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# Ideas for Online Learning

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*If you want to teach people a new way of thinking,  
don't bother trying to teach them. Instead, give them a tool,  
the use of which will lead to new ways of thinking*

—R. Buckminster Fuller

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Communication technology is at a point now where online education has become a reality and we are headed toward widespread online leadership education. This thought was expressed by a colleague when we were discussing issues related to online education. I agreed with him. The trends to move to online learning and working remotely had already begun to gather momentum. COVID-19 simply accelerated that pace, which led to changing the way we deliver programs. If we look further, it is also changing how we provide care and manage or lead organizations. I do acknowledge that not everyone has the luxury of working from home and there are essential workers who are still offering programming in person. It also remains the case with healthcare workers and other essential workers who continue to provide services.

This chapter provides an account of how my colleagues and I adapted our programs and have moved to online programming because of COVID-19. Like many other colleagues, we had a short turnaround time to move our in-person program to online programs, and we were forced to see ourselves and our leadership programs in a new light. We were required to dig deep down within ourselves and draw upon our sense of creativity and our determination that we would offer the programs virtually. Flexibility and the ability to adapt to the new or the unexpected were the vital traits of leadership that we all relied upon then and continue to rely upon now. We also had to work hard to learn various technologies to adapt our in-person programs to a virtual format.

Though we shifted all our leadership offerings to online platforms, the co-curricular programming continued to follow Kolb's Experiential Cycle of Learning and the Learning Zone Model. There was no time to research, study, and come to conclusions about what a virtual format would look like; we simply did the best we could, just as everyone does and needs to do in times of emergency. Until the spring term of 2020 concluded, we were not able to reflect on the relevance of the Seven Pillars of Design, on which our Rocky programs are based. Despite this, the strength of the Seven Pillars of Program Design carried us through that time of ambiguity and change. Subsequent review of literature on online learning revealed that we were merging the Community of Inquiry (CoI) Model with Kolb's Experiential Cycle of Learning without even being aware of it.<sup>1</sup> The new insights we developed resulted in the articulation of the eighth pillar, **participant**

**learning and empowerment**, described in the introduction of this book. Participant learning and empowerment is not new to us, but it certainly deserves its own pillar.

This chapter is devoted to facilitating effective teaching and learning in a virtual format. Before I begin, I want to acknowledge that although some of us are newcomers to the world of online learning, it has existed for a long time. Now speaking from the recent experiences of teaching an online course and working with the Rockefeller team members to adapt our programs to a virtual format, I recognize how much more there is to learn about online teaching. The Rockefeller Center mainly offered opportunities for synchronous learning, which happens in real time with participants and facilitators interacting with one other. Asynchronous learning, by contrast, takes place without real-time interaction. There are many hybrid learning models which are a blend of both asynchronous and synchronous online learning for our team to explore. Our sudden need to determine how to convert our live programming to synchronous virtual programming was immediate. We were able to also incorporate asynchronous instruction. Now that we have seen the success and the flexibility in our asynchronous programming, we plan to offer more of these learning experiences in the future.

So, what are my thoughts about these two ways of offering learning experiences to participants? Plan for synchronous sessions, asynchronous sessions, or a combination of the two, using the Eight Pillars of Program Design.

Some educators believe that in-person courses and programs are more effective than online learning formats. Through this recent experience of moving to virtual programming, I believe the fundamental pillars of program design are the same and that the two formats are simply different in style, not substance. In a virtual format, we need to carry over our learning from in-person programming on the innovative practices in delivering content, engaging learners, and creating a space in which our participants can have control and agency over their own learning. While human contact and connection in-person are wonderful, we can “reach out” through our screens and make authentic connections with each other. As facilitators of online learning, we need to be willing to share our authentic selves and organize content in such a way that it not only strikes the imagination of our learners but, at the same time, inspires them to take control of their own learning. We can also create community and cohesion so that we, as well as the participants, feel supported and build lifelong friendships and relationships.

Recall that we discussed the Eight Pillars of Program Design in detail in Chapter 2. These were Intentionality, Structure, Theoretical Grounding, Rigor, Community, Reflection, Assessment and Evaluation, and Participant Learning and Empowerment. In this chapter, I will review how these pillars might or might not work in a virtual format. The chapter also includes practical tips for facilitating and helping others to facilitate in an online environment, some technological considerations, and a few concluding thoughts.

## How One Might Move to a Virtual Format

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Earlier, I mentioned that transitioning from an in-person format is a matter of change in style, not in substance. Once the flurry of program implementation ended, I took a moment to review the existing seven pillars of design upon which our programs were originally built and discovered they were naturally applicable to a virtual format. I also discovered that we needed to have an eighth pillar. This is an account of how the eight pillars were addressed or not addressed by the transition to a virtual format.

## Eight Pillars of Program Design in a Virtual Format

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Although I mention the Eight Pillars of Program Design as separate and distinct categories again in this chapter, they are interrelated, build upon each other, and inform each other. If you adopt this framework, please take the time to notice how they influence each other.



**Intentionality:** Incorporating intentionality within the virtual sessions meant we had to consider the additional implications of what it meant for students to not be on campus and instead learning from home. Once again, participants and their needs rose to the top of our concerns. We recognized that in addition to adjusting to a virtual format, some students, as well as presenters, faced additional constraints not normally found in an in-person session. These included such things as poor-quality internet, differences in time zones, and distractions found from working at home. Crafting a program that addressed these considerations was critical. We needed to acknowledge these difficulties and demonstrate flexibility at the beginning of the program in order to make participants comfortable. For example, we encouraged participants (registered in the program) with poor internet connection to return to the session(s) without worrying about being disruptive to others. Another action taken was to allow the option to keep their cameras off while attending the program. This allowed participants who felt uncomfortable about their surroundings being visible to participate freely without feeling embarrassed or violated.

