Social Presence in Online Learning Environments

Interpersonal Connection

Participant Satisfaction

Organizational Productivity

Facilitating Social Presence

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Social Presence in Online Learning Environments

Overview

With the rapid transition from face-to-face instruction to online videoconferencing, resulting from the COVID-19 health pandemic, instructors and organizations are looking for ways to make interpersonal connections with participants to stimulate the learning environment. Some participants may excel in online learning, while others may feel challenged and isolated, which may limit their learning experience, and performance.

Social presence is an online learning theory that can promote personal connectivity. It recognizes, validates, and stimulates participants' involvement, so they feel engaged and valued. It encourages varied uses of online tools for mediated communication, collaboration, reflection, and emphasizes interpersonal connections like face-to-face interactions to build trust and knowledge. This module is based on the online techniques used by the Practical Project Management (PPM) Program in the Anderson School's Professional Development Programs at the University of New Mexico.

This module addresses:

- Defining Social Presence
- Establishing Social Presence
- Navigation & Etiquette
- Framework for Collaborations
- Polling for Engagement & Knowledge Checks
- Conclusion

Defining Social Presence

In online instruction, social presence recognizes participants' individual qualities, and increases their degree of participation and satisfaction. Humanizing the online learning environment with social presence heightens participants' identity, and unique perspectives to stimulate knowledge building. Offering learners, a variety of communication options increases connectivity to varied learning styles.

The concept of 'social presence' was established by Short, Williams and Christie (1976). It recognizes "the degree to which a person is perceived as a 'real person' in mediated communication." In relation to interpersonal contact two main concepts were identified: 'intimacy' and 'immediacy.' "Intimacy is a factor of the medium used for communication and immediacy is the psychological distance between communicators" (Short, Williams, and Christie, 1976 as cited in Gunawardena et al., 2019, p. 60).

In online learning environments, social presence emphasizes humanizing interpersonal connections like face-to-face interactions. The psychological element of human connectivity was enhanced by Gunawardena and Zittle. Research on social presence, and immediacy created by interacting participants and through the intimacy of the medium, found it to be a strong predictor of learner satisfaction (Gunawardena & Zittle, 1997). Through shared experiences

while acquiring knowledge, participants feel recognized and validated. In the PPM Program, these interactions result in participants expressing their enjoyment in online learning activities. If learners are satisfied with computer- mediated learning experiences, it is likely that the affective needs of the learning process were taken care of, and they are more likely to enroll in such experiences again (Gunawardena & Zittle, 1997). Program surveys can assess participant's degree of satisfaction with the online experience in areas of interaction with instructor, other participants, and the overall experience.

Establishing and Generating Social Presence

In establishing social presence, an emphasis should be placed on making the online learning environment comfortable for the instructor and participants. Humanizing the learning process can be achieved with respectful reflective communications to include sharing stories, humor, photos, text chatting, and asking questions to collectively acquire and share knowledge. Participant and instructor introductions play a valuable role in establishing social connections by sharing their backgrounds and experiences. Instructors in the PPM Program use collaborative activities like:

- Constructing a chronology of a process or story
- Problem solving and collective group development
- Communication practices in following or giving directions

In facilitating social presence some aspects include:

- Promoting trust within groups
- Encourage critical questions to be asked of peers
- Use organic spontaneity in responding to group and individual needs

Apply cultural sensitivity in online communities, open to learners' varied needs and perceptions. Encourage participants to share information, from their unique perspective allowing flexibility in their preferred learning and communication styles. Some participants making transitions to or from educational/employment settings may need encouragement and time to find their voice. For example, English as second language participants bring unique value to group processes and can enhance conceptual clarity in collaborative development. Collaborations can allow participants in transition time to develop self-confidence in their preferred communication style and build trust.

Navigation & Etiquette

A technical orientation in the online environment helps participants establish an understanding and comfort with the technology. Hands on experience facilitates constructive knowledge development. Encouraging use of varied tools like open microphone, video, and chat options to communicate with their peers can promote trust and confidence. In Gunawardena's view: Many learners who are new to online learning are apprehensive to communicate with a group of people they do not know. They need to feel safe and respected by others. They need both physical

access to technology tools, and psychological access and comfort in using the tools. (Gunawardena, 2019). During this time of rapid transition to online learning, reminding participants that we are all learning to adapt to new communication tools, helps to promote trust and collaborative learning.

To orient users to Zoom's dashboard, Instructors and facilitators can adjust their setting to share their Zoom window, which allows participants a clear view of the instructor's dashboard and individual tools.

For guidelines to these processes, see Appendix A, Show your Zoom Dashboard to Participants' and Appendix B, Orientation of the Zoom Dashboard and Tools.

Some best practices for videoconferencing include:

- Use a hardline cable for internet connection for communication stability, oppose to wireless Wi-Fi.
- Try muting video and using audio as an option, if signal inconsistencies occur, Technical limitations with multiple user's camera activation, may cause bandwidth limitations for the session.
- Instructors can typically use the camera to teach the session but can limit use if needed.
- Provide additional technical support contact information for assistance to ensure participants have technical assistance outside of scheduled sessions.
- Check for current updates on a weekly basis, to maintain the Zoom application, and fully utilize the current tools and features.

For a guide to updating Zoom, see Appendix C, Updating Zoom to Current Version

To promote ease in navigating the program's materials, organize files in the same chronological order of the program's curriculum, in the online file system or OneDrive. Suggested file naming system may include:

- o Week Number, Session Dates, Topic
- o (Week 01, 2.23.21 & 2.25.21, Five Phases of Project Management)

With administrative access, instructors can upload and edit content as needed.

