

# ONLINE COACHING: DEVELOPING ASSESSMENT CRITERIA

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F – Research and Assessment

5 – Continued Education in General

A – Research Report

1 – Scientific Investigation

## **ABSTRACT**

*This case study is part of an investigation which aims at analyzing institutional assessment systems for distance education courses based on the theoretical models of Hadji and Saul. The chosen focus refers to the assessment of coaches' performance by course-takers and by the coaches themselves and to their expectations in relation to the skills and competencies that coaches should possess. The situation which served as study object was the specialization course at PUC-Rio, catering to active teachers at six different schools from three states in Brazil, from 2005 to 2007. The resulting responses to the online questionnaire by 36 course-takers (66,7% of the group) and by the three coaches led to the perception of the importance of the coaches' mediation. However, the course-takers tended to give greater importance to the transmission of content and to the teaching experience of the coach, whereas the coaches emphasized competencies which have more to do with following up on the process. In view of these results, one is called on to reflect on the assessment system of coaches before, during and after the act of coaching and during the planning of new courses.*

**Key words:** distance education - online coaching - assessment

## Introduction

Authors who write on the characteristics of Distance Education converge on the perspective that, in this mode, the teacher's figure is replaced by the actions of a multidisciplinary team. In Belloni's analysis (2001), for instance, at one end of the teaching-learning process itself is the function of the content teacher or author-teacher who comes up with the course contents, plans the activities to be carried out and puts together the assessment system; at the other end of the process is the coaching function, which follows up on the teaching-learning process. Between these two points of the process a group of specialists acts to support both the content teacher and the coach.

However, authors and specialists from the area do not agree as much when it comes to going deeper into the meaning of "following up on the teaching-learning process". The importance of the role which has been or should have been performed by coaching in distance education has been subjected to constant scrutiny. Maggio (2001), for instance, points out the following issues and questions, which persist to this day:

What does it mean to be a coach? How far can the task reach? What is the specificity of the role? Is there a specificity of the role? Who is acknowledged as a good coach? How does one train a coach? How does one assess his/her work? Is the coach essential in distance education? (p. 93)

In a recent exchange of messages on the Discussion Group at Unesco's School of Distance Education, which lasted from June 7 to June 27, 2007, the position of several participants also demonstrated that we are far from reaching a consensus on the figure of the coach due to the differences in training and experience at different institutions and countries. Some of the speeches were translated from Spanish, identifying the origin of the participant, in order to serve as a starting point for our reflection.

*A teacher and a coach are completely different figures in Distance Education. The coach is the mediator between the teacher and his/her pupils. The coach is a moderator of communication processes which are established through the use of different tools of communication and can also turn out to be a knowledge manager. The teacher creates the materials, the content, the methodology to be applied... (UNED - Spain)*

It is possible to notice in these speeches the tendency to consider the role of following up on learning as being merely supportive in distance education. A teacher can even play the role of coach, however the title 'teacher' seems to always fit the author-teacher or content teacher. In a different line of thinking, several professionals from the area distinguish between the roles of teacher and coach based simply on logistical reasons. In their words:

*The roles of the material-producing teacher and that of the follow-up teacher, coach or facilitator, however he/she is called, are different, but at certain times can be carried out by the same person. [...] However, one could not possibly attend to a group of, say, 50 pupils [...](UNAM - Mexico)*

This logistical issue is one of the aspects found in the distinction which Wilson Azevedo (apud CARVALHO, 2006) makes of two paradigms which support Distance Education: the Industrial Paradigm and the Informational Paradigm. As per the Industrial Paradigm of Distance Education, the courses are supposed to cater to a large number of people and, for this reason, their operational structure distinguishes the different roles of content teachers, *instructional designers*, the team responsible for production and distribution,

pupils and coaches. The production of the course's teaching material, done in the mold of a factory's production line, is the main support of this paradigm. After it has been finished it can be multiplied for distribution to the pupils, "at a cost which tends to be smaller the larger the number of pupils" (CARVALHO, 2006, p. 99).

The Informational Paradigm of Distance Education arises as informational networks and computer-mediated communication allow contact (and interaction) among the main actors in the teaching-learning process – teacher and pupils – in an information environment (learning environments). The main roles are those of teachers, pupils and multidisciplinary support team. This paradigm, also named Post-industrial or Socio-interactionist, focuses on the 'interaction between teachers and course-takers and among the latter, highlighting collaborative work, teamwork, engendering synergy in a manner which is more compatible with current educational lines" (Carvalho, 2006, p.101). It seems evident that the 'logistical' aspect can in fact serve only as justification for one of the above-mentioned approaches.

