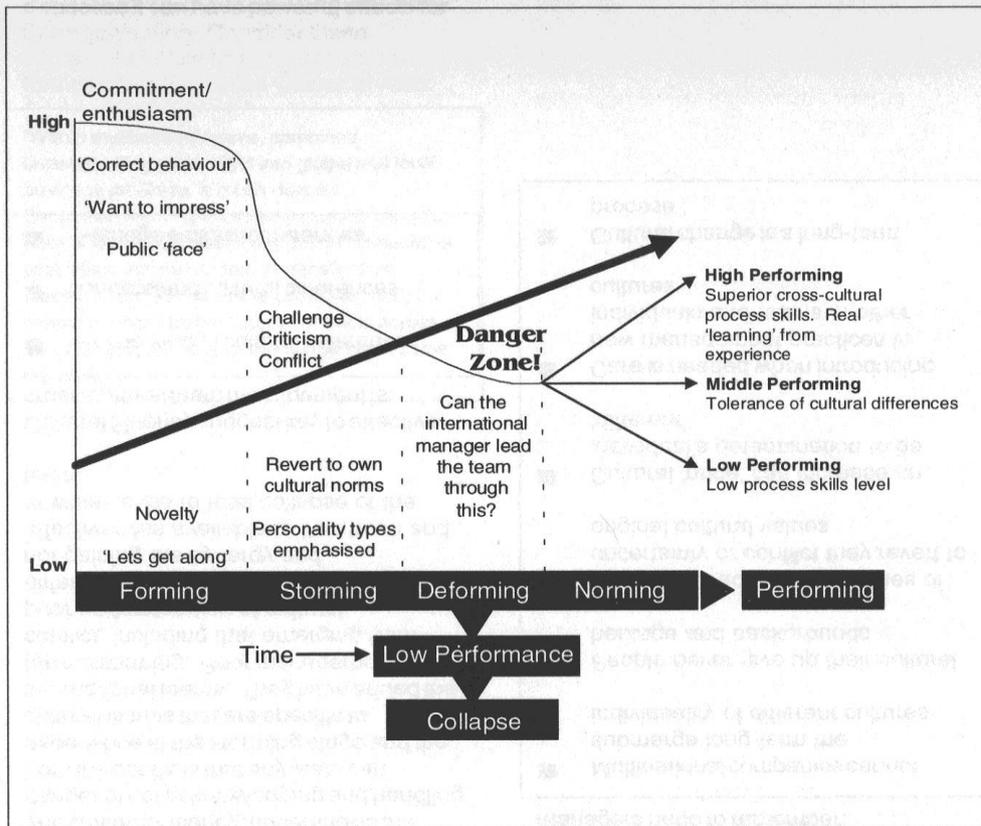
As there is more than 60 years of theorising on groups and groups dynamics the author has chosen two theories on group development to compare the face to face view with the e-view. The first is the classical phase model of Bruce Tuckman (1965): forming storming, norming, and performing and adjourning.

3.1. Tuckman 'International'

In figure 3 below Tuckman's model is brought into an international environment (HMC lecture, 2003). What is interesting in this view is that the problem of deforming appears in the first three phases; forming becomes deforming, because the participants cannot resolve the challenges of the storming phase. This is a critical issue in the building of international teams.

Translated into Bennett's phases of intercultural group development it would mean that the members get stuck in the first or second phase and no well functioning team can be formed, this is parallel to Symon's socialisation and trust building phase and depicted in figure 1.

Figure 8.7 Stages of international team working



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Figure 3: Henley MBA 'Cultural Aspects of Business in Europe', Henley DE, 2003.

3.2. Gibb and Trust Development

The second model the author would like to introduce is Gibb's model (1964) of trust formation (see appendix C). The trust formation model describes the four issues a group has to resolve in order to develop trust. The cycle starts with (1) Acceptance; the acceptance of self and others and (2) Data flow; the communication of content, but also of feelings and emotions. Only when there is enough basic trust grown by acceptance and open communication the third and fourth issue come into view. These are (3) Goal integration; which task are we going to work on and (4) Control; organisation of shared activities. This model describes the socialisation phase of Symons in terms of acceptance and communication.