See Appendix D, Program Curriculum Draft and Appendix E, Program Files in OneDrive

As the programs starts, establish guidelines for online etiquette to promote a respectful and professional learning environment. State your preferences on how and when to ask questions, like raise hand, chat, or open mic. An example of etiquette guidelines used by the PPM Program, suggests a 'Social Contract' or Rules of Engagement. These guidelines encourage participants to:

- Give peers respect by allowing them to express their ideas
- Practice active listening
- Talking, sharing ideas, and giving feedback in the conversation

These collaborative principals promote reflective interpersonal interactions in an online community, stimulate knowledge building and contribute to participant's overall satisfaction.

Framework for Collaboration Activities

To promote a business-like environment, consider developing teams for the length of the program. Established teams allows group cohesion to develop business like collaborations and practices. Team collaborations develop trust through brainstorming, problem solving, peer mentoring, sharing perspectives and knowledge building.

Diversity in team member selection can play a valuable role in promoting inclusive dialogue. The PPM Program assembled teams to ensure diversity was distributed by gender, job title, years of work experience, and personality types like introvert or extravert. Diversity promotes social presence and encourages dynamic interactions within the groups. Social presence needs to be intentionally designed to build a culturally inclusive community (Gunawardena, 2019). Teams can be based on intake and survey information and assemble prior to the program.

Instructors in the PPM Program use team building, so all diversified participants are on an equal level collaborating in a dynamic exchange in problem solving. They encourage participants to approach activities by introducing breakout rooms as a real business tool, applying an agile or adaptive approach to group collaborations. Some recommendations include:

- Come to the process from a humble place.
- Ask questions in relation to how this experience will benefit you in the future.
- Visualize yourself being successful.

To manage session timeframe and group activities, consider assigning a facilitator and notetaker/presenter.

- Facilitator
  - Calls on team members for input.
  - Manages time and keeps the group on task.
- Note taker/Presenter
  - Records the activity information during the activity.
  - Shares or presents the information to the larger group in reflections.

Instructor and participants can track assigned roles in a template schedule by the week and session. The assigned or suggested framework ensures all participants facilitate, take notes and present material. The schedule allows instructor to spend quality time with each group and get acquainted with all participants. A weekly Roster Role Assignment can be place in the program's weekly curriculum folder.

See Appendix F, Team Roster Role Assignments, and Appendix G, Weekly Roster Role Assignment.

Activity time management can be based on the activities' total time, with projected timeframes for breakout activity, and reflections. Accounting for the total number of participants, number of groups, and size of each group, the instructor can establish activity timeframes to manage the session's overall time.

See Appendix H, Activity Time Frame Group Size Formula

Polling for Engagement & Knowledge Checks

Polling offers interconnections through participant input. It allows information gathering on topics of interest, opinions and verifying knowledge of content. Polling can also provide quantitative data, verifying the percentage of actively engaged participants. It can be used to quiz and review content to conclude segments. Results from polling can be shared with participants to encourage reflection and promote collaborative assessments.

- Give the poll to gain input
- Show the results
- Reflect on the results

These interactions validate the instructional methods and checks participants' comprehension of material while providing opportunities for questions and clarification. Technical assistant or meeting host can compose polls prior to or during session based on content provided by instructor through email or private chat. Access to the polling report is available to meeting host will show participant's answers if needed.

For guidelines to add polls to sessions, see Appendix I, Adding Poll Questions using the Web Portal.

Conclusion

Social presence appeals to the human and interpersonal aspects of learning. Elements of respectful online etiquette sustain a candor for knowledge sharing and building. Framework and diversified teams promote engaging activities and collaborations, that promote inclusive reflections and critical conceptual development yielding transformative learning.

As organizations recognize and utilize elements of social presence to satisfy participant's interpersonal experiences through instructional, administrative, and technical perspectives, the educational product will meet the learner and stakeholder's needs. The collaborative nature of social presence in online environments promotes team building through collective problem solving, yielding productivity for individuals and the organizations they serve.

Appendix A

Show your Zoom Dashboard to Participants' Orientation

To orient users to Zoom's dashboard, Instructors can adjust their setting to share their Zoom window. This helps orient new users the tools within Zoom so they can use the varied tools and communication options.

1. Sign-in to your Zoom portal, example: unm.zoom.us
2. Enter your username and password
3. **Select Settings**
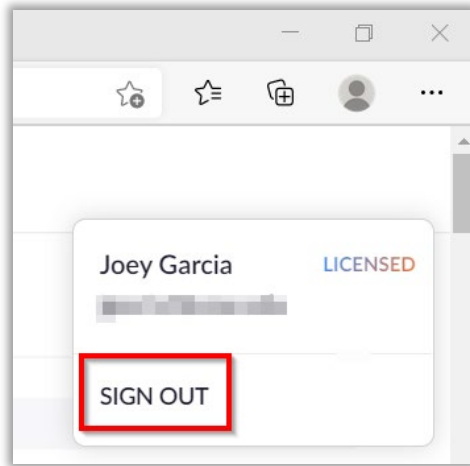4. Select **In Meeting (Basic)**
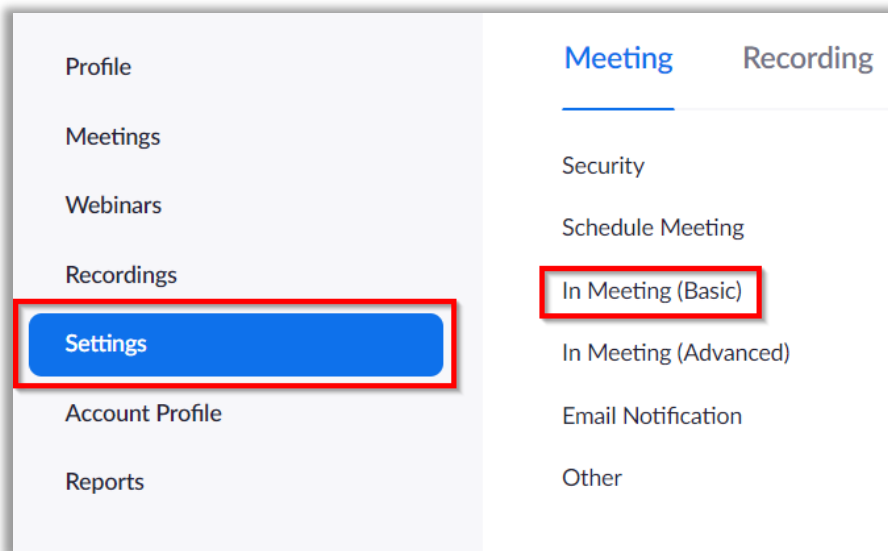
Scroll down the list to **Show Zoom windows during screen share**.

