

# **Roles and Competencies Needed to Implement Online Academic Programs in Tertiary Education**

**Based on a competency study completed in 2000  
and published in 2003.**

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## **Roles and Competencies Needed to Implement Online Academic Programs in Tertiary Education**

The following is based on research done by Peter Williams.<sup>1</sup> This document will utilize the results of that competency study but will not include methodological explanations. A copy of the article is available from the author upon request.

Implementing an online academic program requires that existing roles be extended through the acquisition of additional competencies. The addition of online programs requires a transformation of the way all services are provided. Instructional services are provided by instructors and those that support instructors such as instructional designers. Instructional materials, starting with textbooks and including instructor-developed materials, must be provided to online students. Student support services which are traditionally campus based must be extended to provide access for online students. While the extension of all these services to support online learners may require that additional positions be created, it definitely requires that existing personnel acquire the competencies necessary to modify and extend their services for online learners.

In order to make staffing decisions, the roles included here must be compared with the available personnel and skills on campus to determine which of the roles cannot be covered with existing staff. Those that cannot be covered will have to be filled either through the creation of new positions, through reorganization or through outsourcing.

### **For each of the roles, the following questions must be answered:**

1. Is there someone on campus that has the skills and knowledge to fulfill this role?
2. Does that person have the time to take on the extra duties entailed in the project? How much time will be needed?
3. If there is no one available to cover a particular role, what are the staffing options?
  - 3.1. Create a new position
  - 3.2. Reorganize existing personnel
  - 3.3. Outsource
  - 3.4. Other

### **The following points should be considered:**

1. One role does not necessarily equate to one person or position or position title. Most employees function in a variety of roles.
2. One role can be divided among two or more people if there is close coordination among them.
3. Some competencies may not be present at OWU right now, but they can be accomplished through training of existing personnel.

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<sup>1</sup> Williams, P. (2003). Roles and Competencies for Distance Education Programs in Higher Education Institutions. *The American Journal of Distance Education* 17(1), 45-57.

4. There are some competencies that all staff involved in the project will need to master. (See general competencies at the end of this document.)
5. The integration of online learning into existing organizational structures should be a goal of the university. We will see the gradual adoption/integration of online learning into curriculum and into teaching; indeed it has already begun. As we see this adoption, the need for an organizational unit dedicated to online learning will diminish. At the same time, the competencies related to online learning (general competencies) will be needed by personnel across campus.

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## **Administrative Manager**

The role of administrative manager supports distance learning staff by ensuring resources and distance learning related support services are available. This role assumes most of those functions associated with management such as balancing the budget, hiring and firing, and the coordination of resources. The competencies associated with the administrative manager are those general competencies needed by all the roles (included here and in separately at the end of the document) as well as seven role specific competencies: advising/counseling skills, budgeting skills, general education theory, managerial skills, marketing skills, policy-making skills, strategic planning skills.

<b>Role Description:</b> Manages and ensures resources and DL related support services are available; supports DL staff.	
<b>Outputs</b>	<b>Competencies</b>
Manage/supervise DL staff & operations	Basic Technology Knowledge
Balance budget	Budgeting
Advocates and oversees marketing DL courses/programs	Collaboration/Teamwork
Ensure evaluation processes are in place	Organizational
Ensure all support services are in place	Planning & Strategic Planning
Select and hire DL personnel	Knowledge of online learning field
Ensure students receive learning materials & resources	Managerial
Monitor program development/ compliance	Public Relations & Marketing
Coordinate with academia and industry	Interpersonal Communication
Inform students of available classes	Negotiation
Possess basic understanding of technology	Policy-Making
Ensure student needs assessments are conducted;	Project Management
Oversee registration and scheduling organizes varied training opportunities for faculty to prepare them for teaching at a distance.	Change Agent
	Facilitation of Discussion
	Knowledge of Intellectual Property, Fair Usage & Copyright Regulations)
	Knowledge of Support Services
	Writing & Editing
	Adult Learning Theory
	Consulting
	Evaluation
	General Education Theory
	Questioning & Feedback
	Advising/Counseling
	Development of Collaborative, Student Focused Learning Environment
	Needs Assessment & Data Analysis
	Presentation
	Group Process

## **Leader/Change Agent**

Complementing the administrative manager, the role of leader/change agent includes tasks that require looking to the future, model development and organizational change. The outputs and competencies of these two roles overlap a great deal. A possible reason for this overlap is that in spite of their being quite distinct roles, in previous competency studies and often in practice these two roles are assumed by the same person. The person functioning as leader/change agent leads distance learning staff and the institution in change processes and serves as a liaison with other university departments.

