Facilitating Learner Success Through Theory-Based Instructor Training

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This conceptual review examines how theory-based instructor training can support learner success in online education by fostering autonomy, engagement, and self-regulation. Drawing on self-regulated learning (SRL) and transactional distance theory, the paper highlights the critical role of instructors in reducing psychological distance and promoting student-directed learning. It emphasizes that many faculty members lack formal preparation in pedagogy, particularly for the online environment, and thus require structured development opportunities. The review advocates for training programs that mirror the student learning experience, enabling instructors to practice and apply SRL strategies in their teaching. Components such as reflective goal-setting, peer interaction, meaningful feedback, and structured content delivery are essential to student and instructor development. Institutional approaches to faculty support—such as mentoring, incentives, instructional design collaboration, and alignment with quality standards—are explored. By adopting training frameworks grounded in SRL and transactional distance theory, institutions can improve instructional consistency, increase faculty confidence, and ultimately enhance student achievement in flexible and distance learning environments.

Keywords: online learning, self-regulated learning, transactional distance, faculty development, instructor training

INTRODUCTION

Online courses are a common and growing form of distance learning in higher education. Indeed, distance learning is often considered synonymous with online learning although the latter simply reflects a method of delivery (e.g., via the Internet) whereas the former includes multiple delivery methods (e.g., print or CD-Rom materials delivered via mail; broadcasting or teleconferencing via television, telephone, or Internet video). Distance learning is also characterized by the geographical and/or psychological separation of teacher and learner (Saba, 2016; Moore, 2007, 2013) whereas in some forms of online learning, the instructor and the student are co-located in the physical environment (e.g., blended or hybrid courses).

Flexible learning refers to offering students choice in "how, what, when and where they learn: the pace, place and mode of delivery" (Higher Education Academy [HEA], 2015, para 1). Flexible learning shares similarities with distance learning, designed to empower learners and provide educational choice in an economical and manageable way for both institution and student (HEA, 2015). *Pace*, for example, includes accelerated and part-time learning, a characteristic of distance learning, but also credit for prior learning; *place* includes classroom, home, and mobile learning, but also work-based and experiential learning; and *mode* refers to delivery through various technologies (Gordon, 2014). Flexible learning encompasses more aspects of learning but is based on the same premises as distance learning.

Both flexible and distance learning seek to expand educational access to a range of learners in higher education (Andrade, 2016), and particularly to those needing to balance study, work, and family (e.g., in the United States, 58% of students work while attending college and 26% are raising children; Lumina Foundation, n. d.). Choice—how, what, when, and where to learn—is reflected in the concept of autonomy, which has been extensively addressed in distance learning and reflects not only the freedom to choose, but also self-direction (Garrison, 2003; Holec, 1981; Hurd, 2005; Little, 1991, Oxford, 2008; White, 2005). Related to the latter, self-regulated learning (SRL) has been emphasized as the means through which distance learners can learn *how* to be effective by taking responsibility for the factors that impact their learning (Andrade & Bunker, 2009; Andrade, 2014a, 2014b; Dembo, Junge, & Lynch, 2006). The instructor role involves facilitating the development of SRL. In other words, rather than simply providing learning materials, the instructor must help manage the learning process for the student (Ryan & Tilbury, 2013).

Changes in the higher educational landscape in terms of flexible and distance learning involve multiple stakeholders, of which faculty members are critical. Distance learning sees the learner as central in the educational process with the instructor facilitating learning (Saba, 2016). Consequently, instructors must adjust to institutional pressures to design and teach online courses and adopt a different role related to teaching and learning. This review explores the teacher role in online courses in relation to two theoretical foundations—the theories of transactional distance (Moore, 2007, 2013) and SRL (Dembo et al., 2006; Zimmerman & Risemberg, 1997; Zimmerman, 2002) with implications for related training. This exploration aims to identify how institutions can support faculty members in facilitating learner success in an online context.

THEORIES

Distance learning delivered through technology enhanced learning environments provides a solution to the increasing global demand for higher education. These environments can aid the development of learner self-regulation, or the ability to control the conditions that affect learning, a prerequisite for success in distance education. Based on the theories of transactional distance (Moore, 2007, 2013) and SRL (Zimmerman & Risemberg, 1997; Zimmerman, 2002), the Model of Self-Regulated Distance Learning has been applied to online distance English language courses to increase learner self-regulation (Andrade & Bunker, 2009, 2011). Previous studies have explored the model's effectiveness by examining student learner journals, interviewing learners to determine retention of self-regulated learning (SRL) behaviors, and analyzing teacher feedback on SRL assignments (Andrade & Bunker, 2011; Andrade, 2014b).