Interestingly the claims of this model, that trust is developed through Acceptance and Communication, are supported by the outcome of a recent Henley paper. HWP *Telling Tales in Class: using Narratives in a Virtual Learning Environment* (McFadzean, Birchall, 2007) report in their critical success factors for virtual learning environments: a trustful team, learning to present and tell your tale, no hierarchy issues, positive feedback, creation of a safe environment (for a full quote see appendix D).

This is an indication that the same principles that apply in face to face groups do apply similarly in virtual groups.

4. Intrinsic differences and the concern of stress

4.1 The difference of *e*

Let us pause for a moment and go back to the question: What is so intrinsically special about the role of the e-facilitator compared to the role of a face to face facilitator?

What is the difference between the role of an e-facilitator of a virtual team as in the VTC 4 with group members from three continents and the role of a process facilitator of an international group with a creative task, who works in a multi-media environment with group members coming from different continents but physically assembled in one place?

Facilitation techniques, training methods and the syndicate method have created rich experience in the knowledge about teaching, training and facilitating action learning groups. Looking at the competences identified by Denis ea. (2004), many of the pedagogical, communication and expertise aspects are comparable to the ones needed in face to face groups. The one thing that is not compatible is the technology and the Virtual Learning Environment. Do all the competences change because of this different dimension? There are definitely differences in programming and process design, there is also a difference in the communication, there is a different pacing of study by the participants, study material, timing but once familiarised with these the author's guess is that former experience with groups will still hold. So the intrinsic difference between facilitator and e-facilitator is the technological competence. He or she has to be able to work the system itself and to assist participants or team members with their problems of technology which is quite a feat the author can conclude from personal experience.

Yet, when pondering these thoughts the idea comes to mind that this technology issue might be an elephant that will turn into a mouse in a few years time when the e-generation comes into view. Once technology is a commodity and people are used to work on the internet, make Wiki's, use the Same Time function and (B)logs this will be not much of an issue anymore. The development of groups and the building of teams will still have to happen and be facilitated.

4.2. The overwhelm effect

This point being made, why is it so daunting to work as an e-facilitator, what are the specific aspects that make this task so much more difficult to perform at the moment? Are these disheartening feelings only related to the unfamiliarity with the virtual learning environment and its specific technology?

The previous paragraph relates about facilitators turning into e-facilitators, but what about teachers, managers, advisors? If they want to take the role of the e-facilitator as defined in the previous pages, they will not only have to learn to tackle the virtual learning environment, but also the roles of facilitation, which include many new competences. On the top of learning to deal with the technical design and technology, there comes the transformation of roles from maybe classical teaching to facilitation, from managing and telling people how to solve problems to supporting them to find the answer themselves. Bennett and Marsh phrase it quite pointedly when they write: tutors are asked to 'run before they can walk'. (in Dennis ea, 2004 pg. 6). this might have been the reason that the teams of the VTC 4 experiences so much stress in the beginning.

In most books about stress (Cranewell-Ward, 1993; Smith, 1993) there will be a curve describing the relationship between arousal and performance. That is the kind of overload which leads to high stress and low learning and performance. With further overload a phenomenon develops where the