<b>Role Description:</b> Leads staff and institution in change processes; serves as liaison with other university departments.	
<b>Outputs</b>	<b>Competencies</b>
Manage/supervise DL staff & operations	Change Agent
Balanced budget	Collaboration/Teamwork
Advocacy and marketing of DL programs	Interpersonal Communication
Development of collaborative models and promotion of teamwork	Organizational and Managerial Planning
Contribution to DL policy/standard	Public Relations and Marketing
Plan for optimal & future use of technology	Consulting
Act as an organizational change agent	Facilitation of Discussion
Selection and hiring of DL personnel	Knowledge of online learning field
Coordination with academia and industry	Negotiation
Positive relationships with other groups/entities	Presentation
Appropriate use of technology	Questioning & Feedback
Provision of faculty/student orientation to DL	Evaluation
Communication of results to DL community	General Education Theory
Provision of support to academic programs in the selection of DL courses	Policy-Making
	Strategic Planning
	Writing and Editing
	Adult Learning Theory
	Data Analysis
	Group Process
	Knowledge of Support Services
	Basic Technology Knowledge
	Development of Collaborative, Student Focused Learning Environment
	Software
	Technology Access Knowledge
	Learning Style and Theory
	Modeling of Behavior/Skills
	Needs Assessment
	Project Management
	Advising/Counseling
	Knowledge of Intellectual Property, Fair Usage & Copyright Regulations

## ***Instructor/Facilitator***

The instructor/facilitator designs content as the subject matter expert in coordination with the instructional designer, delivers and facilitates instruction, tutors, and monitors student performance. Not surprising, competencies related to pedagogy top the list: Adult Learning Theory and Skills in the Development of Collaborative, Student Focused Learning Environment. Of note among the outputs are well organized and clearly stated course expectations and time management along with the appropriate use of technology to create a positive learning environment.

<b>Role Description:</b> Designs content as the subject matter expert, delivers/facilitates instruction, tutors, and monitors student performance.	
<b>Outputs</b>	<b>Competencies</b>
Clear & well organized course expectations	Adult Learning Theory
Manages time to deliver well prepared course	Development of Collaborative, Student Focused Learning Environment
Environments that facilitate learning using technologies appropriately	Content Knowledge
Expertise in subject matter	Advising/Counseling
Clear learning outcomes/objectives	Collaboration/Teamwork
Warm and enthusiastic learning environment	Facilitation of Discussion
timely student feedback that encourages learning	Interpersonal Communication
Facilitation of information presentation	Teaching Strategies/Models
Utilization of technology in a competent manner	Writing and Editing
Monitoring and evaluation of student performance	Basic Technology Knowledge
Collaboration with technical/support staff	Questioning & Feedback
Provision of a variety of learning activities	General Education Theory
Ongoing interactive discussions with students	Learning Style and Theory
responsiveness to audience learning styles/needs	Internet Tools for Instruction
Encouragement of peer learning	Evaluation & Needs Assessment
student advisement and counseling	Planning Presentation
Collaboration in instructional design effort	Instructional Design for Interactive Technologies
guidance regarding student support services	Knowledge of online learning field
Facilitation of guest "experts" at a distance	Knowledge of Intellectual Property, Fair Usage & Copyright Regulations
	Library Research
	Modeling of Behavior/Skills
	Media Attributes Knowledge
	Organizational
	Project Management
	Group Process
	Instructional Design
	Knowledge of Support Services
	Data Analysis
	Software
	Technology Access Knowledge

## ***Instructional Designer***

The instructional designer works with the instructor to design online courses, providing knowledge and application of instructional and learning theories. The person in this role also manages course development projects for timely delivery. He/she may also coordinate graphics and multimedia development for the course.

<b>Role Description:</b> Works with instructor to design courses, taking into consideration the media; Manages course development projects for timely delivery	
<b>Outputs</b>	<b>Competencies</b>
Well designed courses for DL environment	Adult Learning Theory
Course design that work with technology	Development of Collaborative, Student Focused Learning Environment
Incorporation of variety & interactive segments	Instructional Design for Interactive Technologies
Appropriate evaluation and data gathering methods included to support both student learning and course/program evaluation	Instructional Design
Promotion of teamwork in course design process	Media Attributes Knowledge
Revision of existing courses to fit DL environment	Basic Technology Knowledge
Integration of support services.	Collaboration/Teamwork
	Writing and Editing
	Interpersonal Communication
	Knowledge of Intellectual Property, Fair Usage & Copyright Regulations
	Multimedia Knowledge
	Internet Tools for Instruction
	HTML Authoring
	Knowledge of online learning field
	Learning Style and Theory
	Teaching Strategies/Models
	Evaluation
	Graphic Design
	Organizational
	Questioning & Feedback
	Software
	Text Layout
	Web Related Programming
	General Education Theory
	Group Process
	Knowledge of Support Services
	Project Management
	Technology Access Knowledge
	Consulting
	Facilitation of Discussion
	Planning
	Presentation
	Change Agent