- Click the slider switch on the right, **so it appears blue.**
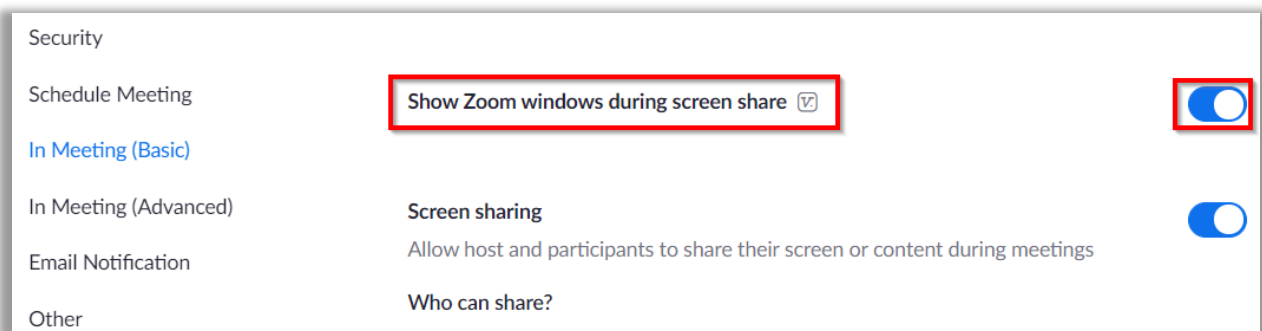
On the upper right screen click the circular personal button and select **sign out.**

To guide participants, with technical orientation, set-up the screen sharing tool through Zooms video options on the dashboard. This allows you to show your dashboard and guide participants in the uses of the tools.

1. Start Zoom
2. Open a New Meeting
3. On the Zoom dashboard, click the up arrow by the Stop/Start Video button
4. Select **Video Settings…**
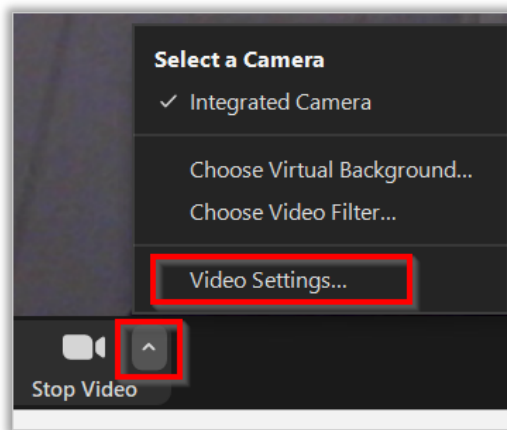
5. From the Settings options
6. Select **Share Screen**
7. **Select Show my Zoom window to other participants when I am screen sharing.**
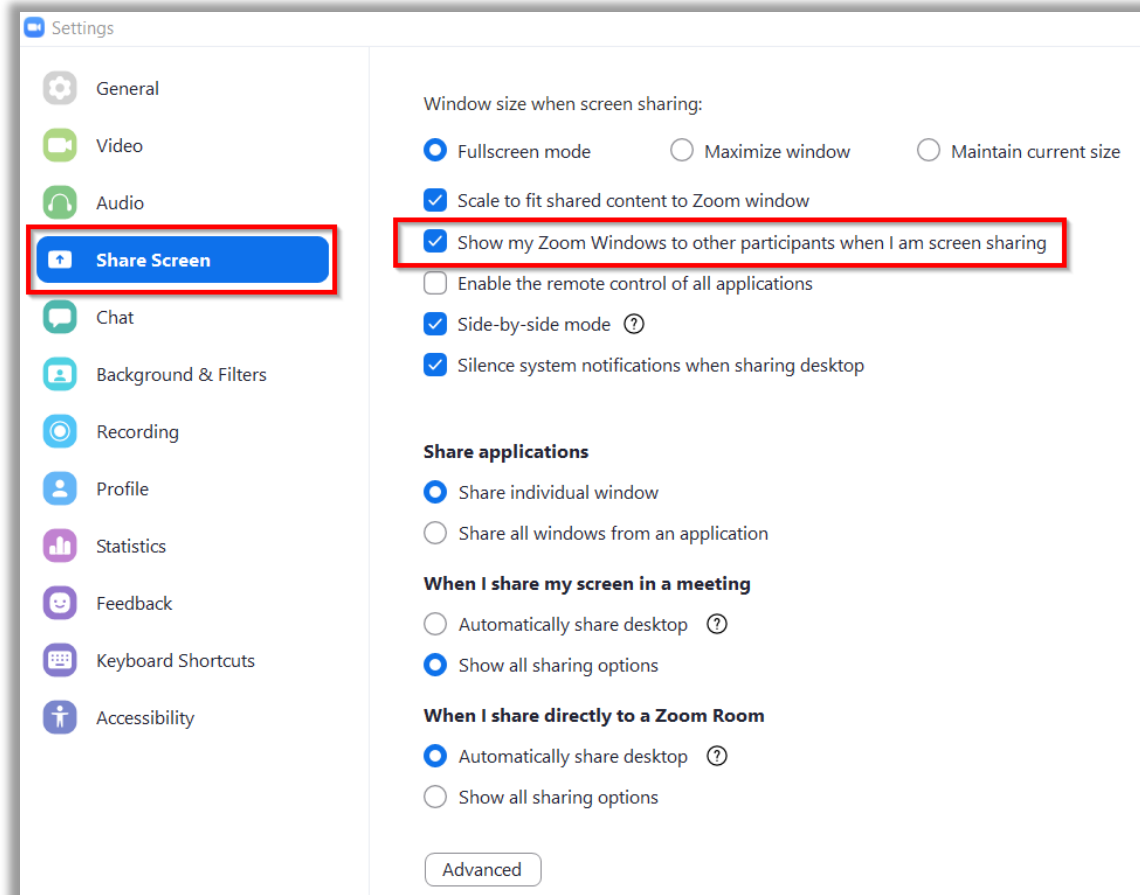
After setting up this feature, sign out of Zoom, and sign in to allow the settings to update.