The model posits that students enter an online course with certain levels of self-regulation. Through the structure and dialogue in the course, as facilitated by the instructor, they can develop a greater capacity for autonomy, and thus, greater likelihood of success in the online environment. Structure, dialogue, and autonomy are components of the theory of transactional distance (Moore, 2007, 2013). Transactional distance refers to the psychological distance between the learner and instructor. This distance is modulated through varying levels of structure, dialogue, and autonomy, and specifically the "quality and quantity of communication between the instructor and the learner" (Saba, 2016, p. 19).

Structure is represented by the objectives, content, teaching strategies, and assessment measures in a course. Dialogue refers to the communication between the learner and instructor in a variety of forms such as e-mail, announcements, and assignment feedback as well as peer-to-peer communication. Autonomy refers to what, how, and how much to learn, and consists of two types—instrumental and emotional (Saba, 2016). The former describes learners undertaking a task without help, and the latter to performing tasks without outside reassurance. When dialogue and structure are high, autonomy is low.

SRL consists of six elements—motive, methods, time, social environment, physical environment, and performance. Strategies related to each of the components, such as identifying purpose for learning and setting goals (motive), implementing various learning and study approaches (methods), setting priorities and following a schedule (time), seeking help (social environment), choosing an appropriate location and time of day for study (physical environment), and monitoring outcomes and goal achievement (performance) are tools for developing greater autonomy, or the ability to be self-directed. Help-seeking in

SRL theory is viewed positively and leads to greater achievement. Autonomous learning does not mean completely isolated or independent learning, but rather the ability to direct one's learning and make appropriate choices. However, as levels of autonomy increase, learners are likely to be able to do more tasks without help.

Training

Given that the goal of distance and flexible learning is to advance "the personal goals and professional aspirations of diverse learners" (Beaudoin, 2016, p. 11), and that higher education faculty members have typically not been trained to facilitate online learning, let alone the development of autonomy through self-regulation strategies, addressing this need is critical in order to enhance both the effectiveness of the instructor and the success of the student. It should be noted that most higher education faculty have not been trained in pedagogy at all, let alone online pedagogies (Xu & Morris, 2007). However, most universities offer some type of internal training for teaching online, although it may be in the form of informal mentoring (Allen & Seaman, 2011).

Institutions may also use a rubric to evaluate course effectiveness (Franker & James, 2016; Quality Matters, 2015), and track student success in online courses. Rubrics measuring quality focus on various aspects of online course design such as introduction, learning objectives, assessment measures, materials, activities and interaction, technology, support, and accessibility (Quality Measures, 2015). Faculty members may have access to a professional instructional designer, who can help ensure these elements are present, and that assessments and activities are aligned with learning objectives. Faculty and the courses they develop benefit from both a formal course review process and informal mentoring (McLennan, 2011).

Faculty doubt the efficacy of online learning in terms of meaningful interaction, and believe that online courses are inferior to face-to-face, ineffective in helping at-risk students, and result in lower achievement of learning outcomes (Jaschik & Lederman, 2014). However, only about one-third of faculty have taken an online course themselves or taught one (Jaschik & Lederman, 2014). It is unknown if training and quality assessment practices change faculty perspectives, but there is evidence that faculty at institutions with online offerings and those that offer both online and traditional degrees are more favorable and accepting of online education than those at institutions with no online degrees, based on the perceptions of chief academic officers (Allen & Seaman, 2011).

Training may occur at the institutional level through units responsible for supporting and enhancing teaching and learning, or at the department level, particularly when multiple sections of a course are offered and consistency is needed across instructors. Most universities operate on the principle of faculty autonomy, however, with faculty members having the freedom to teach their courses according to the methods and approaches they deem most effective; thus, online course development needs to allow for latitude with the faculty member being the key voice in decisions related to teaching and learning. Online course offerings are often supported by a collaborative team with an instructional designer and the instructor serving as the subject matter expert (Xu & Morris, 2007).

Universities may offer incentives in the form of monetary rewards to encourage faculty members both to redesign their traditional courses for online delivery and to teach online. Help may also be offered through course specialists who support the faculty member and students with the technology needed to be successful, and through teaching assistants to aid with assignment grading, particularly in large enrollment sections. Encouragement may also occur in the form of rewards related to tenure and promotion or recognition by the institution in the form of awards and events for effective course design or online teaching strategies, depending on what the institution wants to emphasize.

Training programs may be required prior to faculty members being assigned or allowed to teach online or they may be optional (Lion & Stark, 2010). Sixty percent of institutions require some training prior to teaching online (Lion & Stark, 2010). Fifty percent of faculty, however, say that support in the form of training and instructional technology is too low (Jaschik & Lederman, 2014), suggesting that these practices are not sufficiently widespread.