What conclusions can we draw from this sense of discomfort? On the one hand, it is important to have an understanding that when having their camera on, students are allowing us into their homes, into their space. For a variety of reasons, they may not be feeling comfortable having us there. At other times, we may not feel comfortable being there and seeing what we see on their cameras. On the other hand, there are other faculty members who feel that keeping the camera on promotes engagement and mitigates multi-tasking. This is a challenge all of us face and I believe that there is no right or wrong answer because it is context-specific.

There are other considerations while offering programs online. Program staff were forced to very quickly consider that participants were often looking at a brightly lit screen for hours at a time, engaging in Zoom call after Zoom call. Giving everyone stretch breaks or quiet time to contemplate an idea away from the screen was a way to address this. It was done frequently throughout the programs offered by the Rockefeller Center. Additionally, through a virtual medium, understanding how to address the communication styles of introverts and extroverts in the room rose again to the

top of our concerns—being inclusive to both was critical. Reflective activities off-screen also drew introverts into the program as it gave them time to think and rest from the screen as well.

Uma A., class of 2023, reflected on her time with the Center’s Civic Skills Training Program that was offered virtually for the first time. Here is an insight into how an introvert developed confidence:

One CST lesson that stands out to me is... [the speaker’s] public speaking session. As a naturally introverted person, I have struggled with expressing myself to others. When [the speaker] told us that public speaking is every time that we speak, it resonated with me because I often felt the same nervousness while speaking in class, to peers, or on Zoom as I do when formally addressing a crowd. [The speaker’s] lesson, like each CST lesson, provided practical advice on how we could improve our professional skill set. In the case of public speaking, [the speaker’s] advice on reminding yourself of what you want to improve right before speaking not only helped me develop professionally but also personally. I am so grateful for this lesson as my ability to speak confidently and assertively has allowed me to contribute to workshop discussions among staff of varying levels of seniority, to ask clarifying questions whenever I needed, and to express my ideas and passions more effectively. I appreciate all of the professional and personal growth that my First-Year Fellows experience has sparked in me, and I look forward to pursuing more opportunities through Rocky throughout my remaining time at Dartmouth.



**Structure:** Establishing structure in a virtual context meant addressing additional nuances. We were fortunate to have a wealth of tools and platforms at our disposal. Structure calls to mind the “who, why, what, when, where, and how,” and we used these questions to guide our technology selections and implementation. When we looked at who was planning to participate in the programs, not surprisingly, we noticed that in two programs (Management and Leadership Development Program and the Rockefeller Global Leadership Program), participant enrollment dropped because many opted to do the program in the future. The Rockefeller Leadership Fellows Program did not suffer much because only two formal sessions were left in the spring term as a continuation of the year-long commitment, and they went very well. The facilitator for one of the sessions was very experienced with online teaching. For the other session, we invited participants to submit questions and used these questions to interview a guest speaker. We then provided the recording of the interview to the participants. They reviewed the recording before the session and we used the planned session time to discuss the speaker’s views on management and leadership, what participants had learned, and how the learning from this session applied to them.

Turning back to our own experience in implementing online programs, expectations of enrolled participants made us not only learn how to use online tools but also work hard to make interactive sessions meet participant expectations.

Our programs needed to be housed in a platform that would allow an open, easy channel of communication with participants and that would host additional program materials such as

submitted pre-work assignments. For Civic Skills Training (CST), we recognized that Unified Communication and Collaboration platforms were being widely adopted in response to remote work because they enable users to work together in one space. For example, we opted to house the Civic Skills Training Program in Microsoft Teams to help students become accustomed to this type of collaboration platform, commonly used in professional environments before their fellowships. Through the instant message feature, we could post announcements and reminders, and engage in quick chats. Canvas and Google Classroom were used for other programs to reach similar results.

Our programs also needed a synchronous component for the sessions. At the time we went online, we opted to use Zoom because of the various features such as polls, chat sessions, and breakout rooms this platform offers. All these features offered ways of both adding variety to these sessions while addressing different goals. More recently, many other video chat platforms have advanced to offer similar or the same capabilities that may be suitable for a particular context and allow users to consider other options as well.

The most significant change in this pillar was in how facilitators worked with us to prepare for their sessions. They, too, wrestled with ideas and with technology and worked hard to retain the interactive nature of their sessions. I attended discussions with the facilitators and learned that a majority were unfamiliar with remote teaching and learning. Those who were familiar willingly shared their expertise and advice. It was an honor to belong to such a committed group of educators, scholars, and practitioners who helped the Rockefeller Center maintain its dedication to deliver virtual programming.

The Session Proposal Form (Handout 2.5 in Chapter 2) we typically use to design our in-person programs was the most helpful tool in conversations with all the facilitators. Conversations focused on whether the learning objectives would remain the same; how key concepts and definitions and corresponding activities would need to be adapted; what reflection activities would work; and how the session would flow. Prior to the actual sessions, we also introduced practice sessions for speakers who were not comfortable with technology. These practice sessions also helped staff to assist the facilitators because they were aware of when and how to help with technology tools. This was additional work for speakers and program officers, but they did it willingly. I believe that this approach not only made the session implementation rigorous, but it also gave facilitators a chance to develop their comfort with implementing their sessions. It was marvelous to see how helpful and patient participants were when some aspect of technology did not work as well as planned.

In some cases, the speaker was able to use all of Zoom tools on hand to deliver the content. Table 8.1 is an example of how Kate Hilton, a Rockefeller Leadership Fellows Program facilitator, adapted her in-person session to a virtual format using a few tools (e.g., chat function and breakout rooms). While this was “new” at the time, the main point is that there are so many tools that can be used to make a session lively and mimic an in-person experience. Table 8.1 uses a part of her session proposal form to show how she adapted her in-person session to a virtual format.