This feature can be turned off after orientation by selecting:

- Video Settings
- Share Screen
- Uncheck Show my Zoom Windows to other participants when I am screen sharing

To share your dashboard, select **Share Scree** from the dashboard.
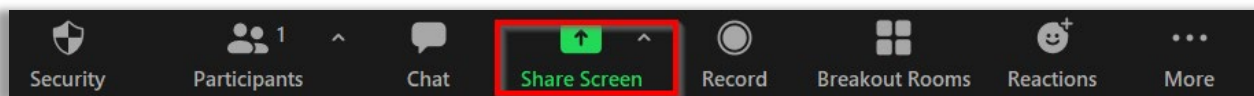
From the share screen options, select **Screen 1**
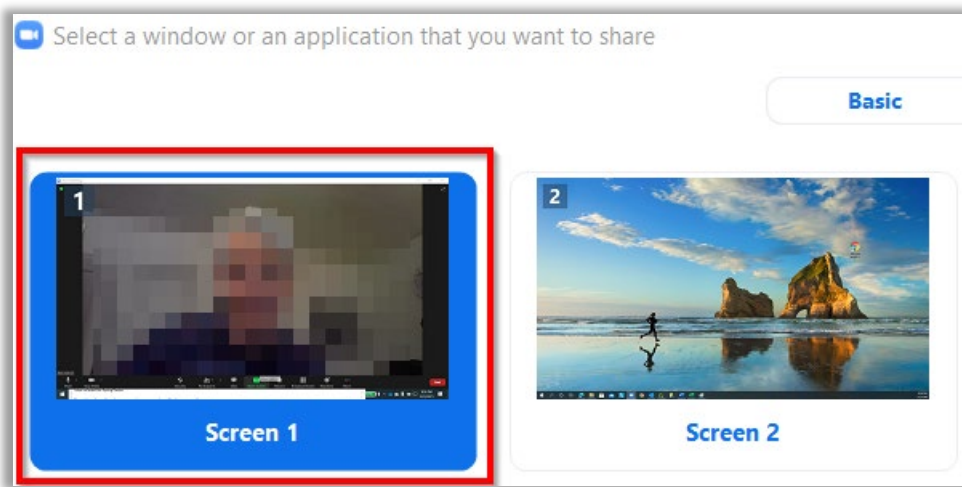
Appendix B

Orientation of the Zoom Dashboard and Tools

Encourage participants' use of the various tools to communicate and collaborate with their peers in session activities.

- Dashboard Overview use of Communication Tools

    a. Microphone, for questions, dialogue, and collaborations

    b. Video, facial expressions, and nonverbal communication

    c. Chat, for asking questions, discussions, and sharing knowledge

        i. Whole group

        ii. Private to instructor

        iii. Peer to peer

    d. Reactions

        i. Raise hand, Agreement, Laughter, Surprise, Affinity, Celebration, Yes, No, Slower, Faster
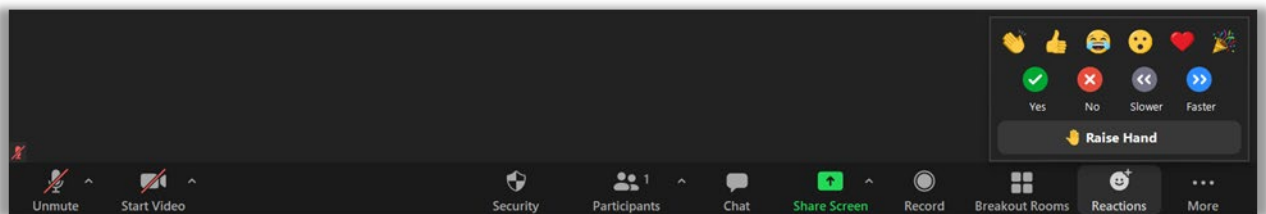
- Nonverbal reaction options in chat include:
  - Raise hand, Yes or No, Go slower, Go faster
    - More: Disapprove, Approve, Applause, Coffee break, Check the time
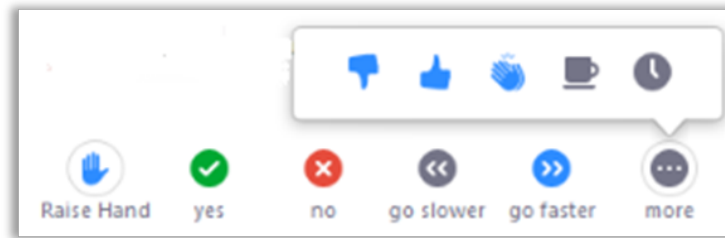
Check the host settings, to confirm Private chat is on allowing participants to send and receive private 1:1 and receive messages, if instructors wish to allow this communication.