## ***Technology Expert***

The technology expert works on the design team to ensure effective selection and implementation of technology to support instruction. The person in this role also works collaboratively with the instructor to ensure smooth operation of existing technology that may include a variety such as computers, networks, multimedia, and more.

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**Role Description:** Works on design team to ensure effective selection and implementation of technology to support instruction; Works collaboratively with instructor to ensure smooth operation of existing technology which may include computer networks, telephones or other technology.

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<b>Outputs</b>	<b>Competencies</b>
Cooperative working relationship with instructors & inst. Designers	Computer Hardware
Smooth operation of technology	Computer Networking
Advise in selection of technology for DL	Collaboration/Teamwork
Management of technology set-up and linkages	Media Attributes Knowledge
Evaluation of effectiveness of technology	Technology Operation/Repair
Translation of technical terminology to lay terms	Basic Technology Knowledge
Analysis of instructional advantages of media	Software
Assessment of future changes in technology	TV Satellite Communication
Provision of orientation/training on technology	Multimedia Knowledge
Helpdesk functions & Student technical support	Web Related Programming
	Development of Collaborative, Student Focused Learning Environment
	Engineering
	Knowledge of online learning field
	Technology Access Knowledge
	Questioning & Feedback
	Telephone System Knowledge
	Training for Technology
	Internet Tools for Instruction
	Interpersonal Communication
	Planning
	Project Management
	Consulting
	HTML Authoring
	Knowledge of Support Services
	Presentation
	Facilitation of Discussion
	Change Agent

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## **Site Facilitator/Proctor**

The site facilitator/proctor serves as a liaison and primary contact between the university and geographical cohorts of students; this person can also proctor exams. If geographical cohorts are not part of the plan, this role is not needed.

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<b>Role Description:</b> Serves as test proctor and liaison between university and remote site, proctoring exams.	
<b>Outputs</b>	<b>Competencies</b>
Assistance of students in learning at remote sites	Basic Technology Knowledge
Primary contact between central organization and remote site	Interpersonal Communication
Distribution and collection of material/assignments	Collaboration/Teamwork
Proctoring of tests and exams	Knowledge of Support Services
Proper preparation of remote site	Technology Access Knowledge
Operational and accessible equipment at remote site	Advising/Counseling
Feedback to faculty and home campus on student needs within a course and community needs for programs & services	Computer Hardware
Solution of onsite problems	Facilitation of Discussion
	Public Relations
	Questioning & Feedback
	Technology Operation/Repair
	Telephone System Knowledge
	TV Satellite Communication
	Writing
	Development of Collaborative, Student Focused Learning Environment
	Computer Networking
	Engineering
	Knowledge of DL Field
	Organizational
	Software
	Media Attributes Knowledge
	Internet Tools for Instruction

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## **Support Staff**

The person functioning as support staff coordinates student distant support services such as registration, textbooks and document delivery. The top competencies needed in this role are related to communication and interpersonal skills. Also necessary are Knowledge of Support Services and Organizational Skills. These competencies may be spread throughout various support departments that already exist. Generally, the provision of online services in all support areas of the university will not only serve the online learner but will improve the quality and access to services for *all* students.

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<b>Role Description:</b> Coordinates student distant support services such as registration, textbooks and document delivery.	
<b>Outputs</b>	<b>Competencies</b>
Coordination of support services issues	Advising/Counseling
Communicate class schedule to students	Collaboration/Teamwork
Registration of students for online classes	Interpersonal Communication
Electronic communication with students and staff	Knowledge of Support Services
Student advisement when appropriate	Organizational
Tracking of lessons	Public Relations
Answering phone	Writing
Knowledge of registration, admissions, and financial aid	Basic Technology Knowledge
	Consulting
	Questioning & Feedback
	Knowledge of online learning field
	Group Process
	Knowledge of Intellectual Property, Fair Usage & Copyright Regulations
	Negotiation
	Planning
	Technology Access Knowledge

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## **Librarian**

The librarian provides assistance in use of library and electronic resources and provides skills training to students. Electronic resources such as web linked databases are increasingly common and fall under the purview of the librarian.