**Table 8.1***In-person Session Versus Its Adaptation to a Virtual Format*

Time Required	In-Person Description	Virtual Description
5 minutes	<p><b>Introduction</b></p> <p>Present the objectives, emphasizing that they will be exploring the psychological experience of change, psychology of change framework, and practice of using open, honest questions to elicit and understand people's feelings on change. <b>Invite participants to ask and answer questions throughout the session.</b></p>	<p><b>Introduction</b></p> <p>Present the objectives, emphasizing that they will be exploring the psychological experience of change, psychology of change framework, and practice of using open, honest questions to elicit and understand people's feelings on change. <b>Invite participants to use the chat function to ask and answer questions throughout the session.</b></p>
15 minutes	<p><b>Discussion</b></p> <p>In pairs, participants identify the changes that they have experienced in the past couple of months and how they have managed the change. After 7 minutes, bring participants back to the large group. <b>Ask participants to report their discussions.</b> Share your personal experience regarding change and how you have experienced it. The objective is to enable participants to reflect on their own psychological experience of change.</p>	<p><b>Discussion</b></p> <p><b>Using breakout rooms,</b> put the participants into pairs. In pairs, participants identify the changes that they have experienced in the current pandemic and how they have managed the change. After 7 minutes, bring participants back to the large group. <b>Ask participants to type what they discussed using the chat function. Choose one participant to read out the responses in the chat. Call on other participants to share their experiences verbally by unmuting themselves.</b> Share your personal experience regarding change in the pandemic. The objective is to enable participants to reflect on their own psychological experience of change.</p>



In this comparison of the first 20 minutes of her session, notice how Hilton in the introduction encouraged the participants to use the chat function. By doing this, she accomplished two things: She clarified her expectation of how participants will participate in the virtual setting, and she introduced the specific tool (chat function) they could use to ask questions and give answers. In the next activity, the discussion in pairs was now shifted to a discussion in pairs in a breakout room, which allowed participants the opportunity to express thoughts in a private setting. She then created the space for everyone (introverts and extroverts) to use the chat session and share their feelings. She took it to another step by asking participants to verbally express their thoughts by “unmuting” themselves. Hilton then established a personal connection with participants by sharing her own experience. She brought this personal experience to life by sharing pictures of her family pre- and post-COVID-19.

In other cases, creativity was needed in changing how to present content that seemed, at first, impossible to adapt. Perhaps Fuá Nascimento’s session in the Rockefeller Global Leadership Program is the best example of how to address the same learning objectives while accommodating the lack of in-person interaction. Nascimento’s in-person session brings forth a lively discussion on intercultural difference using physical activities such as dancing and singing. He teaches participants *Capoeira*, which is a Brazilian martial art that combines elements of dance, acrobatics, and music. These activities often make participants uncomfortable at first because of the general unfamiliarity for some students from the U.S. or other cultures of singing in groups and the physical proximity the dance form requires. In addition to the unfamiliarity and the proximity, it also is the very act of letting go—physically, mentally, and emotionally that push participants to be uncomfortable and thus enter the Learning Zone.

In the virtual format, physical closeness was not an option. So, in the virtual adaptation, Nascimento started with a solo performance, which the participants replicated via practicing in front of their own cameras. Further, Nascimento did an excellent job of developing prompts that enabled difficult discussions in breakout rooms about customs and cultural practices that influence individuals and societies. He visited each breakout room while these discussions were taking place.

Nascimento also created space for personal writing and reflection. All these activities made the participants uncomfortable at first, but we could see them becoming more comfortable as the session progressed. The in-person and virtual sessions were necessarily different but met the same objectives. In Table 8.2 is a comparison of evaluations for his in-person and virtual sessions. You can see that participants gave similar feedback despite the difference in format.

**Table 8.2***Evaluations of In-person Versus Virtual Session*

In-Person Session Comments	Virtual Session Comments
<ul style="list-style-type: none"> <li>• How to lean into being uncomfortable.</li> <li>• It pushed me out of my comfort zone.</li> <li>• I loved how uncomfortable it was in the beginning and how comfortable it became. Also, the physical activity was a fun way to focus.</li> <li>• Loved the engagement and enthusiasm!</li> <li>• Good chance to get close with the cohort.</li> <li>• Learned a lot more about Brazilian culture.</li> </ul>	<ul style="list-style-type: none"> <li>• He did great on getting us to relax and open up.</li> <li>• It was very engaging, and I liked the physicality of it. I also liked that it really pushed me outside of my comfort zone.</li> <li>• I like that he forced us to be physically involved.</li> <li>• I liked his energy.</li> <li>• I really enjoyed how he got everyone to tell stories about themselves and shed their armor.</li> </ul>

I have highlighted the positive comments in Table 8.2. Constructive comments for Nascimento’s session mirror what we often observe in the virtual format of delivering content: Limit screen time by shortening a session to “essential-to-know” information and include “good-to-know” information in handouts and required readings, TED Talks, etc.; accept that participants will process their sense of discomfort in different ways, and some will be more uncomfortable than others; understand that not everyone will be comfortable sharing their background in their home.



**Theoretical Grounding:** Kolb’s Cycle of Learning and the Learning Zone Model have for a long time guided us to offer vibrant programs that strike the imagination of facilitators and participants. As we enter into virtual learning, we have had a chance to review their applicability. Much to our joy and satisfaction, we are still able to provide our participants with concrete experiences through which they can analyze, observe, and explain these experiences and apply the learning to their own reality. Our remote programs have endeavored to keep participants in their Learning Zone. Being uncomfortable with new knowledge is a prerequisite to true learning. The biggest area for improvement is to find additional ways to gauge participant responses, because it is hard to see reactions to content that were visible to us in our in-person programming.

Virtual learning and teaching have opened the door for educators and program managers to examine theories and documented best practices for online learning, and it opens the door to facilitators for countless opportunities. Some of them are referenced in this part of the book and support our personal experiences as newcomers to the world of online learning.

The Community of Inquiry (CoI) Model merits attention as we learn more and become better at delivering online programs in our foreseeable future. The CoI Model has three elements (see Handout 8.1).<sup>2</sup> It aims to create an understanding of cognitive and social processes in eLearning



environments. The cognitive element of the model focuses on participant interaction with content: the way in which it is delivered by educators and the ways in which it is received and processed by participants. The social element in the model defines the type of engagement and interaction between participants, as well as the interaction between participants and educators. The third element of the CoI Model is the teaching presence:

...to establish a teaching presence, an instructor must attend to the design and organization of the learning experiences; the design and facilitation of communication and interactive activities occurring between and among students, students and the instructor, and students and the content; and share content/discipline knowledge and expertise through direct instruction.<sup>3</sup>

In thinking about all three elements I have referenced here and, in our effort, to make virtual programs even more responsive to participant needs, I believe we need to pay closest attention to the social element.



