

Is Action Research an Appropriate Methodology to Investigate Distance Education in Brazil?

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Introduction

Distance education, as with most research areas, is a very broad topic. There is a large body of literature relating to it, including books, journals, articles, websites, a wealth of online materials, and so forth. Most universities around the world, including those in developing countries, have at least a pilot project using some kind of technology to deliver education. Online distance education, or simply the application of technologies in university teaching, is an inevitable reality, where technology is now seen as part of teaching and learning strategies (Turoff *et al.*, 2005). In the last few decades, academic concerns about online teaching have switched from learning how to use the technologies, to how to teach, motivate and facilitate learning at a distance (Jamieson, 2004). In addition, issues related to the quality of online teaching and learning, as well as how prepared lecturers are for enhancing learning within this new technological context in education, have also been raised. In Brazil for example, a developing country where distance education at a tertiary level has a short history, academic professional development activities for online teaching seem yet to be developed within their universities (Santos *et al.*, 2005).

Through this paper, I intend to share and discuss my reflections, perceptions, and personal journey as a postgraduate student and a novice researcher. This is the reason why this paper is written using the first person. Although some authors disapprove of this style of writing, many others write in first person in an attempt to share their personal and professional experiences amongst their peers (Richardson & Adams St. Pierre, 2005). Moreover, this paper will also briefly explore the initial stages of my PhD research, including an informal visit to three Brazilian universities during November and December 2005. It will begin to look at the literature related to distance education in Brazil, and explore the context of its higher education system. This brief explanation will also highlight the impact of the implementation of higher education reforms in Brazilian distance education practices, and, the necessity of online academic professional development in order to prepare university lecturers to deliver quality online teaching. Finally, this paper will discuss attempts to find an appropriate methodology to investigate more deeply online distance education and the development of academic staff for teaching online. Therefore, my personal debate on choosing a methodology is prominent. Choosing a suitable methodology to best answer my research question: *'To what extent is a blended model¹ an effective way to deliver professional development for online teaching in Brazilian higher distance*

¹ In this context, 'Blended Model' refers to a combination of multiple approaches to developing academic staff, integrating 'traditional learning with web-based online approaches', as well as other learning technologies (Oliver & Trigwell, 2005).

education institutions?’, has involved debate about whether to use action research and this aspect of my work is the focus of this paper.

Literature overview

One of the initial challenges I faced during the first months of my PhD was related to the literature. What I had researched before visiting Brazil, from November to December 2005, was not the actual reality I found there. Informal conversations with former lecturers and colleagues have provided my research with interesting and important information regarding Brazilian distance education, which I was unable to find in the most widely accessible literature. Brazil has aspects of many developing countries, as it attempts to catch up with emerging educational practices and technologies, while having limited financial resources. These problems are reflected in the obvious frustrations of academics who want to give their best and deliver a high quality of education to their students, but are prevented by the barriers created by the bureaucratic and centralised educational system.

In Brazil today, tertiary education is yet to permeate the educational landscape in any significant manner, and certainly not to the extent of many developed countries like Australia, Canada and the United States (Litto, 2003b). However, this is not merely due to economic factors, but rather has to do with aspects that are directly related to Brazilian history, culture, and also the result of the political realities that exist in contemporary Brazil (The World Bank, 2001; Litto, 2002). A complex combination of these factors is likely to be at the heart of understanding why such education has been limited in Brazil to date. According to Litto, distance education could be the solution for the provision of higher education in Brazil (Litto, 2002), where only 10% of the Brazilian population between the ages of 18 and 24 years (approximately 3 million students) are currently enrolled in higher education institutions. This percentage is very low if compared with other South American developing countries such as Argentina (40%), Venezuela (26%), Bolivia (20.6 %) and Chile (20.6 %) (Universia, 2006a). In addition, amongst those students with access to higher education, only 30% are studying for free at public universities (MEC, 2005b).