Finally, the observation of one of the participants sheds light on ways to pursue this analysis.

*It seems to me that what is really important is the conceptual clarity which the educational institution manifests in its core syllabus. In our university we apply the C.L.S. methodology (Coaching Learning System). Obviously, the role of the coach is this methodology is fundamental. We are all coaches, since our role is to coach learning. (Colombia)*

By calling attention to the specificity of his experience, this specialist calls our attention to a very important facet of this issue: there have been several distance education experiences in Brazil and little is known about the details of its workings and, more specifically, about the coaching model adopted and what has been done to assess it.

In this text, a case study will be presented which is part of a larger investigation aimed at analyzing institutional assessment systems of distance education courses based on the theoretical models of Hadji and Saul. The chosen focus refers to the assessment of coaches' performance by course-takers and by the coaches themselves and to their expectations in relation to the skills and competencies that coaches should possess, in light of the course's proposal, having in mind the cooperative construction of pertinent assessment criteria before, during and after the act of coaching (Hadji, 1994). The emphasis on the participation of the main actors involved in the process reflects our endorsement of the perspective of emancipating assessment defended by Saul (1988).

## 1. The research

The object situation of the study refers to the training program for active teachers which in its distance education mode has been developed by PUC-Rio since the 90's through the specialization course entitled *Educational Syllabus and Practice*. This course has allowed the certification of around 1.000 teachers belonging to three confessional school systems located in 14 Brazilian states. The model in which distance education was conducted in these courses fell within the traditional canon: printed material, coaching through a phone and fax hotline and logistical support in local support centers (CALs) at the educational institutions catered to. One of the serious problems faced in

conducting the course had to do with distance coaching because the phone and fax hotline systems did not meet the course-takers' needs, since very often the course-takers were not available at the hours offered.

The program was then rendered entirely online, offering 540 hours of distance education and 80 hours of activities in seminars carried out through video-conferencing. In this new edition, started in August of 2005 and finished in June of 2007, the AulaNet environment tools were used. This environment was developed by PUC-Rio itself. The final tests for each subject continued to be taken at the Local Support Centers at state level (in the case of this course in the states of Rio de Janeiro, São Paulo and Minas Gerais). Each state took part with two units of the school system demanding this specialization. The presentation of all final papers was held on the PUC-Rio campus.

As regards coaching, it started having a very meaningful role in this new course model, presenting the following characteristics based on the course's proposal:

Distance coaching is a permanent activity in the development of the course. Its goal is to follow up on the course-taker so as to offer him/her the necessary help in his/her self-teaching process, motivating him/her to carry out tasks and to relate the acquired knowledge to his/her concrete teaching practice, thus enabling the solution of difficulties faced. [...] Because of the specificity of the course, the coaching shall be done by teams directly connected to and supervised by the teachers responsible for the course subjects. [...] The formation of cooperative study groups will be encouraged mainly through discussion forums which shall be held under the online supervision of the group's coach (PUC-RIO, 2005, p.18)

These coaches were mainly MA and PhD students who took part in the research group of the professor responsible for the subject, with whom they had thorough affinity as regards content. The final decision on the selection of each coach rested with the course's general pedagogical coordination, as did a preliminary orientation on the use of AulaNet and practical training during the coach's participation in the subject.

Coaches and course-takers became the main subjects of this research: there were 54 course-takers, coming from six different schools from the states of Rio de Janeiro, São Paulo and Minas Gerais. Online coaching was carried out by three coaches and the number of course-takers under the responsibility of each coach ranged from 9 to 27. Each group of two schools, within each state, worked as a stand-alone group. Among the states, however, there were no exchanges; the groups acted as separate classes and the entire group only met 'in person' when the term papers were presented, in June 2007.

Basically, two strategies were adopted to obtain the necessary data for the development of the case study: collecting discussion forum records and an online questionnaire.

Discussion forum records turned out to be rich data sources, since they encompassed the number of messages and their authors, the time the messages were sent, who they were sent to and, mainly, the bona fide content of course-takers' and coaches' input. Within the three groups, or states, the teachers who took the course, along with their respective coaches, totaled 2296 emails during the 21 forums held.