**Rigor:** Few of us ever feel like we have all the facts, information, and training necessary to feel prepared to implement a change, particularly if it requires us to make a sudden change. The short turnaround from in-person to virtual programming did not give us the time to research and study the theory and best practices in online learning. We did the best we could. We used crowdsourcing of information amongst ourselves as a team, consulted with other facilitators who were familiar with the programming, and taught ourselves the “essential-to-know” information related to online programming. In retrospect, we learned that the theories and practices that guide our programs still applied. The incorporation of technology and the remote program experience were new. Most of our time was spent in learning how to use it and deploy it as best as we could. We learned many lessons along the way. Perhaps the biggest takeaway for me from this experience was how the need as well as the willingness to adapt kept me in a learning mindset. It also created excitement within me and that generated a positive learning environment for me.



**Community:** Developing community happens in several ways. The Center’s team responsible for implementing co-curricular programs is already a strong unit that is dedicated to implementing meaningful programs. The transition to virtual teaching and learning, however, added another angle to further strengthen our teamwork and community spirit. All of us became engaged disciples in learning how to use Zoom. Tutorials and regular discussions about what works and what does not work permeated our weekly staff meetings. Reading about online learning became a priority, and staff shared timely articles they had read with one another. This built a technology-focused learning community amongst us where we freely shared information and helped each other.

The next challenge was to consider how to build a sense of community in which participants feel supported by each other. I have observed that participant empowerment and growth are multiplied when participants feel that they are part of a community that shares successes and challenges. Everyone is faced with the challenge of trying to establish community in a virtual environment

where members are geographically scattered. This said, it is important to create an intellectually supportive environment that is rigorous, encourages discussions and diversity of thoughts and is inclusive and respectful. To support this environment, we gave participants tools to help with team building, while also giving them the main responsibility for building a community in which they take pride. For example, participants in the First-Year Fellows Program were encouraged to create their own GroupMe, a messaging app where users can send group or private messages from their computer or phone using Wi-Fi. This way, they were invited to take control and ownership over their cohort connection. While we would offer community-building within the time all of us were together, outside of that, they had to put in the time. We made that very clear at the start of the program, we expected them to not only create a GroupMe, but also set up a time to meet virtually on weekends as well. I think that played a part in them becoming a cohort again and gave them an opportunity to get to know each other better.

We learned that assigning group projects is another way to build connections. For example, the First-Year Fellows Program divided participants into smaller self-selected groups to complete a project. As is normal, the groups went through the Tuckman's stages of group development.<sup>4</sup> But not being together physically did not deter them from completing the project. They were given deliberately vague guidelines for the project. We checked in with them and were mindful about not solving all their problems or answering all the questions they had. They simply had to struggle and come up with their own project parameters, the process they would use to complete the project, and the way they would deliver their findings in a paper and a presentation. We saw that participants rose to the challenge and not only completed the projects on time but also had unique insights to share. They also reported that they had become "close" and had established friendships they thought would last beyond the program.

Finally, organizing virtual lunch and dinner meetings and virtual games built a connection between program staff and participants in the First-Year Fellows Program. At the time of this writing, it has been over a month since the program formally ended and participants still reach out to me and the program officer with questions or concerns or even just to say hello.



**Reflection:** Reflection in the virtual format space looked different than it did before, but there were still multiple avenues to explore. In many of the sessions of the program, the chat function was used extensively as one way to provide additional opportunities to reflect among all the participants, which resulted in including those who preferred writing to speaking. Surveys that were sent after the session using Google forms were another tool used to invite participant reflection.

Another way to invite reflection on the content were check-ins with participants, as was done by the program officer responsible for the First-Year Fellows Program. The pre-COVID iteration of the program had only a mid-term check-in with the fellows housed together in Washington, D.C. during their fellowships with alumni mentors. The virtual program, by contrast, now had planned virtual check-ins with fellows throughout their fellowships—individually and in groups. These check-ins helped the program officer to discuss with participants not only how they were applying the content they had learned during the program thus far but also what new skills they were gaining and how they were doing physically and emotionally. As O'Shaughnessy

(2020) says, “Students are more open to learning when they are emotionally and physically regulated, feel connected to others, and have opportunities for meaningful engagement.... Survey your students often on what they need to feel engaged and connected.”<sup>5</sup>



**Assessment and Evaluation:** Of the Eight Pillars, we found that Assessment and Evaluation largely carried over in the transition to virtual programs. The tools that the Rockefeller Center used to conduct participant evaluations were already online, so little changed in terms of resources. Additional evaluations became necessary to determine how the Rockefeller Center was best meeting the challenges of virtual instruction. The program staff asked questions related to participant reactions to virtual learning, structure of sessions, and tools used (polls, breakout rooms, chat) during the sessions. Evaluation, then, expanded its scope to include the tools the Center had at its disposal during its virtual programs.



**Participant Learning and Empowerment:** In-person programs offer the opportunity to observe participants during their learning in a different way. As a facilitator, you think about something they say during a session, notice something that strikes their imagination, and even notice changes in their non-verbal communication. A chance meeting in the corridors where a hurried conversation takes place is yet another way in which you become aware of something in the session that resonated or did not resonate with them. So, how does this work for a remote environment? It places enormous responsibility on the facilitators to connect with participants. However, it is possible; it just takes more time and requires patience. I mentioned the frequent check-ins incorporated into the First-Year Fellows Program earlier. Another example is the Personal Leadership Challenge exercise, in which the program officer for the Management and Leadership Development Program meets with every single participant to discuss the challenge and provide coaching.