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<b>Role Description:</b> Provides assistance in use of library and electronic resources; provides skills training to students.	
<b>Outputs</b>	<b>Competencies</b>
Access for DL students to full text retrieval, proxy servers, online reserves, electronic databases	Library Research
Provision of library and related resource assistance to DL students	Knowledge of Intellectual Property, Fair Usage & Copyright Regulations
Provision of library skills training for students	Knowledge of Support Services
Assistance with searches/research of library, WWW, electronic resources	Questioning & Feedback
Delivery of library materials to DL students	Collaboration/Teamwork
Maintenance of web page with links to electronic resources	Interpersonal Communication
	Adult Learning Theory
	Basic Technology Knowledge
	Media Attributes Knowledge
	Public Relations
	Writing
	Advising/Counseling
	Development of Collaborative, Student Focused Learning Environment
	Knowledge of DL Field
	Technology Access Knowledge
	Consulting
	Facilitation of Discussion
	Organizational
	Internet Tools for Instruction

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## **Technician**

The person functioning as technician keeps the equipment in proper functioning condition, provides training and responds to questions. This role requires the expected technology skills as well as Interpersonal Communication and Collaboration/Teamwork skills.

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<b>Role Description:</b> Keeps equipment in proper functioning order; provides training and responds to questions.	
<b>Outputs</b>	<b>Competencies</b>
Functioning equipment	Basic Technology Knowledge
Support for computer and/or video networks	Computer Networking
Demos, manuals & training for users when needed	Technology Operation/Repair
Timely and informative response to users' questions & problems	Computer Hardware
Periodic equipment tests	Engineering
Timely equipment upgrades	Technology Access Knowledge
Working relationship with technology expert role	Interpersonal Communication
	Software
	Telephone System Knowledge
	TV Satellite Communication
	Collaboration/Teamwork
	Knowledge of DL Field
	Knowledge of Support Services
	Internet Tools for Instruction
	Web Related Programming
	Public Relations
	Questioning
	Training for Technology

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## ***Evaluation Specialist***

The person functioning as evaluation specialist works in coordination with all staff to design and implement research for program evaluation and improvement. The evaluation expert also works closely with instructor to develop instruments and processes appropriate for promoting learning and tracking student progress in the online learning environment.

<b>Role Description:</b> In coordination with all staff, designs and implements research for program evaluation and improvement; works closely with instructor to provide instruments and process appropriate for promoting learning and tracking student progress in the online environment	
<b>Outputs</b>	<b>Competencies</b>
Tools and evaluation instruments that facilitate learning in DL environment	Data Analysis
Monitoring of program successes & problems	Evaluation
Consultation with instructor on evaluation	Adult Learning Theory
	Questioning & Feedback
	Collaboration/Teamwork
	Interpersonal Communication
	Knowledge of online learning field
	Needs Assessment
	Writing & Editing
	Development of Collaborative, Student Focused Learning Environment
	Consulting
	General Education Theory
	Learning Style and Theory
	Basic Technology Knowledge
	Media Attributes Knowledge
	Advising/Counseling
	Facilitation of Discussion
	Instructional Design
	Knowledge of Support Services
	Organizational Planning
	Instructional Design for Interactive Technologies
	Multimedia Knowledge
	Strategic Planning
	Teaching Strategies/Models
	Technology Access Knowledge

## **Graphic/Multimedia Designer**

The graphic designer designs layout of graphical elements in accordance with instructional goals and general education/learning theory.

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<b>Role Description:</b> Designs layout of graphical elements and web pages in accordance with instructional goals and general education/learning theory.	
<b>Outputs</b>	<b>Competencies</b>
Attractive clear page layout	Multimedia Knowledge
Materials that facilitate learning	Basic Technology Knowledge
Quality graphics for delivery media whether print, video or electronic publishing	Graphic Design
Animations that clarify concepts	HTML Authoring
Quality multimedia including video and audio that is accessible to online learners	Instructional Design for Interactive Technologies
	Media Attributes Knowledge
	Writing & Editing
	Instructional Design
	Software
	Adult Learning Theory
	Interpersonal Communication
	Presentation
	Text Layout
	Knowledge of online learning field
	Web Related Programming
	Collaboration/Teamwork
	Knowledge of Intellectual Property, Fair Usage & Copyright Regulations
	Learning Style and Theory
	Questioning & Feedback
	Technology Access Knowledge
	Internet Tools for Instruction
	Development of Collaborative, Student Focused Learning Environment)
	General Education Theory
	Consulting
	Group Process
	Teaching Strategies/Models

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## **Trainer**

The trainer develops and implements professional development for faculty and staff and serves as an advisor to other staff in design and provision of training.