To address this, since late 2004, the Brazilian Federal Government has made changes to the higher educational system through reforms, and will be investing up until 2007, approximately R\$592 million Reais (the Brazilian currency), or approximately US\$300 million. The Federal Government maintains that the money will be used to build 10 new public federal universities, renovate and expand the facilities of another 42, hire academic staff, and administrative and technical staff, as well as create and implement pedagogical projects (MEC, 2006). Thus, with these new investments, in just a few years time the federal higher education system will be capable of enrolling twice as many students as now. However, it is not just a matter of increasing the budget and putting more money into federal universities, but rather, of changing higher educational policies, while also promoting qualitative and accessible education, and recognising the value of professional education (Guimaraes *et al.*, 2004; Mota, 2005).

Brazilian Distance Education

Brazil has a long history of distance education at the primary, secondary and vocational levels (ABED, 2005). The Brazilian Universal Institute and Telecurso 2000 are successful examples of distance education implemented in primary, secondary and vocational courses (Bof, 2004). The former has operated since 1941, with around 160,000 students enrolled in its courses annually, and the latter has provided distance education to approximately 50,000 students per year (IUB, 2005; Telecurso, 2005).

Distance education at the tertiary level represents a very new model of educational delivery in Brazil, compared with other countries; for example Australia, which has a 50 year history of tertiary distance education (Litto, 2003a). However, in the last decade distance education in Brazil has achieved a lot in terms of federal recognition and support from appropriate legislation. Even so, it still faces a long journey ahead. To begin with, distance education in Brazil, at the tertiary level, is not yet highly regarded as an additional and flexible way to deliver education, but rather, it seems to be viewed as simply an alternative solution in particular situations. Moreover, some characteristics of the Brazilian centralised political structure and views can be clearly seen in the distance education legislation, where distance courses have to have the same duration as face-to-face ones, and 20% of every course needs to be face-to-face. Furthermore, distance education degrees obtained abroad are not valid in Brazil, including those that are offered through partnerships with Brazilian and foreign universities. To be accepted by the education system, these degrees need to be submitted to public universities that offer similar courses and be re-evaluated ("Decreto nº 5.622", 2005; , "Resolucao cne/ces for postgraduate courses", 2004).

Currently, Brazil has approximately 2,320 higher educational institutions, including private and public institutions, yet only 128 have federal accreditation and are able to deliver undergraduate and postgraduate distance courses (Moreira Alves, 2005). These figures indicate that some Brazilian educational institutions still resist applying distance education in every way that they can (Young, 2000: 1). 'The reasons might be mostly cultural and difficulties in legislation, since there is already mistrust about the quality and truthfulness of the training and qualifications that can be provided at a distance' (Schwartzman, 2000:2).

The establishment of the Brazilian Open University (UAB) in late 2005 has been the most obvious impact of the federal educational reforms, after approximately 30 frustrated attempts to establish it by past governments (Universia, 2006a). The Brazilian Open University is not an institution by itself; it is basically formed from a partnership amongst federal and state public universities, and local, state and federal governments. It intends to offer initially 10,000 free places for disadvantaged students across the country, mainly in isolated areas. In addition, only business management courses will be delivered to students during this first stage, as a 'pilot course', starting in the second semester of 2006. Even though the establishment of the Open University might mean a big step towards the development of distance education in Brazil,

concerns regarding the quality of education that will be delivered, and the speed by which it has happened, have already been highlighted by the academic community. Prof. Dr. Edson Walmir Cazarini, Distance Education Centre coordinator at the University of Ribeirao Preto (UNAERP), a well-known private university, and, lecturer at the University of Sao Paulo, a state public university, pointed out that this fast growth might affect the academic careers and professional development of certain staff, as well as the academic job market. For example, professionals with any distance education experiences and skills have been recruited and more are wanted across the country (Cazarini, 2005). He argues 'Brazilian lecturers and students are not prepared to deal with distance education. Lecturers still think they possess the knowledge and should pass it onto their students. And, students still think the lecturers are responsible for their learning and want to remain passive and wait for the knowledge to be transmitted' (Cazarini, 2005; Universia, 2006b). In online distance education, a lecturers' role should be that of facilitating, encouraging, and guiding students through their learning journey, while using an appropriate distance pedagogical approach, adds Cazarini.