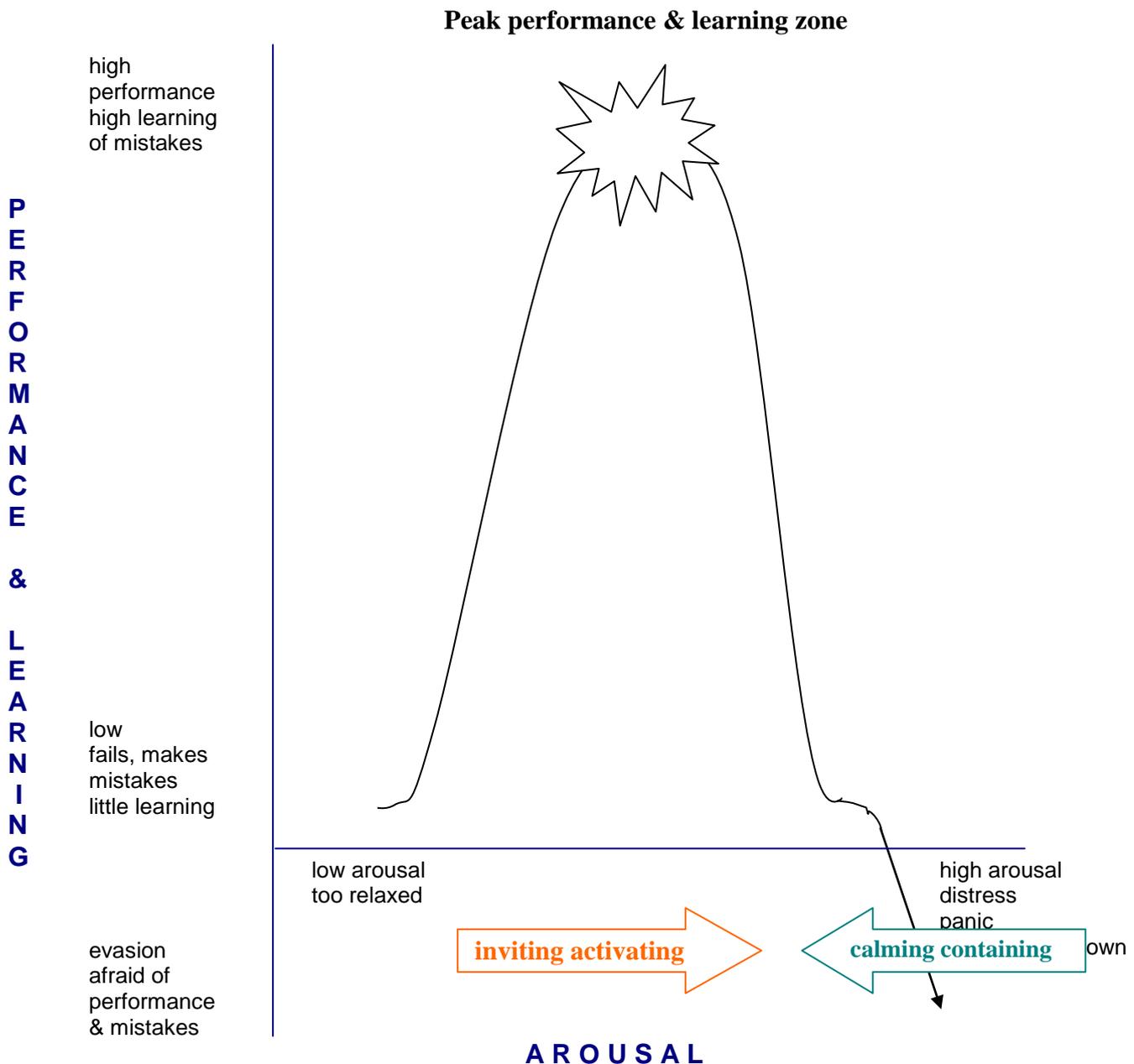


Figure 4: The Overwhelm Effect ; adapted from the Yerkes-Dodson Law: The inverted-U relationship between arousal and performance (Smith, 1993)

person starts to be afraid to perform and make mistakes at all. The author calls this the overwhelm effect. These dynamics of performance and arousal are depicted in figure 4.

When the learning environment, the content and the different people are unfamiliar, the facilitator will have to work hard to create a trustful environment. People have different reactions to unknown situations; some jump into action others are reserved. Figure 4 elicits the roles an e-facilitator might take, inviting and activating the too reserved participants to the scene, but also calming the ones by i.e. structuring the actions or working step by step when there is too much overload.

The overwhelm effect happens when stress is continued too long because of content, technical and social overload with tough deadlines to be reached. What can the e-facilitator do when ‘system

breakdown' is threatening? Getting the participants together and getting the technology to function while containing the anxiety is the first step in the right direction. Once the first distress is channelled and mitigated by the e-facilitator when communication was sufficient in the team, trust and confidence will grow and team members can start to reflect and enter a first learning cycle.

In this perspective the socialisation and trust building phase of Symons is most important. From all the roles an e-facilitator will take, the ones that help the group to become a well functioning team seem to be vital for the survival of the group and the learning system.

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The ideas about the overwhelm effect were developed with Marc Tassoul in several discussions sharing experiences as facilitators of virtual and face to face teams.