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<b>Role Description:</b> Develops & Implements professional development for faculty/staff; serves as advisor to other staff in design and provision of training..	
<b>Outputs</b>	<b>Competencies</b>
Training materials for faculty	Basic Technology Knowledge
Learning environments that facilitate adult learning	Collaboration/Teamwork
Training that accomplishes program goals	Presentation
Performance gap analysis	Adult Learning Theory
	Facilitation of Discussion
	Learning Style and Theory
	Change Agent
	Development of Collaborative, Student Focused Learning Environment
	General Education Theory
	Group Process
	Interpersonal Communication
	Knowledge of online learning field
	Questioning & Feedback
	Teaching Strategies/Models
	Training for Technology
	Modeling of Behavior/Skills
	Planning
	Writing & Editing
	Consulting
	Evaluation & Needs Assessment
	Knowledge of Intellectual Property, Fair Usage & Copyright Regulations
	Multimedia Knowledge
	Internet Tools for Instruction
	Instructional Design for Interactive Technologies
	Media Attributes Knowledge
	Organizational
	Advising/Counseling
	Instructional Design
	Knowledge of Support Services
	Software
	Technology Access Knowledge
	Content Knowledge
	Public Relations
	Text Layout
	HTML Authoring

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## **Media Publisher/Editor**

The media publisher/editor assists the instructor in writing, editing and preparing print and/or web-based documents for publication as needed to support instruction. The media publisher/editor participates in decision process regarding appropriate media for distance learning environments. This role works with paper or electronic media depending on the institutional environment.

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<b>Role Description:</b> Assists instructor in writing, editing and preparing print and/or web-based documents for publication as needed to support instruction. Participates in decision process regarding appropriate media for distance learning environments.	
<b>Outputs</b>	<b>Competencies</b>
Prose appropriate to audience	Writing & Editing
Clear instructions and explanations	Collaboration/Teamwork
Print-ready documents, well organized text	Media Attributes Knowledge
Clearly organized web sites that facilitate learning	Multimedia Knowledge
Attractive, interactive & accessible web pages, forms for data collection and interaction	Basic Technology Knowledge
	HTML Authoring
	Text Layout
	Development of Collaborative, Student Focused Learning Environment
	Interpersonal Communication
	Graphic Design
	Knowledge of DL Field
	Software
	Technology Access Knowledge
	General Education Theory
	Instructional Design for Interactive Technologies
	Knowledge of Intellectual Property, Fair Usage & Copyright Regulations
	Adult Learning Theory
	Questioning & Feedback
	Instructional Design
	Learning Style and Theory
	Planning
	Project Management
	Internet Tools for Instruction
	Group Process
	Organizational
	Web Related Programming
	Evaluation
	Presentation
	Teaching Strategies/Models

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## **General Competencies**

The following competencies are required in all roles related to Online Program Delivery and Management and so are referred to as General Competencies.

<b>Competency Name</b>	<b>Competency Type*</b>
Collaboration and Teamwork Skills	Communication
Basic Technology Knowledge	Technology
Interpersonal Communication Skills	Communication
Knowledge of Distance Learning Field	Instruction
Writing Skills	Communication
Questioning Skills	Communication
Skills in Development of Collaborative, Student Focused Learning Environment	Instruction
Adult Learning Theory	Instruction
Knowledge of Support Services	Management
Feedback Skills	Instruction
Organizational Skills	Management
Technology Access Knowledge	Technology
Planning Skills	Management
Software Skills	Technology
Knowledge of Intellectual Property, Fair Usage & Copyright Regulations	Management
Facilitation (Discussion) Skills	Instruction
Public Relations Skills	Management
Multimedia Knowledge	Technology
Presentation Skills	Instruction
Consulting Skills	Management
Evaluation Skills	Instruction
Group Process Skills	Communication
Editing Skills	Communication
Project Management Skills	Management
Change Agent Skills	Management
Negotiation Skills	Communication
Needs Assessment Skills	Instruction
Data Analysis Skills	Management
Personal Organization Skills	Management

\* The “Competency Types” used above are to help explain the nature of the competencies and are not meant to be hard and fast categories.

It is notable that five of the top ten general competencies can be considered “Communication” related skills. These general competencies are required in varying levels among the different roles; for example, an instructor or instructional designer would need a much higher level of understanding of “Adult Learning Theory” than would an administrative assistant. Nevertheless, the administrative assistant would require an awareness of how to treat adult learners and how they differ from the typical college age student.