Professor Cazarini's concerns are shared amongst other professionals of online education around the world, where quality and effectiveness of university online teaching and learning, and the adoption of new educational approaches to promote online learning, seem to be the topic of many discussions. 'Professional development is the key to facilitating changes in university teaching' (Brack *et al.*, 2005:51). However, academic professional development is a challenging issue by itself. Until now, 'a large majority of academics worldwide continue to hold no formal qualifications in education, the expectations being that pedagogical knowledge and practical skills will be acquired through accumulated experiences of teaching practice' (Jamieson, 2004:21). Therefore, academic professional development for online teaching has become an even more complicated issue, where academics have to not only know how to apply the technologies for teaching, but to also be updated on the new teaching and learning strategies, as well as how to facilitate learning through promoting a more flexible, interactive, innovative, collaborative, and inclusive style of teaching (Brack *et al.*, 2005; Jamieson, 2004; Teghe & Knight, 2004; Turoff *et al.*, 2005).

If academic training for transforming online university teaching is a concern that is recognised in well established online higher education around the world, the reality in a developing country, with a short history of distance education, is even more challenging. Romiszowski highlights an important point about the literature regarding professional development. She argues that it is a topic not much discussed in Brazilian online teaching, maybe because of other distance education aspects that need to be first established, such as technologies and educational objectives (Romiszowski, 2002). However, the work of Dr. Ronaldo Linhares, University of Tiradentes, completely disagrees with Romiszowski's statement. Dr. Linhares is a well known online facilitator recognised nationally for his strategies for online teaching, and for introducing cultural aspects into education (Gadotti, 1994), more specifically into his online classes (Universia, 2006b). Another example of an institution investing in and supporting distance education through providing professional

development in Brazil is The Catholic University of Campinas (PUC). According to Dr. Jose Oscar Fontanini de Carvalho, coordinator of the PUC's Distance Education Department, distance education in his institution has been developed with quality in mind, rather than with quantity being the main focus for online academic training (Carvalho, 2005).

Although there are some successful examples of the development of competencies for online teaching, including successful models and strategies for training academics, many professionals teaching at a distance are still uploading, on their universities websites and Learning Management Systems (LMS), their printed material used in their face-to-face lectures, or in their traditional distance courses (Salmon, 2004). This is not the current best practice in online distance teaching. Online teaching and learning is described by Ryan as 'education delivery using the Internet' (Ryan, 2004:238). Salmon adds to Ryan's definition, emphasising that online teaching and learning should encourage 'interaction between people as an important form of support for the learning process' Additionally, online distance education institutions and practitioners should 'redesign pedagogical process using technology-based approaches and learner-centred principles' (Twigg, 2002: 3).

Considering that staff professional development is one of the main factors for effective and successful online teaching (Salmon, 2004), and that there are a lack of approaches to develop new teaching skills using technologies around the world, mainly in Brazil, my research proposal is to investigate academic professional development for online teaching in Brazil, as well as to recommend a professional development model that best suits the Brazilian context and reality. The above literature will significantly contribute to my investigation, which will be guided through the main research question, already mentioned above.

Methodology

During the first stage of my studies, action research seemed to be the appropriate methodology to research distance education in Brazil, in particular the application of online academic professional development. The reasons why I thought action research could be applied were firstly because action research is a 'methodology mainly characterised by its potential for collaborative review and improvement of educational or social programs and practices' (Kemmis, 1983:131). This suits the main propose of this research, where a model for improvement and, in some cases, initiating online training of universities instructors will be recommended in Brazilian universities applying online distance education, promoting, thus, *improvement of educational programs and practices*. Additionally, after visiting Brazil, I was able to compare *data gathered* from the literature to the reality found there, then *reflect and analyse* about these new findings. After that, I could *interpret and build* a new understanding of the situation, and then *replan and evaluate* the next steps of my studies based on the new data gathered. The process mentioned above, and the process my thinking and studies went through, has been described by Kemmis, McTaggart, Stringer, among other action research theorists, as being 'a basic action research routine, or the action research spiral' (Kemmis, 1983:142; Kemmis & McTaggart, 1988:11; Stringer, 1999:18).