These examples create opportunities for building relationships with participants and empowering them to become actively engaged in their own learning. Empowerment, then, becomes an interdependent practice where facilitators encourage participants to chart their own paths both within the sessions and beyond them. I acknowledge that such approaches as the one-on-one check-in and the Personal Leadership Challenge take time and may not seem feasible for institutions that face staffing constraints, have less resources, or have a large number of participants. In such cases, group reflections can save time, or finding a participant or participants who can take the lead and get credit for organizing participant reflection groups might serve as an adaptation to approaches I have described. In all my years of working with communities and now in an academic setting, I have observed that there are always community members or students who are inspired and energized to take an opportunity to lead and give back.

Several examples of how we were able to get participants to become responsible for their own learning are shared in this part of the book. The Civic Skills Training Program described in Chapter 4 encouraged participants to develop a “virtual presence.” In the first session, we discussed with participants their “virtual presence” based on our observations and a screenshot taken during the session. Participants observed such things as someone looking engaged, someone

looking disengaged, or presumably engaged in another activity. Some looked bored while others looked distracted. Some simply looked unhappy. The discussion then progressed to how all these observations could have an unintentional impact on how a person is judged because of their virtual presence. It finally evolved into video log assignments (vlogging activities) where participants themselves identified their goals for developing a virtual presence, a few of which are quoted here:

One thing that I want to focus on is smiling fully. I know that when I smile, after a while it becomes a little weaker and less convincing, so always working on maintaining that full smile! I also really liked the strategy mentioned by one of the groups of pinning the person you are addressing near the camera, so even if you are looking at their image, it appears as though you are making eye contact.

— John K., class of 2023

I will make sure to incorporate more smiling into my talking as well as my listening. I will also work to keep eye contact with the camera and try not to look off screen to gather or recall thoughts.

— Paridhi K., class of 2023

Although it may seem trivial, the First-Year Fellows Program taught me the importance of maintaining a strong Zoom presence. Whether it be fixing my posture, maintaining eye contact, or always having a smile on my face, these small fixes have made a massive difference in the interactions I have with my co-workers. I have also become more cognizant of people who have a “bad” Zoom presence. For example, some of the other interns I work with tend to look at their phones or browse the internet during our meetings. Although I hope I wouldn’t have made those mistakes, I am very thankful to have learned these lessons before my program started.

— Sienna H., class of 2023

Participants were assigned other vlogging prompts subsequently, asking them to reflect upon how they were managing their time, attention, work processes, communication, and expectations during CST and their summer fellowships. They were asked to record videos of themselves discussing elements of the preparatory course and what they expect from their remote fellowship work. Vlogging activities have helped participants to develop their virtual presence by practicing actions such as maintaining eye contact with the camera lens, presenting with engaging nonverbals, and managing their environment with, for example, a clean background, decent lighting, etc.

Finally, understanding information that has stayed with participants after they have completed the program is helpful in evaluating a virtual program. Sienna H., class of 2023, shared these insights with me after she completed the First-Year Fellows Program:

Imposter syndrome is real, but you are not alone. Don’t wait for your co-workers to reach out to you. If you want to build relationships, take on the responsibility of creating them. FYF provides you with an internship. You are in charge of making

it a meaningful and valuable experience from there. People generally want to help you. You just need to reach out. Positivity is often contagious and reciprocated.

And finally... the advice that I have received from FYF reminds me of Maya Angelou's quote: "People will forget what you said, people will forget what you did, but people will never forget how you made them feel."

## Practical Tips for Facilitating and Helping Others to Facilitate

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In this part of the book, I focus entirely on tips for those who are using their talents to design and facilitate eLearning experiences. So much of this has been learned through experience, and I refer to many authors who have provided wisdom through their writings.

**Mindset:** Most of us did not choose to work from home. It just happened and took us by surprise. Many of us have not had the time to truly reflect on the impact of COVID-19 in our personal lives. By all accounts, this situation may not change soon. So, we need to adopt a "growth mindset," as Carol Dweck (2007/2006) would say.<sup>6</sup> We also need to develop our own personal strategy to bring out the entrepreneur within us. I have found that creating a systematic personal and professional development plan and carving out a set amount of time in a week, month, or any defined period helps immensely. If you are a manager, help your team to do this as well. It takes a toll to navigate uncertainty and ambiguity, but telling yourself, "I don't know, but I'll figure it out" can be of immense comfort.

**Self-Care:** These are difficult times for all of us. One time or another, my colleagues and I have complained about Zoom fatigue and have preferred to just talk on a phone. It is important to acknowledge this fatigue and, at the same time, develop plans to address it. Quick breaks, deep breaths, meditation, taking short walks, using a standing desk, drinking lots of water, journaling, and spending time with family and people you care for are a few simple ways that help combat this fatigue. Since we need to support others, we need to take care of ourselves to be in the best physical, mental, and emotional state. So, "secure your own safety belt first," as Krause (2020a) would say.<sup>7</sup>

Participants are able to sense when you are stressed or overwhelmed even during an online learning experience. O'Shaughnessy (2020) notes, "Struggling to find files, links, or browser tabs can cause your stress level to rise, which students will feel and mirror. Close any programs that you won't be using and print out your agenda so that you don't need to frantically search for it on your screen." She further invites facilitators to share their reasons for feeling stressed with participants, as it only serves to humanize the facilitator-participant relationship.<sup>8</sup>

**Involve Participants:** Different ways of empowering participants and building community have been described earlier in this part of the book. This observation from Stachowiak (2019) strikes me:

The role of a teacher is more than presenting concepts and having students present those same ideas back to us at some future time. By having students engage with

each other in classes, the richness of the interactions increases, and the learning deepens. Make student-to-student interaction more personable by making it easy for them to engage with each other, rethinking discussion boards, and using video for conversations.<sup>9</sup>

Another interesting way to engage participants in their own learning is to ask them to articulate their own objectives for the program.<sup>10</sup> You can then analyze themes from those responses and include the student-generated learning objectives in your session plans.