Besides this documented source, two online questionnaires were developed, one for course-takers and another for coaches. In both, the following data, of great interest to the research, were found:

- Rapport between course-takers and coaches.

- The performance profile of coaches in the subjects of the course's first module, consisting of ten aspects specifically selected for this research based on bibliographical review and on the course's pedagogical project.
- The desirable profile of online coach based on the selection of the five most important qualities / competencies and of the five least important among 17 alternatives presented, also selected from bibliographical review and from the course's pedagogical project.

In order to compare the sources the development of the coaches' questionnaire was based on the course-takers' questionnaire, with care in disclosing to the former the closed questions of the course-takers' questionnaire, thus allowing a greater richness of research material.

After requesting authorization to participate in the research from all course-taking teachers who finished the first module and reached the end of the course, the questionnaires were emailed by the course's Coordination at the end of June, 2007. At this time, course-takers were finishing their term papers and were therefore better able to assess a coach's most important qualities. The coaches' questionnaires were emailed by the course's Coordination at the end of June 2007, at a time when the coaches had already finished their course duties (some of them helped course-takers with their term papers).

### 3. Results obtained

Once the data collection process had been completed, it was possible to work with the responses of 36 course-takers (66,7% of the group) and of the three coaches to the questionnaires and in some discussion forums. This text will base its analysis of results on the information gathered from the online questionnaires, since its scope does not allow the presentation of data from the discussion forums.

#### *Profile of research participants*

The group of course-takers, as a whole, was predominantly female (92%) and worked in elementary education (52%), children's education (21%), and in high schools (19%). Few course-taking teachers worked in youth or adult education (8%) and none of them in colleges. As regards their previous experience in Distance Education, most of the research participants (92%) had not had any.

The three coaches had an MA in Education, while one of them was pursuing a PhD. As for their previous experience with Distance Education, the coaches from Rio de Janeiro and Minas Gerais had already participated, as students, in distance education courses, whereas the coach from São Paulo declared not having had any previous experience.

In relation to how they joined the course, the coaches were recommended and invited by content teachers to work under their supervision. All received the course material in advance, as well as guidance from the content teachers and from the technical team on the use of AulaNet, and participated in the opening videoconference.

As regards the roles they played in the course, it is important to note how each coach (identified in the text by the initials of the State in which they coached) perceived the roles that were assigned to them.

*It was explained to me that I was to be in charge of following up on the course-takers, which consisted of: clarifying contents (when this was beyond my capabilities, I asked for the author-teacher's help), directing*

*them to technical support, making sure the schedule was met, establishing communication in the forums. [...] (TUT- MG)*

*I was told to follow the subject's program, to regularly log into the AulaNet environment, that is, to manage the subject online. (TUT-SP)*

*Since I had already had some experience coaching in distance education, I made use of it in my participation. The main role of coaching is moderation, orientation, encouragement, and guidance. (TUT-RJ)*

With Belloni (2001) in mind as regards the roles of the teacher in distance education, one can identify in the coaches' opinions the roles that this author defines as *following up on the learning process*. It can be noticed that it was expected of the coaches to perform the roles of teacher-educator and of teacher-coach.

### *Perception of course-takers about the coaches' performance*

The responses demonstrated that the 36 course-takers had a very positive perception of the coaches' performance, as can be seen in Table 1. It can be noticed that most of the course-takers' responses fell into the alternative *yes, many times*, the lowest percentage observed being 81%, in three of the strategies presented: *encouraged the further study of content; mediated discussions in a balanced way; and asked questions*.