Appendix C

Updating Zoom to Current Version

Updating Zoom to Current Version

After opening Zoom, from the main page

1. Select the blue dot with your initial on the upper right corner
2. On the dropdown menu, select Check for Updates
3. Accept the update, unless the update window confirms you are up to date.

Appendix D

Program Curriculum Draft
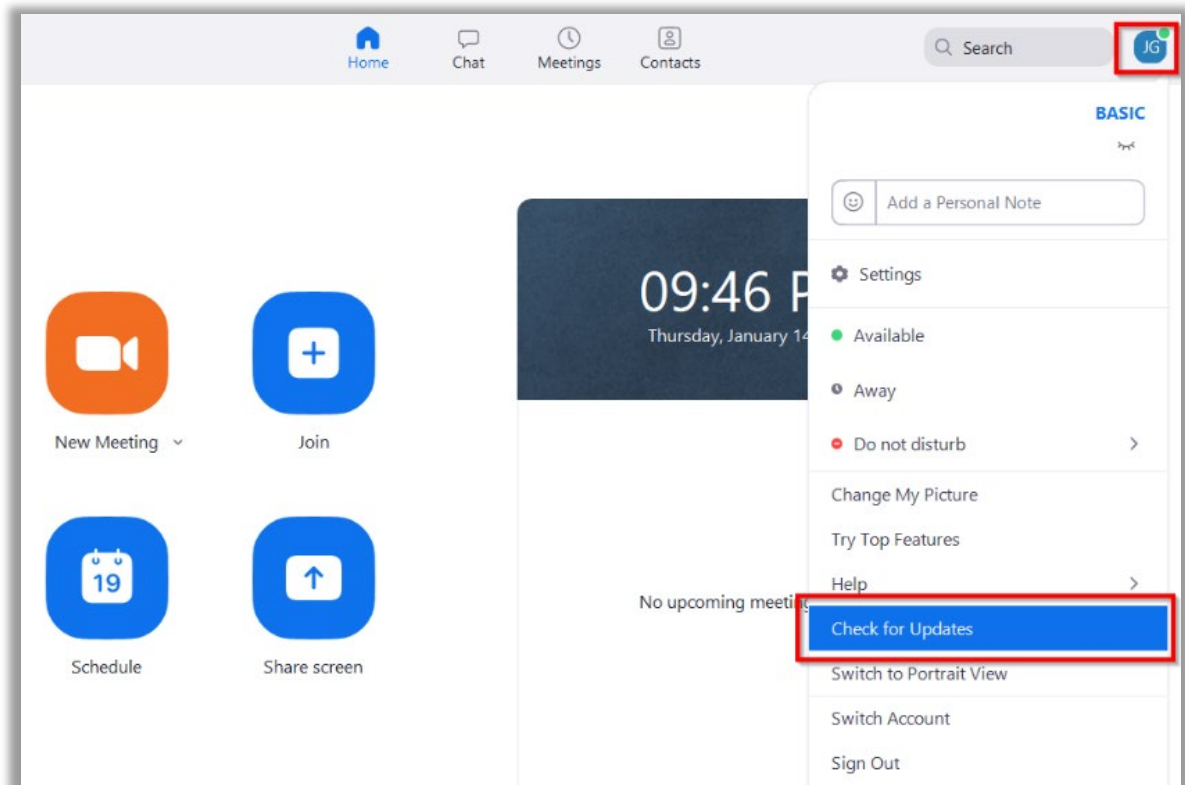
ANDERSON SCHOOL OF MANAGEMENT

Practical Project Management

Program Curriculum

Sessions 1 &2 (LaMonica) The 5 Phases of a Project
Four (4) hours of Project Overview
- Understand basic definitions
- Learn the 5 Phases and know how they are interconnected
- Introduce the 10 Knowledge Areas
- Map the 5 Phases to 10 Knowledge Areas

Sessions 3&4 (LaMonica) Project Environment
Four (4) hours of Project Environments and the Role of the Project Manager
- Understand project influences
- Distinguish between the major project influence categories
- Understand basic organizational structures
- Recognize PMO types
- Explore the various roles of project managers and necessary attributes

Sessions 5&6 (LaMonica) Stakeholder Management
Four (4) hours of Stakeholder Management
- Learn basic definitions and visualization
- Identify stakeholders
- Review a few stakeholder strategies and tools
- Understand some stakeholder tactics

Sessions 7&8 (Grant) Risks and Risk Management Plan
Two (2) hours Risk definition and Identification
- Risk Tolerance
- Risk Planning
- Risk Management Framework
- Common Risk types
- How risk impacts projects
- Calculate the impact and probability of loss that results from risks.