Instructor training commonly mirrors the learning experience of the student and is delivered online using the same technology that students use and with many of the features of an online course, such as

participating in discussion forums, uploading assignments, and taking quizzes online (Dimeo, 2017). Individualized and group trainings and formal and informal training are all options. Indeed, the types of training offered have expanded to meet growing needs and the time constraints of faculty (Dimeo, 2017). Faculty support may occur in the form of posted FAQs, or through webcasts and workshops, informal gatherings, or annual conferences (Dimeo, 2017). Another component is ensuring faculty converses with the learning management system and technology options (McLennan, 2011). Approaches may also include Q&A postings or refresher workshops (Dimeo, 2017).

Faculty development and training is the top priority related to online learning for higher education leaders (Frederickson, 2017). The academic discipline of business makes a good case study based on the extensiveness of online degrees offered and business school approaches to faculty training, particularly since rigorous professional accreditation standards govern many business education programs. Undergraduate and graduate business degrees are the most awarded degree in the U.S. (National Center for Education Statistics, 2017). Not surprisingly, online business degrees at both the undergraduate and graduate levels are the most in demand (Clinefelter & Aslanian, 2016), and among the most frequently offered online degrees in Canada, the U.S., and globally (Bates, Desbiens, Donovan, Martel, Mayer, Paul, Poulin, & Seaman, 2017; Hanover Research, 2011, 2014).

The Association to Advance Collegiate Schools of Business (AACSB) standards apply to all degrees, not only online degrees, and include "policies and processes to enhance the teaching effectiveness of faculty and professional staff involved with teaching across the range of its educational programs and delivery modes" (AACSB International, 2013, p. 34). Kunz and Cheek (2016) propose a series of questions to investigate the growth of online learning across business schools, including a focus on training related to the development of online degrees. Such questions explore whether the training was offered when such programs were initially launched, whether it was formal or informal, internal or external, and whether it addressed technology and learning management systems and pedagogy and design. However, information about training content and effectiveness is not widely available.

SRL & Autonomy Focused Training

Topics for online teacher training might focus on instructor roles, quality standards, learner engagement, multimedia, group work facilitation, feedback options, student support, and many others. A framework for faculty training specifically designed on the theories of transactional distance and SRL, discussed earlier, with the aim of helping learners develop autonomy through the application of SRL strategies and be successful in the online environment, suggests beginning with identifying the needed skills and knowledge of the instructors and modeling the online training experience after the student course (Andrade, 2015). The identification of skills and knowledge can occur collaboratively with the instructors and be modified depending on their prior experience. By modelling the student course in the training course, instructors learn first-hand how to practice and apply SRL strategies and be prepared to facilitate SRL development with students.

For example, the training course's content provides *structure* with content modules and due dates; *dialogue* occurs through the social environment as teachers share their goals and teaching experiences and build community. The SRL component of *motive* is practiced as teachers set goals such as redesigning a face-to-face activity for the online environment or practicing a particular response strategy. These activities and strategies involve applying the content provided and reflect the SRL component of *method*. Instructors also view student assignments and model responses and then write their own examples responses. Most of the training occurs concurrently while instructors are teaching online, enabling concepts to be applied and reflected on. This also makes instructor exchanges meaningful.

Teachers seek help from each other through the discussion board, thereby utilizing the *social environment*. They monitor their *performance*, reflect on their goals, and report on them like students do. Goal achievement results in increased motivation and skill for both instructors and students. Instructors use the same technology that the students use. Teachers also evaluate each module upon completion and make suggestions. In this way, both students and instructors can increase their autonomy level, encompassing both choice and self-direction. Evaluations of this approach have shown extensive improvements in the

appropriateness and adequacy of the feedback teachers provide to students, and better facilitation of SRL (Andrade & Bunker, 2011; Andrade, 2014b).

While SRL and transactional distance are valuable theoretical lenses through which to view course design and support student success, they are certainly not the only approaches. Many courses build in some type of reflection on performance at a minimum. The six components of SRL provide a practical means of assisting students, have a long history of improving achievement (Dembo et al., 2005), and lend themselves well to an online environment.

CONCLUSION AND PRACTICAL IMPLICATIONS

Training for the online environment will vary depending on purpose – is it to help faculty members design a course, or to teach a course, for example? Is the purpose to ensure consistency in sections across a single course? Is it focused on gaining familiarity with technology, or how to make activities engaging and interactive? Is the course based on particular theoretical underpinnings with which instructors must be familiar? Would an understanding of transactional distance and its components or SRL benefit instructors? How can the training help the instructors network and create community? These are all questions to be considered.

That distance learning is growing in the form of online courses is well-established as is increasing demand for higher education and the need to provide access to diverse learners. Institutions must provide support when implementing various forms of flexible learning and recognize that education is a "partnership between [higher education providers] and students to provide accessible yet manageable learning opportunities for a wide range of people" (Higher Education Academy, 2015, p. 4). As such, approaches to addressing faculty concerns over the quality and efficacy of online courses, and establishing training and tracking mechanisms are paramount.

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