**TABLE 1:** Performance of coaches in discussion forums from the perspective of course-takers and coaches themselves

| STRATEGIES OBSERVED  | OPTIONS          | COURSE-TAKERS<br>N=36 | COACHES<br>N=3 |
|--|------------------|-----------------------|----------------|
| Encouraged the participation of students                     | Yes, many times  | 35                    | 3              |
|  | Yes, a few times | 1                     | -              |
|  | Not observed     | -                     | -              |
| Encouraged constant communication among students             | Yes, many times  | 31                    | 2              |
|  | Yes, a few times | 4                     | --             |
|  | Not observed     | 1                     | 1              |
| Answered questions about the content of texts                | Yes, many times  | 30                    | 2              |
|  | Yes, a few times | 4                     | 1              |
|  | Not observed     | 2                     | -              |
| Encouraged the further study of content                      | Yes, many times  | 29                    | 2              |
|  | Yes, a few times | 5                     | -              |
|  | Not observed     | 2                     | 1*             |
| Conducted (mediated) group discussions                       | Yes, many times  | 32                    | 3              |
|  | Yes, a few times | 3                     | -              |
|  | Not observed     | 1                     | -              |
| Mediated discussions in a balanced way                       | Yes, many times  | 29                    | 2              |
|  | Yes, a few times | 5                     | 1              |
|  | Not observed     | 2                     | -              |
| Kept in constant touch with the group                        | Yes, many times  | 33                    | 3              |
|  | Yes, a few times | 2                     | -              |
|  | Not observed     | 1                     | -              |
| Asked questions  | Yes, many times  | 29                    | 2              |
|  | Yes, a few times | 6                     | 1              |
|  | Not observed     | 1                     | -              |
| Led students to reflect on the teaching practice             | Yes, many times  | 33                    | 2              |
|  | Yes, a few times | 3                     | 1              |
|  | Not observed     | -                     | -              |
| Made thorough and constructive comments in a pleasant manner | Yes, many times  | 34                    | 3              |
|  | Yes, a few times | 1                     | -              |
|  | Not observed     | 1                     | -              |

\*In these cases, the coach responded it was not possible to use the strategy.

Source: Questionnaire for course-takers and coaches

The self-evaluation of the coaches as regards their performance/interaction in the discussion forum was generally positive. It converges with the course-takers' perception in reference to *encouragement of course-takers' participation* and to the presence of *constructive comments in a pleasant manner*. This perception of the main actors of the discussion forums seems to indicate that the category *communication* was extensively noted and valued. In response to the open question on how they saw their performance, the coaches pointed out, once more, their preoccupation with a good rapport with the group and with their participation in the discussion forums, however different the nuances.

#### *Perception of course-takers about the desired profile of an online coach*

This part of the questionnaire asked course-takers and coaches to point out with the letter A, based on the experience with coaching in the subject Research and the Construction of Teaching Knowledge, the 5 qualities / competencies which they considered the most important for the performance of an online coach and, with the letter C, the 5 which they considered the least important, among 17 available alternatives.

Based on a table containing all gross data, it was possible to single out the five qualities with the highest number of A evaluations, as well as those with the highest number of C evaluations, as assessed by the two groups. The results are summarized in Tables 2 and 3 as follows.

**TABLE 2:** Qualities / competencies of online coaches considered the most important (a) by course-takers and/or coaches

| QUALITIES / COMPETENCIES OF ONLINE COACHES                     | COURSE-TAKERS<br>N=36 | COACHES<br>N=3 |
|--|-----------------------|----------------|
| Mastering course's content                                     | 19                    | 1              |
| Relating theory to practice                                    | 17                    | -              |
| Having teaching experience                                     | 16                    | 1              |
| Constantly keeping in touch with the group                     | 15                    | 2              |
| Encouragement of course-takers' participation                  | 14                    | 1              |
| Establishing empathy with their interlocutors                  | 14                    | -              |
| Making thorough and constructive comments in a pleasant manner | 10                    | 3              |
| Having written communication skills with course-takers         | 08                    | 2              |

Source: Questionnaire for course-takers and coaches

In Table 2 it is possible to ascertain, firstly, that course-takers give a lot of importance to the mastery of the course's content (53%) and to the teaching experience of the coach (44%), which logically suggests a connection between theory and practice, the second alternative most chosen by the group (47%). In the second group of alternatives, we find those which are directly connected to the relationship between course-takers and coaches: *constantly keeping in touch with the group* (41%); and tied with 38% *encouragement of course-takers' participation and establishing empathy with interlocutors*.

As far as the coaches go, it can be observed, in the third group of the same table, that the alternative *making thorough and constructive comments in a pleasant manner* was the only unanimous one among them, which is confirmed by the following words by a coach from São Paulo: "*I believe I have*

*facilitated the course-takers' learning with objective and constructive comments.*" (TUT-SP). However, this alternative, as well as the one about *having written communication skills*, were not among the most voted by course-takers.