Appendix

A. Symons' phases and e-activities divided in Start up, Performance and Closure of the team

B. Competences and roles of the e-tutor compared to HMC roles

C. Gibb's model for trust formation in groups

D. Critical Success factors on a model of story telling in Virtual Learning Environments

Appendix A

Symons' phases and e-activities divided in Start up, Performance and Closure of the team

Start up

1. Access and Motivation

Design activities that familiarise the group with the virtual learning environment and support them actively. Examples are: Introduction; Activity brief; animated glossary; overview of the course, e-tivities to practice in the system and the various parts of it, asking everybody to go on Skype,

2. Socialisation

Design activities for the team to get to know each other at own pace; Examples are: writing your profile, asynchronous discussion threads with much support from PT, starting to write a journal, react on other's journals, demonstration of the Wiki by the teacher, have teleconferences led by the Personal Tutor

Performance Phase (phases can be iterative and repeat themselves)

2. Socialisation

3. Information Exchange

Activities to familiarise the team with the task and theory and make own contributions: Examples: First collaboration in team, try out Wiki make pages, have synchronous meeting on Same Time helped by PT, share information, start own discussion threads

4. Knowledge Construction

Activities to give the team opportunities for creating their own meaning: Examples are: Critiquing theory, Learning reflections and comments in journal; discussions and decisions on issues, creating own knowledge like overviews, taxonomy's, experience and theoretical debates,

5. Review and Development

Activities to support thinking about the process and the task and also the personal development of team members

Examples are: Reflection questions to be answered in journal, discussion of group dynamics and process and personal development, reflecting on and planning the closure of the group

Closure

5. Review and Development

6. Transfer

Activities that help participants to transfer the gained knowledge to their own working environment. Examples: action planning for next month, reflective and evaluative response on the course, Peer and Tutor Assessment, Transfer learning's into work environment

Appendix B

Role	Pedagogical Competency	Communicational Competency	Discipline Expertise	Technological Competency	Henley role
Content facilitator			X		Subject tutor
Metacognition facilitator	X	X		X	Personal tutor
Process facilitator	X	X		X	Subject and Personal tutor
Advisor	X	X		X	Personal tutor
Assessor	X		X		Subject tutor
Technologist				X	Personal tutor HMC
Resource provider			X	X	Subject tutor (personal tutor)

Figure1: Competencies and roles of the e-tutor, Central roles VTC WIKI team 1, 2007

Role	Pedagogical Competency	Communicational Competency	Discipline Expertise	Technological Competency	Henley role
Manager/administrator				X	Admin associate HMC, personal tutor
Designer			X	X	Subject tutor
Co-learner	X	X			Personal tutor
Researcher	X				Subject tutor (personal tutor)

Figure 2: Competencies and roles of the e-tutor, Peripheral roles VTC WIKI team 1, 2007

Appendix C

Gibb's model for trust formation in groups

In his model on "climate for trust formation" Gibb (1964, 1975, 1991) states that the first dimension of any group formation is 'acceptance of self and others'.

The model on trust formation (Gibb, 1964) has caught and kept my attention for two reasons. First a theoretical one namely the combination of a psychological and a systemic framework, and secondly a practical one; its applicability as descriptive but also as an intervention model when working as a trainer and facilitator of small groups. It is a cyclic model of development describing and identifying trust as a basic issue.

According to Gibb there are four fixed issues or modal concerns, as he calls them, that every group has to deal with successfully in order to attain a climate of trust in a group. In the 1960's Gibb has done considerable research on these dimensions (Gibb, 1964). According to his model a person needs to learn to create a 'defensive-reductive climate' that will reduce fears and distrusts continuously and thus acceptance of self and others will be achieved. When a person learns to do this in participation with others he learns to create the interpersonal situation that will help him to accept himself and others. That makes changes possible along the other three modal concerns.

"The **acceptance** concern has to do with the formation of trust and acceptance of self and of others, the reduction of fear of self and of others, and the consequent growth of confidence. This concern becomes differentiated into concerns about degrees of membership in the various groups of which the person is a part [inclusions/exclusion dimension].