**Deal with Participant Discomfort:** I described the high points of Fuá Nascimento's session under "Structure" in this part of the book. We also received constructive comments for his session and these comments mirror what we often observe in the virtual format of delivering content. This is an important lesson from this session. We must accept that if we want participants to be in the Learning Zone, they will process their sense of discomfort in different ways, and some will be more uncomfortable than others. Help participants reach their Comfort Zone about information that makes them uncomfortable. This may mean additional time spent with the participants, but every minute is worth it! Understand that not everyone will be comfortable in sharing their background in their home and that standing up to practice in a session that requires physical moves needs to be accommodated in other creative ways.

**Support Participants:** Encourage participants and support them to carry momentum forward. Holding an attitude of accountability also means understanding the challenges participants face and, at the same time, creating a space for building relationships. A facilitator received this message shortly after the last session in one of the programs offered by the Center:

Thank you so much for everything this summer! It's crazy to think we still haven't met in person yet, and I'm looking forward to the day I can finally see you in real life. Your constant support, wonderful stories, and general presence have been a massive help, comfort, and joy throughout the FYF program. You always make me smile on our Zoom calls, and I'm genuinely looking forward to getting to know you better over the next few years. Thanks again for everything.

This participant hopefully realizes how uplifting such a message has been for the concerned facilitator as well! Krause (2020b) describes the impact on relations as the necessary catalyst for learning: "The number one focus is connection. Participants need to feel connected to you as a facilitator of the learning. Online learning is most effective when everyone belongs. It hinges on relational trust, and your job, in part, is to keep the foundation on safety and inclusion."<sup>11</sup>

**Use Humor as a Tool:** We also recognized how important it is to use humor as a tool and a way of helping everyone to relax. While including humor and not taking yourself too seriously are important for in-person sessions, creating space for it in a virtual setting really lightens the environment. I also think it makes the space open to learning, particularly because the barrier of traditional authority evaporates, and participants can personally relate to you.



**Creative Engagement:** Think creatively about ways of engaging participants (introverts versus extroverts), in addition to the methods you are comfortable with. It is important to be inclusive. Use chat sessions and other reflective activities. Short breaks help to alleviate the strains of extended screen time. Either give them a chat session with goals or give them a break in the middle. You could also give them an activity to think about for the following week. Also, consider group projects to build community as described earlier.

**Invite Co-Creation:** Participants' investment in design enhances their virtual experience. For example, throughout the process of redesigning the First-Year Fellows Program (FYF), we invited participants to help. The opportunity to network with alumni in the Washington D.C. area is a key benefit of FYF, and we did not want to lose that aspect of the program. However, we had difficulty imagining how networking might happen. With participants in the mix, we developed and piloted a networking session with session participants and former First-Year Fellows. Afterwards, fellows, past and present, provided us with constructive feedback, which in turn, allowed us to craft the official networking session with alumni.

This example above explains the idea of prototype testing. Chawla (2015) suggests including prototyping for developing a course, and I believe this advice also applies to developing a co-curricular program. He says:

An additional benefit of prototype testing is that it will help you identify expert blind spots in your course. Learning scientists classify expert blind spot as the inability of some instructors to make accurate predictions about the difficulty level of new ideas as perceived by their learners. In other words, experts are sometimes unable to recall what it feels like to be a novice and are unaware of the difficulties a beginner experiences with their subject. Prototype testing the course in the design stage can help you identify such spots.<sup>12</sup>

**Make Information Easily Accessible:** Be clear about where information from your program can be located. “When students use a lot of cognitive resources just trying to figure out where to go to access readings, videos, discussions, or quizzes, they have little mental energy left for the content itself. Discouraged and/or irritated students are less likely to learn.”<sup>13</sup> I have found this to be true even for myself. Taking the time to organize information and letting participants know where it can be found saves a lot of irritation in the long run.

## Technology Considerations for Synchronous Sessions

How to use technology appropriately and effectively has been the largest area of growth for us. I hope this section helps you to think about how you are using technology to support your objectives and also sparks other ideas as well. While this has been written based on lessons learned in an academic setting, the lessons apply for meetings in any other organizational setting. Also, although I have described our experiences with Zoom here, please look for the same or similar features in the platform you are using.

**Start Time:** We have observed that it takes 2–3 minutes for everyone to get logged in and get settled. If starting a session at 1:00 pm with an end time of 2:00 pm, you will likely have to wait until 1:03 pm before getting started. Based on what we learned, all Rockefeller leadership programs are going to invite participants to arrive five minutes early for a prompt start time.

**Communication Takes Longer:** Always keep in mind that communication takes longer over a virtual platform, so sessions will extend in length. We don't have the in-person social cues to know if we should talk, ask a question, add on to an idea, etc. If a session normally takes you 1.5 hours, it will likely take 2 hours. Either cut or adjust content or extend time, although the latter is not advised. If your session exceeds 1.5 hours, build in a break from the screen or a group stretch. Build in some flexibility in your sessions and do not plan your session so tightly for the planned hour that it cannot accommodate any unexpected discussions that may take longer.

When you plan out your session, add another column for “technical directions” (for example, “screen share here,” “have participants enter in the chat”). Incorporating such prompts into the lesson plan will help you estimate time.

**Screen Time:** Please limit screen time by shortening a session by focusing on “essential-to-know” information and include “good-to-know” information in handouts and required readings, TED Talks, etc.

**Introductions:** Have participants introduce themselves. This helps them feel like they are part of the session and not an observer. Getting them to unmute right off the bat lowers the perceived risk of unmuting later. However, call on them by name to save time and reduce anxiety. If there are too many participants, use breakout groups for introductions.

**Seek Help:** We learned that it is helpful for facilitators to focus on the content and delivery of the session but have assistance in running the technology aspect of the session. In our case, the program officers and student assistants helped to organize breakout rooms, the chat function, and polls. The practice sessions before the actual sessions helped the facilitator and those who were assisting with the technology component. But what can those in institutions with fewer resources do to incorporate this structure? As one option, consider how to use participants who are comfortable with technology and invite them to assist you with the session. They can be co-creators of the sessions with you, a process that could engage you and them alike in creating a vibrant session.