Two (2) Hours Risk Mitigation
- Increase your ability to prepare for and reduce uncertainty
- Understand the elements of a well-designed Risk Management Plan.
- Analyze and Prioritize Risks
- Probability Matrixes and FMEAs
- Risk responses
- Contingency Reserves and Management Reserves
- Continuous Risk Management
- Tricks and tips to identify, assess, categorize, prioritize, document, and address Risk
- Discuss real examples from your job

Sessions 9&10 (Grant) Requirements Development
Two (2) hours Requirements Development
- How Requirements development impacts projects
- Learn to ask the right questions
- Iterate and communicate the results
- Creating effective project scope statements
- Scope Creep (the Vasa from Sweden)
- Requirements gathering
- Requirements traceability
- Tricks and tips to develop Requirements and Schedules
- Real world examples from your job

Two (2) Hours Organizing work into Work Breakdown Structures (WBS)
- The Work Breakdown Structure
- Common formats of a WBS
- Level of detail and the pareto rule
- Drafting a scope of work
- Identifying task relationships
- Discuss real examples from your job

Sessions 11&12 (Grant) Schedule Development
Two (2) hours Schedule Development
- How Requirements development impacts projects
- Learn to ask the right questions
- Iterate and communicate the results
- Creating effective project scope statements
- Scope Creep (the Vasa from Sweden)
- Requirements gathering
- Requirements traceability
- Tricks and tips to develop Requirements and Schedules
- Real world examples from your job

Two (2) Hours Schedule Work Estimation
- Estimating work packages
- Types of resources
- Calculating an initial schedule
- Assign and level resources
- Resource constraints
- Schedule compression
- Discuss real examples from your job

Sessions 13&14 (Grant) Budget Development and Procurement Planning
Two (2) hours Budget Development
- How to create a budget and use it as a planning, management, and control tool.
- Various techniques for estimating costs and how and when to apply them.
- How to achieve levels of accuracy in estimating.
- How to identify cash needs and plan for cash input/output.
- Understand key PM concepts related to budget and estimating.
- How Procurement impacts projects
- Tricks and tips to acquire materials and services
- Real world examples from your job

Two (2) Hours Procurement
- Planning procurements
- Make or buy?
- Triple bottom line
- Contracting tools
- Basis of estimates
- 3 common contract families (FFP, Cost +, Hybrids)
- Contract dispute techniques
- Discuss real examples from your job

Sessions 15&16 (Grant) Project Monitoring and Control
Two (2) hours Quality Management
- How to plan quality management
- Dimensions of quality
- Cost of quality (Conformance and non-conformance)
- Quality assurance vs quality control
- Quality assurance tools
- Quality control tools
- How Quality impacts projects
- Tricks and tips to acquire materials and services
- Real world examples from your job

Two (2) Hours Monitoring and Controlling (M&C) Project Work
- Learning curve and impact to M&C (Boeing case study)
- Controlling project work
- Integrated Change Control (ICC)
- Validating scope
- Lean wastes and techniques
- M&C tools
- Analytical Tools (a handout to review of Analytical tools)
- How M&C impacts projects
- Discuss real examples from your job

Sessions 17&18 (Grant) Communication and Project reporting

- Two (2) hours Reporting and Project Closeout
- How to plan reporting
- Reporting tools and dashboards
- Interactive vs Push vs Pull information
- Communication skills
- Communication Management Plan
- Reporting
- Report frequency and topics
- Types of reports
- Rules of performance measurement
- Closing projects
- Files to maintain
- Post project reviews and recognition
- Tricks and tips to acquire materials and services
- Real world examples from your job

Two (2) Hours Practical (hands on) Kaizen event
- Common project problems
- Sort issues using the Affinity Diagram
- Break down and perform dot voting
- Select top two and perform popular vote
- Chart on a Ishikawa to begin root cause Analysis
- Apply the 5 Why's tool
- "Fist of five" voting to build consensus
- Breakdown issue to root cause (vs symptom)
- Move to pareto chart
- Report out to team
- Discuss real examples from your job

Sessions 19&20 (LaMonica) Project Integration w/Business Requirements

Four (4) Hours Project and Business Integration
- Review the Knowledge Areas
- Explore useful templates
- Understand basic business requirement knowledge
- Determine business requirement skills
- Discuss various approaches for working with stakeholders

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Appendix E

Program Files in OneDrive

Appendix F

Team Roster Role Assignments

Practical Project Management — Anderson School of Management

- **Facilitator**
  - Calls on team members for input.
  - Manages time and keeps the group on task.

- **Note taker/Presenter**
  - Records the activity information during the activity.
  - Shares or presents the information to the larger group in reflections.

Team Roster		Week 1				Week 2				Week 3				Week 4				Week 5				Week 6				Week 7				Week 8				Week 9				Week 10			
		2/23/2021		2/25/2021		3/2/2021		3/4/2021		3/9/2021		3/11/2021		3/16/2021		3/18/2021		3/23/2021		3/25/2021		3/30/2021		4/1/2021		4/6/2021		4/8/2021		4/13/2021		4/15/2021		4/20/2021		4/22/2021		4/27/2021		4/29/2021	
Team	Name	Facilitator	Note taker Presenter	Facilitator	Note taker Presenter	Facilitator	Note taker Presenter	Facilitator	Note taker Presenter	Facilitator	Note taker Presenter	Facilitator	Note taker Presenter	Facilitator	Note taker Presenter	Facilitator	Note taker Presenter	Facilitator	Note taker Presenter	Facilitator	Note taker Presenter	Facilitator	Note taker Presenter	Facilitator	Note taker Presenter	Facilitator	Note taker Presenter	Facilitator	Note taker Presenter	Facilitator	Note taker Presenter	Facilitator	Note taker Presenter	Facilitator	Note taker Presenter	Facilitator	Note taker Presenter	Facilitator	Note taker Presenter

Appendix G

Weekly Roster Role Assignment

		Week 2			
Team Roster		3/2/2021		3/4/2021	
Team	Name	Facilitator	Note taker Presenter	Facilitator	Note taker Presenter

Practical Project Management

- **Facilitator**
  - o Calls on team members for input.
  - o Manages time and keeps the group on task.

- **Note taker/Presenter**
  - o Records the activity information during the activity.
  - o Shares or presents the information to the larger group in reflections.