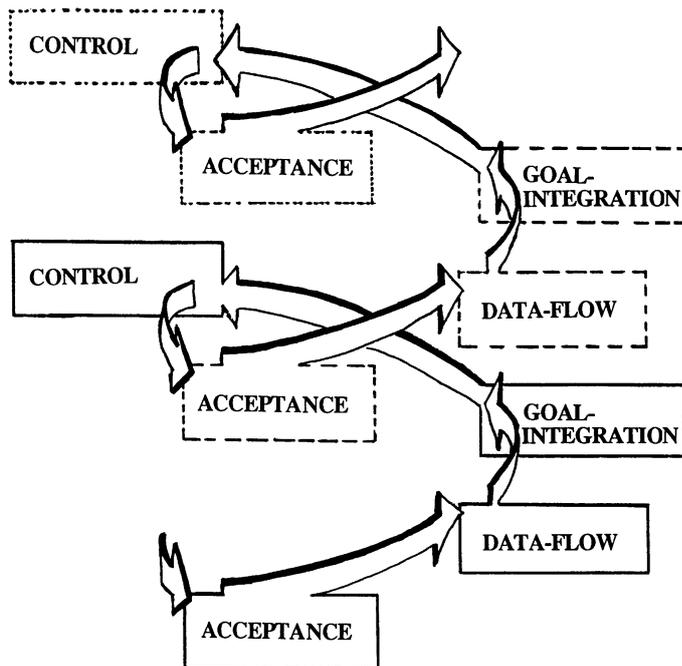
The **data-flow** concern has to do with the flow of feeling and perceptual data through the person or through the group; the system output of behavioural cues and all communicative evidence of attitudes, feelings, and

perceptions, and the system input of such data. This concern finds its expression in decision making and choice behaviour in the group.

The **goal-formation** concern has to do with the continuing assessment of intrinsic motivations in the person or the group and the integration of motivations at various levels into actions sequences, problem solving, and decision making. This concern becomes differentiated into a concern about productivity, about doing work, having fun, ideas, learning or growing.

The **control** dimension has to do with intrapersonal and interpersonal control or regulatory mechanisms that lead to co-ordinated sequences of behaviour in the person, sequential flow of behaviour in the group, formation of roles and expectancies and integration of function into structure at all levels of behaviour. This process becomes a concern about organisation, which in the sense we are using the term, has all degrees of formality, stability, awareness, and complexity in all variety of social relationships.” (Gibb, 1964, pg.280-281)

Positive Spiral of Group Development



A group in action is continuously confronted with these concerns. There is a certain order: whenever acceptance is low the flow of relevant data will be restricted. With insufficient data it is very difficult to come to good decisions or to commit oneself to a common goal and following actions. When no integration of different goals is found and a shared vision is developed leadership will not be looked at in function of the task but the problems will often be solved by the use of power. This will lead to less acceptance and so on. Contrary to this negative spiral or vicious circle a group can come into there is a positive spiral. Every of the concerns will almost cyclically repeat itself as is shown in figure 4.4. Note, that the arrows could also point in the opposite direction which would represent a vicious circle a group might be trapped in. Of course these are ideal types, Gibb reports that ‘the categories are in no sense discrete, but are highly interdependent and that all variations in

the concerns can come up’ (Gibb, 1964). Groups will return to one or to other and not very much consistency is found. According to this model any major change (e.g. of membership) will bring the group back to an earlier point in its development, as acceptance has to be found again in the new situation. (Hohn, 2000)

Appendix D

“Critical success factors for a model of storytelling in a Virtual Learning Environment

1. A clear and valuable purpose for using stories for learning
2. A short training session on storytelling, if necessary, for those who are inexperienced at constructing and presenting narrative
3. A committed, trusting and enthusiastic team with no hierarchical, authority or power issues
4. An effective and appropriated sophisticated learning environment
5. Relevant tools to aid learning and reflection such as the introspective journal
6. An experienced facilitator who is skilled at supporting the group, creating a safe environment and extracting learning points from the participants
7. Positive feedback from (a) the facilitator to the group, (b) the group to the facilitator and (c) from participant to participant
8. A useful output such as a learning and development plan”

(Elspeth McFadzean & David Birchall; HMC, EU’s Leonardo Project, 2007)