**Screen Share:** With Zoom specifically, it takes a minute to set up screen share. It can be difficult to navigate between screens during screen share. Practice becoming comfortable toggling between screens. Further, as the person using the screen-share function, you can see only four video pictures at a time. Others watching your screen can expand their gallery view to show more video feeds. If you are asking a question, your participants can't see each other to get social cues and will not answer (or ask a question of their own). Have them raise their hands virtually or use the chat. Finally, if you want to share a video with its audio, there is a box you need to check that says, “share computer audio.” Do not mute yourself when you are screen-sharing with audio! This will also mute the audio you are playing for all the other attendees.

**Learn to Use Breakout Rooms:** When you divide participants into breakout rooms, you lose the ability to talk to them all at once to clarify instructions. This is different from facilitating a session in a classroom in which you have the advantage of interrupting discussions and clarifying instructions to the group. Therefore, it is essential to have clear written instructions accessible for participants when they are in their breakout rooms.

You can even have them record their answers into the same Google doc, as Minero (2020) describes of Tahmaseb, a teacher: “[He] divided his students into Zoom breakout rooms, had them ‘record their answers on a shared Google doc’ to a class-wide prompt, then had volunteers share out their responses to the whole class.”<sup>14</sup> We have practiced several variations of this idea of using Google Docs in breakout groups and found that it works because it allows participants to discuss, record information, and share it with others efficiently and effectively. It also allows us as facilitators to keep a record of conversations that we can analyze later. To ensure clarity, test the instructions with someone before you use them in the session.

Breakout rooms mimic the in-person, small-group discussion format. In such a format, a facilitator could simply walk by and clarify questions or concerns the group had. Since this was not possible in a virtual format, breakout rooms provided the opportunity for participants to review the material they had just learned in a relaxed format without the presence of a facilitator. Participants could interact with each other to “dive deep” into the topics discussed during the session. In so doing, they were able to establish bonds that lasted throughout the program. The facilitator could also “drop in” virtually to see how discussions were progressing.

Breakout rooms are effective as we see in these observations from participants from the First-Year Fellows Program:

I think the breakout rooms are the most effective way to do most ice breakers. As much as I want to get to know all of the fellows and program coordinators, it takes a lot of time to share even a small amount of information if each person is sharing one at a time. By doing random breakout rooms, we can interact with others more meaningfully and (eventually) get time with everyone.

— Isabella D., class of 2023

I really enjoyed the breakout rooms because I was able to be relaxed and have meaningful conversations with a small group of people.

— Natasha R., class of 2023

I really enjoyed the breakout rooms; it was neat getting to know some of my classmates better and I think the smaller group setting was conducive to deeper, easier discussions.

— Joshua E., class of 2023

**Security:** If you are running the sessions, or being assisted by someone else, have a conversation about making the session as secure as possible. We learned the need to understand the importance

of being alert about security features for our guests and participants the hard way. It took only one unpleasant “Zoom bombing” incident in one of our programs to pay even closer attention to security considerations.

**Choosing Technology:** When deciding on what technology tool or platform you’re going to use for your virtual program, it’s important to consider your audience in the decision. What is their exposure and comfort with that tool or platform? Do they use it often like our participants used Zoom, for instance? Is it new to them, like our participants in the First-Year Fellows Program who used Microsoft Teams? If the platform is new to them, deeply consider if this is the right path for you. If you feel a tool or platform is right for you, develop some instructional videos, training, and reminders to facilitate the adoption process. Training is a must, even if you’re working with Generation Z, the digital natives. Being familiar with technology does not make them experts in every tool or platform.

You and your learners can take advantage of external tools such as headphones, lights, external webcams, and other items you can think of to create a good working environment.

**Becoming Comfortable with the Technology:** Having access to technology does not equate to knowing how to use it. Our team devoted intentional time to practicing, prototyping, and iterating. We hosted practice sessions with speakers, relied on knowledge sharing, and created prototype Microsoft Teams and Google Classrooms. A team’s willingness to explore and embrace technology leads to their ease with it. Use it to its fullest!

**Being Kind to Yourself:** Unprecedented times have created an unforeseen situation. Leadership must not only be about transmitting what you know, it must also be about admitting what you do not know. Virtual sessions ask all of us to embrace the uncertainty, and with speakers, doubly so, as they are confronting both the challenges of a new format and a way to fit their material into that format. So, learn about how you will adapt your course or program design, imagine how you will engage participants for maximum learning, and learn the technology yourself or get the support of others who can help you with implementing the technology component. Rest easy in the knowledge that mistakes will be made and are part of the learning curve. We made many mistakes while we were learning about technology and implementing it. We were surprised at how supportive our participants were and even more delighted when they stepped up to help us navigate a technological challenge.

## Concluding Thoughts

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The COVID-19 pandemic has devastated us in so many ways, but it has also provided us with an environment ripe with learning. If it had not happened, “business as usual” would have prevailed, and we would not have realized so many insights in such a short period of time. It has unleashed our latent creativity and fostered an environment in which both facilitators and learners shared an experience they are not likely to forget—now or ever. I was also surprised and energized with the connections my program officers and I built with our participants.

Personally, I was humbled with how much I learned in a short period of time and how much more there is to learn as I continue to explore the world of online learning. Please use the references at the end of this chapter to add to your knowledge and your toolkit.

One final note must be made about the opportunities for keeping morale high when it was difficult to foster relationships. A huge and lasting lesson I learned is that, as a manager, it is my responsibility to create and relish moments of joy for myself and for others, despite the unpredictability of our current situation. It is on me to reach out to people and address the isolation and loneliness when it begins to surface. We can create spaces in which our participants can enjoy each other's thoughts and company. I come back to the simple yet delightful breakout room as an example. We have demonstrated already how breakout rooms were important to generate more intimate connections in a time where loneliness ran high; as one participant stated, "I enjoyed having the ability to connect with peers during a time of such disconnect."