By comparing the qualities / competencies of online coaches deemed the most important by both coaches and course-takers, one can notice an affinity in their choice of alternatives as regards *constantly keeping in touch with the group*. The alternative *making thorough and constructive comments in a pleasant way* was not chosen by the course-takers, but they point out similar qualities such as *establishing empathy* and *encouragement of course-takers' participation*. On the other hand, qualities which were abundantly highlighted by the course-takers, such as *mastery of content and teaching experience*, are only mentioned by one of the coaches, as can be seen in Table 2.

Finally, the course-takers highlighted the following qualities / competencies which were not included in the questionnaire: "*constant presence of the coach, making him/herself clearly understood and avoiding an excess of academicism*"; "*keeping the discussion alive, yet noticing when to shift focus*"; "*encouragement of participants' interaction aiming at quality, not quantity*". One of the coaches added two more: "*guiding course-takers as regard the subject's chronogram so that they can organize their tasks*"; *encouraging course-takers to be self-reliant, showing that one can interact with another in an attempt to provide data and reflections capable of solving possible doubts*". (TUT – MG)

Below, in Table 3, results about qualities / competencies considered the least important are presented .

**TABLE 3:** Qualities / competencies of online coaches considered the least important (c) by course-takers and/or coaches

| QUALITIES / COMPETENCIES OF ONLINE COACHES                      | COURSE-TAKERS | COACHES* |
|---|---------------|----------|
|   | N=36          | N=3      |
| Encouragement to ask further questions                          | 21            | 1        |
| Establishment of a link between the student and the institution | 19            | 2        |
| Mastering the resources of the online environment               | 15            | -        |
| Positive motivation towards the accomplishment of tasks         | 10            | 2        |
| Extra help to students in need                                  | 9             | -        |

\* Other options chosen with frequency equal to 1: *encouragement of students' participation* (course-takers = zero); *prompt responses to the requests of participants* (7); *mastering the content of courses* (3); *establishing empathy with their interlocutors* (5); *relating theory to practice* (2); *providing feedback on assignments in due time* (1)

Source: Questionnaire for course-takers and coaches

In Table 3, course-takers' responses could be sorted into three blocks of meaning. In the first group, one would find alternatives such as *mastery of environment* and *connection between student and institution*, which represent a more instrumental / institutional performance by the coach, considered by the group as having less importance in the face of didactic and communicative skills. In the second group, the importance of predominantly encouraging and supportive activities is also minimized.

Based on the results presented in Table 3, which refers to the five qualities / competencies of an online coach considered the least important by the coaches and course-takers, one can notice a converging opinion about the alternatives *encouragement to ask further questions*, *provide a connection between the course-taker and the institution promoting the course* and *positively motivate for the execution of tasks*.



## Conclusion

The proposal of the course of emphasizing the coach's role as a mediator for the group of course-takers, as well as trying to replace an emphasis on the transmission of information with cooperative learning, engendered the set of indicators proposed as quality criteria for coaches' performance. Some of the questionnaire's alternatives seemed to be the same, yet they reflected behavioral nuances which ranged from the mere 'bureaucratic' steering of a coach to skills typical of a professor. The group's positive assessment of coaches, mainly as regards strategies related to the didactic and communicative qualities, made evident the consistency of the coach's profile proposed by this course's project, which was taken as a reference.

As for the course-takers' and coaches' view on the desirable profile of an online coach, independently of the course, the set of criteria presented in the questionnaire and the data collected from the group engendered new reflections on possible assessment criteria for coaches. It was possible to notice, for instance, that they converged on the importance of *keeping in constant touch with the group*. However, other skills were given different weights: (a) course-takers, for example, demonstrated to be more worried about skills related to teaching experience and mastery of content than coaches were, which reflects the proposal of several existing course projects; (b) two coaches emphasized *the capacity of written communication with course-takers*, as did some of the latter, a requirement which is not always valued in the hiring of coaches (diagnostic assessment).

Notwithstanding, it is important to point out that the whole group perceived the lesser importance of a more instrumental performance, represented by the alternatives *providing a connection between course-taker and institution* or *mastering the resources of cyberspace*, which characterize a more instrumental performance. Finally, other more challenging competencies (both for coaches and course-takers), such as *encouragement to ask further questions* were the least valued by course-takers and, surprisingly, by the coaches as well. It is an issue worth giving thought to.

Based on this first participative gathering of assessment criteria, a comparison is being developed between that which is proposed by SINAES and that which is proposed by other higher education institutions as regards coaching assessment criteria, as well as the application of this gathering to the other aspects of this course.

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