Appendix H

Activity Time Frame Group Size Formula

Activity Time Length, Number of Groups & Sizes						
Time Measured in Minutes				**Number & Size of Groups**		
Time for Breakout Activity	Total Time for Reflections	Total time for Activity	Time for each Group Reflection	Total Number of Participants	Number of Groups	Size of each Group
Enter	Enter	Based on breakout Activity+Time for Reflection	Based on, Total Time for Reflections/Number of Groups	Enter	Enter	Based on Total Participants/Number of Groups
12	6	**18**	**1**	36	6	**6**

Appendix I

Adding Poll Questions using the Web Portal.

1. Sign into the Zoom web portal. unm.zoom.us?

2. Go to the Meetings page and click on your scheduled meeting.
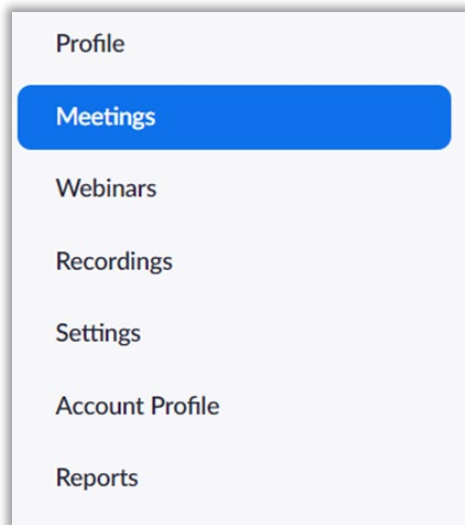
3. Scroll to the bottom to find the **Poll** option.

4. Click **Add** to begin creating the poll.
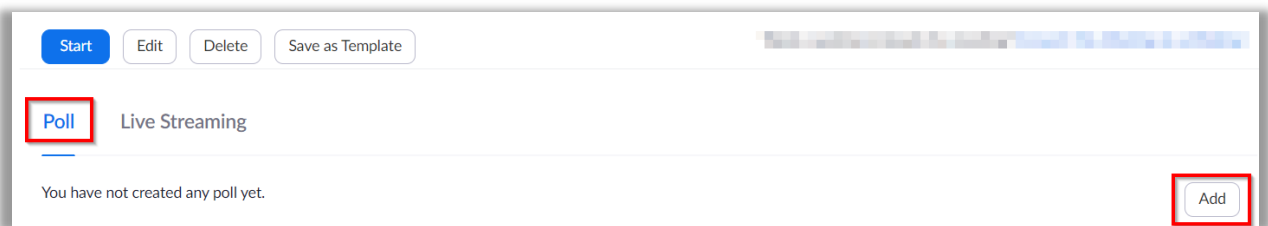
5. Enter a title and your first question.

    a. (Optional) Click the **Anonymous** check box to make the poll anonymous, which will keep the participant's polling information anonymous in the meeting and in the reports.

b. Select whether you want the question to be **single choice** (participants can only choose one answer) **or multiple choice** (participants can choose multiple answers).

6. Type in the answers to your question and click **Save** at the bottom.

7. If you would like to add a new question, click **Add a Question** to create a new question for that poll.

Launching a poll during a session

1   Start the scheduled Zoom meeting that has polling enabled.

2   Click **Polls** in the meeting controls.
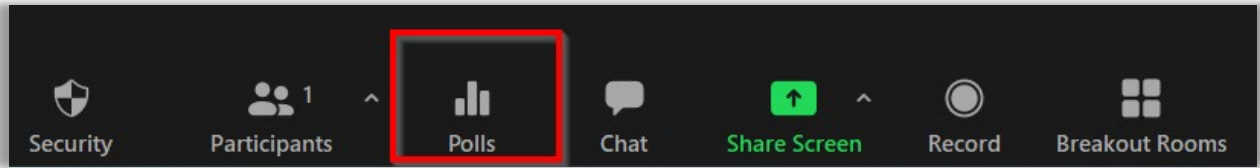
3   Select the poll you would like to launch by clicking on the **down arrow** and viewing the options.

4   Click **Launch Poll**.
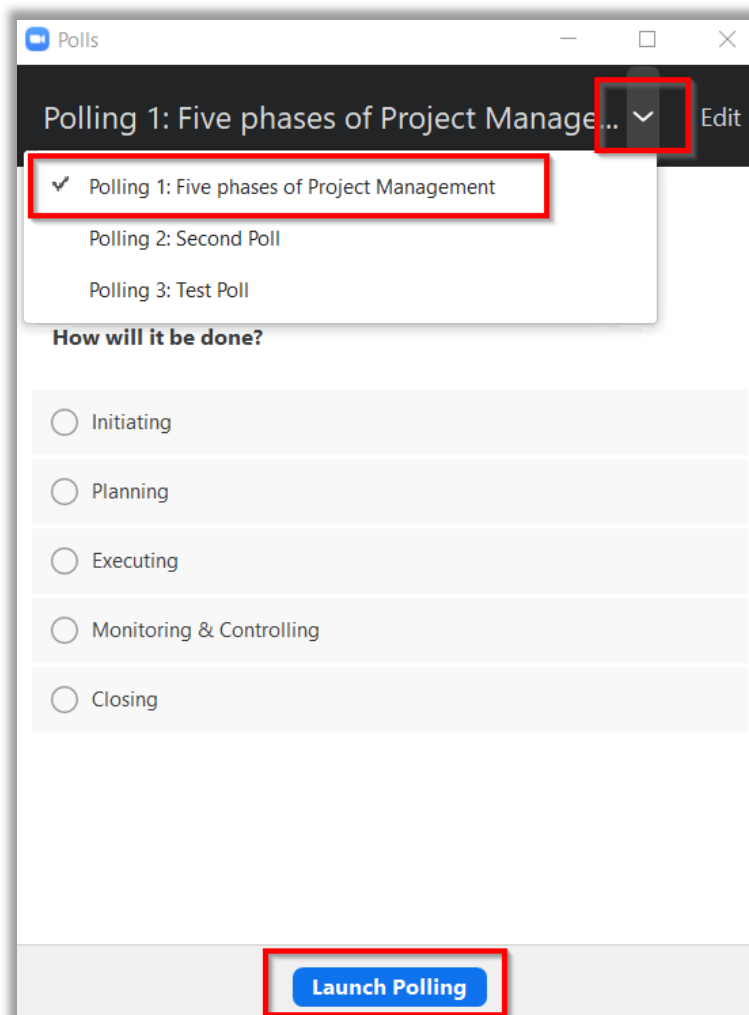
5   The participants in the meeting will now be prompted to answer the polling questions. The host will be able to see the results live.