I want to share a realization from this experience of putting my thoughts about the transition to virtual learning into words for your consideration. When reading this chapter, a colleague was confused about what these terms (supporting participants, participant involvement, creative engagement, and co-creation) really meant. In her mind, they were either similar or the same. What I really want to convey is that there is something deeper happening. By supporting participants, we are giving and receiving emotional support to weather an extraordinary situation created by the pandemic with which none of us is familiar. By creating spaces for participant involvement, we are creating agency within participants to own the programs and own their own learning. When I refer to creative engagement, I am thinking about honing into facilitators' and participants' sense of creativity and innovation for engagement. The act of co-creation helps facilitators and participants develop an idea or product (e.g., the alumni networking session referenced earlier). All these interactions, used together in the implementation of programs, create energy and inspiration in participants and facilitators alike.

## Notes

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<sup>1</sup> Garrison et al., 2000.

<sup>2</sup> Garrison et al., 2000.

<sup>3</sup> Dunlap et al., 2016, pp. 146.

<sup>4</sup> ProjectPM., 2020.

<sup>5</sup> O'Shaughnessy, 2020.

<sup>6</sup> Dweck, 2006.

<sup>7</sup> Krause, 2020a.

<sup>8</sup> O'Shaughnessy, 2020.

<sup>9</sup> Stachowiak, 2019.

<sup>10</sup> Chawla, 2015.

<sup>11</sup> Krause, 2020b.

<sup>12</sup> Chawla, 2015.

<sup>13</sup> Darby, 2019.

<sup>14</sup> Minero, 2020.

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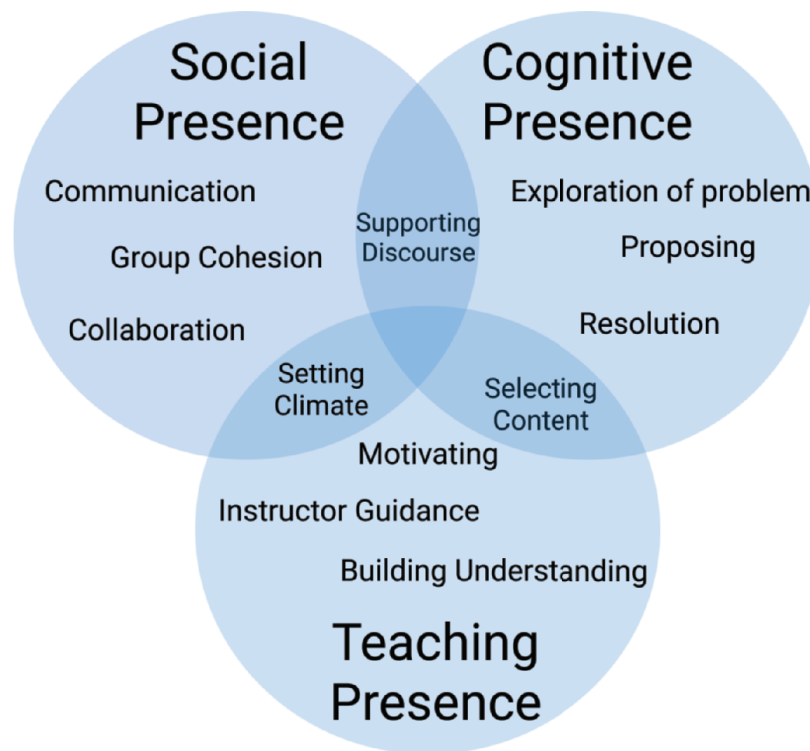
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# Community of Inquiry Model



*Note:* Adapted from “Critical Inquiry in a Text-Based Environment: Computer Conferencing in Higher Education” by D. R. Garrison, T. Anderson, & W. Archer, 2000, *The Internet and Higher Education* 2(2–3), p. 88. Copyright © 2000 by Elsevier Science Inc.

The Community of Inquiry Model (CoI), developed by D. Randy Garrison, Terry Anderson, and Walter Archer, and published in 2000, is in essence a framework of the learning process as a constant interaction among three dimensions applicable for in-person and online environments.

The *Social Presence* dimension considers the person’s ability to project their personality with the aim of developing relationships and communicating in different environments. This is why experiences closely related to this element of the model are encouraging interactions with others and seeking opportunities to express personal views.

Equally important is the second dimension, *Cognitive Presence*, which revolves around the goal of making sense of oneself and the environment through consistent reflection. This dimension is closely related to experiencing and overcoming confusion or uncertainty, making connections, and integrating new ideas within one’s thought process.

The third dimension, *Teaching Presence*, is built upon the concepts of facilitating social and cognitive processes with the aim of producing worthwhile and meaningful learning. Its key elements are all related to practices that educators implement, such as initiating discussions, proposing and defining ideas, and maintaining focus throughout verbal communication.

There are many practices that can amplify the benefits that each dimension brings to the learning process; however, within an online environment it might seem harder to apply all of them. Below is a list of activities that educators can engage in—even in virtual settings—to create a community of inquiry.

## Social Presence

- Project the teaching persona through constant communication with the students.
- Provide opportunities for office hours as a way for interacting with students one-on-one.
- Rely on icebreakers and similar activities to encourage students to project their personalities in a less academic setting.
- Integrate sharing personal anecdotes as a part of weekly check-ins to encourage students to feel connected even when physically distanced. Encourage students to share related anecdotes, experiences, and beliefs in online discussions.

## Cognitive Presence

- Pose open-ended questions as a tool to promote a variety of perspectives and deep thinking.
- Encourage peer-review as a process of providing feedback and acquiring a sense of confidence about one's impact on others.
- Rely on a diverse set of activities for the acquisition of the same set of skills to illustrate the multiple applications of concepts.
- Provide opportunities for experimentation and creative thinking utilizing online-based visualization platforms.

## Teaching Presence

- Provide students with enough information on expectations.
  - Spend sufficient time on resource-utilization and ensure that all students feel confident in working with online programs.
  - Rely on visualization during class activities and text-based resources for out-of-class work to maintain attention and diversify the learning experience.
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*Handout created by Kristabel Konta, class of 2024*