However, further investigation of the action research literature, and conversations with academics in the area, made me realise that action research does not suit this study for two main reasons. To begin with, it is collaborative. Kemmis highlights strongly the importance of collaboration in action research throughout his work. He says that 'more powerful forms of action research involve collaboration between participants themselves for common work on problems of mutual concern' (Kemmis, 1983:133). Action research also involves a group of researchers engaged in sharing experiences, working and learning together in action (Kemmis & McTaggart, 2005). Most importantly, action research means literally 'action'. 'The linking of the terms 'action' and 'research' highlights the essential feature of the approach', explains Kemmis (Kemmis & McTaggart, 1988:6). Nevertheless, due to limited financial resources, participants and researchers availability and time, collaboration amongst participants and researchers will not be undertaken, and the principal intention of my PhD research will be to recommend a suitable model for Brazilian online academic professional development, but not to implement it. Consequently, the 'action' will not take place. Therefore, action research methodology cannot be applied to this particular study.

Although 'action research is not individualistic' (Kemmis & McTaggart, 1988:15), Kemmis acknowledges that 'not all theorists of action research place this emphasis on collaboration; they argue that action research is frequently a solitary process of systematic self reflection' (Kemmis & McTaggart, 2005:563). Indeed, I personally went through a process of self-reflection and improvement during the first stages of my research, and actually, I still see myself in it. Even so, what researchers do not go through this process? Kemmis also concedes this (Kemmis & McTaggart, 2005). On the other hand, self-reflection as a process by itself, it is not enough to support a methodology such as action research.

If action research is not considered appropriate for this particular study, then which approach, within the wide range of methods in qualitative methodology, should be applied? Qualitative methodology is required in this research study due to the interrogative relationship between perceptions and educational practices, with a view to making judgments and recommendations for online teaching practices, and the most appropriate model for professional development (Borg & Gall, 1989a). Additional research in qualitative inquiry methods reveals that case studies would best suit this research enterprise. To begin with, I will be able to use the previous contacts that I have made in Brazil as potential case studies. They will represent a range of different higher education institutions applying online distance education, such as federal public universities, state public universities, private universities and only online or virtual universities in Brazil. Stake uses the term 'Instrumental Case Study' for my choice of case studies (Stake, 2005). He explains:

If a particular case is examined mainly to provide insight into an issue or redraw a generalisation. The case is of secondary interest, it plays a supportive role, and it facilitates our understanding of something else. The case still is looked at in depth, its contexts scrutinized and its ordinary activities detailed, but all because this helps us pursue the external interest (Stake, 2005:445).

In addition, previous contacts might facilitate access to people and data collection, enabling an even richer 'thick description' of the cases being studied, thus offering, more opportunity to learn about the cases (Stake, 2005).

Furthermore, the flexibility and variety of methods of inquiry that can be used during case study research, such as 'observation, interview, audio-visual recording, field notes, document collection, and negotiation of products' (Adelman *et al.*, 1976:141), will give to my study a much more comprehensive understanding of the problems to be investigated. In addition, the flexibility of approaches will produce an in-depth description of the cases to be investigated, considering the cultural circumstances and the characteristics of the people and institutions involved in each case (Yin, 1994). Most importantly, case study data is 'strong in reality' and will be able to provide to a wide audience insight into the application of a model for online professional development, contributing to progress in Brazilian online distance education, as well as to the worldwide online community (Adelman *et al.*, 1976).

Moreover, the case study approach allows a researcher to experience the process of self-reflection and improvement throughout the investigation (Merriam, 1998). However, researchers need to be very careful not to impose, through case study research interpretation, description and reflection, their own personal views, meanings and feelings onto such research, but rather, always offering 'some support for alternative interpretations' (Adelman *et al.*, 1976:150; Stake, 2005).

Conclusion

It has been seen that the development of new teaching skills to deliver effective and quality online distance education is an inevitable reality that must be faced by universities and academics. In Brazil today, there are some successful examples of the use of technologies to enhance online learning. However, many professionals teaching online do not facilitate flexible online learning, but rather, simply apply the old fashioned way of teaching, where lecturers possess the knowledge. One solution to this problem is to empower them with new teaching skills and pedagogical strategies and approaches through professional development for online teaching. Considering this, my PhD research will then recommend a suitable model to enhance academic professional development for online teaching in Brazil, using case study as a principal method of inquiry, exploring the variety of approaches that case study brings, allowing for a more comprehensive investigation. It does not mean, however, that the self-reflection and improvement that I have been through will stop. There are still many challenges to overcome during this investigative journey, and greater understanding to be gained about the research I am doing, and the way I research.

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