6   Once you would like to stop the poll, click **End Poll.**
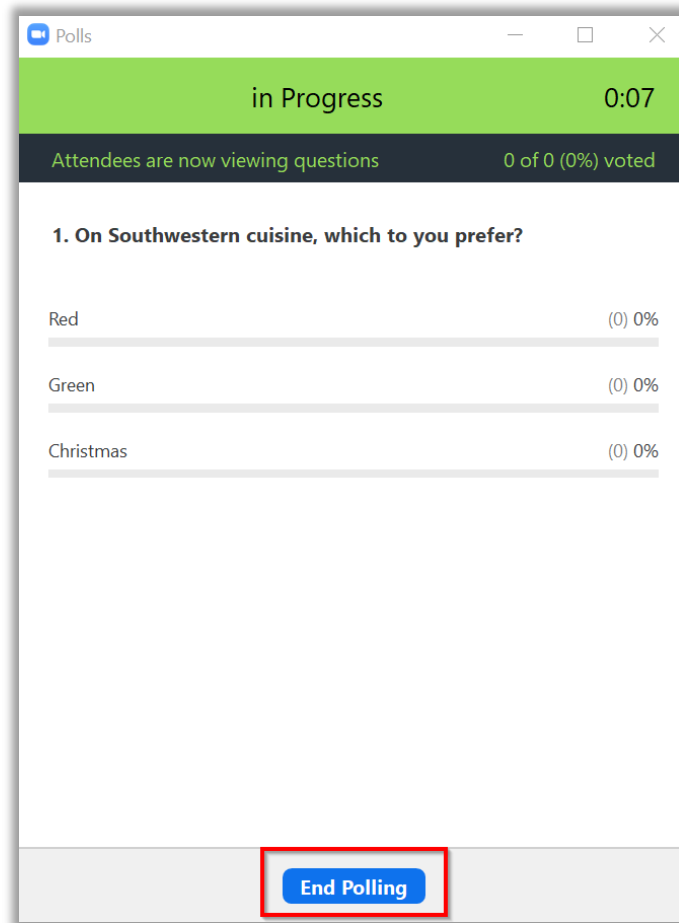
7   To share the results to the participants in the meeting, click **Share Results.** Participants will then see the results of the polling question
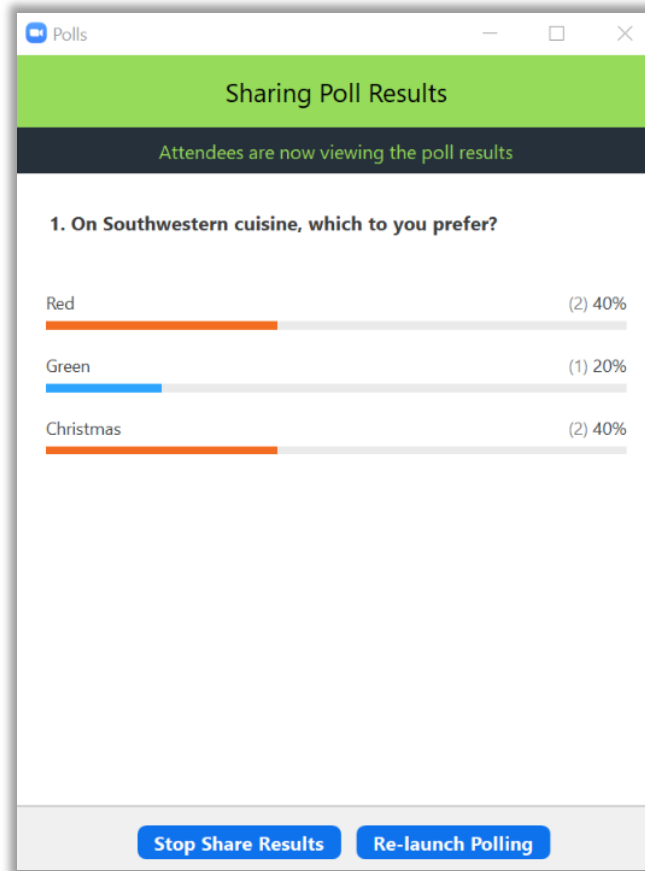
8   (Optional) To view the full report for this poll, click the Download button. This will launch your default web browser so that you can download the entire poll report, which shows what each participant chose, instead of the percentages of each choice.

For current documentation on Zoom processes, open your Zoom portal and select Video Tutorials or visit http://zoom.us, Resources, Video Tutorials.

References

Gunawardena, C. N., Frechette, C., & Layne, L. (2019). *Culturally Inclusive Instructional Design: A Framework and Guide for Building Online Wisdom Communities.* New York, NY: Routledge.

Gunawardena, C. N., Zittle, F. J. (1997). Social presence as a predictor of satisfaction within a computer-mediated conferencing environment, *American Journal of Distance Education, 11*(3), 8-26.