

**Blended Learning and the Global South. Virtual Exchanges
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Stakeholder Struggles in the Uptake and Use of Blended and Online Learning in Higher Education

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Abstract Recommendations for greater adoption of blended and online learning pedagogies pre-date COVID-19 by many years. However, the uptake and implementation of blended and online learning was largely ignored by lecturers in many contact institutions, despite the introduction of policies and various resources to support such a shift. In this chapter, we critically explore the reluctance of lecturers to adopt blended and online learning pedagogies, drawing on the Epistemic Pedagogic Device (EPD) of Legitimation Code Theory (LCT) and the elements of Archer's theory of Social Realism to explicate the roles and contestations among the various stakeholders involved in teaching and learning in higher education institutions. In particular, we examine the struggles for legitimacy faced by instructional designers and academic developers in the sites of teaching and learning, sites which have traditionally been controlled by lecturers. We posit that successful, sustainable implementation of online and blended learning requires institutional recognition of multiple stakeholders as legitimate role-players in teaching and student learning.

Keywords Blended learning. Online learning. Instructional design. Institutional culture. Educational change.

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1 Introduction

Higher Education (HE) institutions are well established environments of contestation (Shay 2015). They are spaces rich in knowledge production where new ideas are constantly conceptualised, tested and debated, and when these are legitimised through scientific proof or consensus, lead to profound technological advancements as well as significant shifts in societies. It is perhaps ironic then that while universities are celebrated for being drivers of innovation and change, pedagogical practices within these institutions are generally static, with traditional, face-to-face teaching methods and sit-down invigilated assessments still dominating in some universities despite the availability of alternative modes of engaging with students, including blended and online learning options (Blin, Munro 2008). Even during the circumstances of Emergency Remote Teaching (ERT) during the current COVID-19 pandemic, observations at our institution suggests that while many academic staff have transitioned their courses to online spaces, trying to retain disciplinary and pedagogical integrity, others appear reluctant to pursue possibilities for transforming their teaching and assessment practices, not seeing long-term pedagogical benefits.

McShane (2004) and Blin and Munro (2008) report some of the reasons for the lack of uptake of blended and online learning to be technical and infrastructural issues, logistical issues, absence of e-policies as well as lack of staff motivation and training and their resistance to change. Similar constraints were presented by McShane (2004) as well as Jones (2008), who both mention themes such as the lack of familiarity with online technologies, infrastructure constraints, workload concerns and lecturers' belief in the value of traditional face-to-face pedagogies over digital pedagogies. More recently, Badroodien, Fataar (2020) and Czerniewicz et al. (2020) all highlight the problematic pursuit of online learning in a context of unequal access and socioeconomic inequality, with Badroodien and Fataar (2020) also noting the challenge of student isolation. Both studies draw attention to the 'need for human connection' and the importance of mechanisms for supporting ongoing interactions in virtual classrooms – a timely reminder of the notion of "high tech, high touch" first proposed by Naisbitt in 1984 (cited in Bourner, Flowers 1997).

Therefore, to ascribe resistance to change to lecturer recalcitrance alone would be reductionist. A deeper, system-wide approach is needed to examine how the various components interact and influence each other to either maintain the status quo or bring about change. In this chapter we offer a systemic view of the interplay of factors influencing slow adoption of technology based on the notion of academia as a site of struggle (Bourdieu 1998). The introduction of blended and online learning in Higher Education (HE) may thus, have highlighted some of the long existing struggles between traditional stakeholders: uni-

versity managers, lecturers and educational developers (higher education teaching and learning specialists) in addition to triggering new struggles with more recent stakeholders (instructional designers).

We delve deeper into these stakeholder interactions and contestations using an explanatory framework created by overlaying the key elements of Archer's Social Realist Framework (structure, culture and agency) into the analytical framework of the Epistemic Pedagogic Device (EPD) of Legitimation Code Theory (LCT) (Maton 2014). Using this integrated framework, we illustrate how HE stakeholders, the positions and roles they occupy, and access to material resources, influence the struggles that play out in the social fields of practice in HE, and how responses to technology-enhanced teaching and learning could be a manifestation of various struggles for legitimate participation in these fields. We discuss how lecturers, buoyed by entrenched cultural and structural factors, have maintained control and collectively held the teaching and learning system in stasis. We then consider how the introduction of technology and two notable events in higher education in the last five years (*viz.* #FeesMust-Fall protests and the COVID-19 pandemic) triggered shifts in the dynamics within teaching and learning and influenced the adoption of blended and online learning, and we conclude with a reflection on what is needed to expand and sustain these shifts.

2 Overview of the Frameworks of Social Realism and Legitimation Code Theory

Attempting to understand the nature of change in the HE system often involves assumptions about the nature of the system and observed stagnations or changes within the context of the HE landscape. However, these assumptions may be influenced by individual perceptions and beliefs (i.e. axiological underpinnings), and may therefore be an underestimation or overestimation of the 'real' causes of change. According to Archer's Social Realist theory (Archer 1996, 2013; Archer et al. 2013), the potential for false or misinformed notions of the causes of change are referred to as "epistemic fallacies" (Archer 1996, 2013). Social Realism provides an analytical and explanatory framework to illustrate how complex effects or social events arise (e.g. how changes in South African HE occur or remain unchanged) (Boughey, Niven 2012; Quinn 2012), without falling into the trap of epistemic fallacies by examining the forces, processes or mechanisms that drive and shape them. Social Realism therefore provides a powerful mechanism for examining the complexities underpinning lecturer responses to blended and online learning. The three interrelated dimensions of social realism described below, highlight the complexities of understanding technological interventions as enhancing learning experience for students.

Social Realism is based on the existence and interactions between people (agents) and the ‘parts’ (structure and cultural artefacts) in any social system/society (Archer 2013). When it comes to structural issues, viewing the university as a contained sub-system within the broader HE system, structural artefacts may include physical classrooms and associated infrastructure, or structuring documents such as national and institutional policies. Structural artefacts may also include other forms of social structuring such as position and status or social class, gender and race, as well as material resources such as funding and government subsidies. These structural artefacts impose certain organising principles on the teaching and learning system. However, these organising principles do not exist in isolation and the extent to which the principles are implemented is directly dependent on the beliefs, values and ideologies held by the individuals within institutions (i.e. institutional culture).

In discussions of institutional culture, it is seen to be learnt through social interactions or through reading and contextualising information, and it may be shared with others (Archer 2013). This includes the beliefs and values that dominate, as well as the sets of ideas governing what constitutes legitimate knowledge and practices in a given context (e.g. HE) (Archer 2013). However, culture on its own, like structural artefacts, cannot operationalise the system. It requires individual agency for the cultural values to be embodied through the occupation and enactment of particular social roles and the use of structural artefacts available through those roles, to defend individual interests and to realise personal goals (Archer 2013). It is in the interplay between structures, culture and individual agency [fig. 1] that the organising principles materialise.

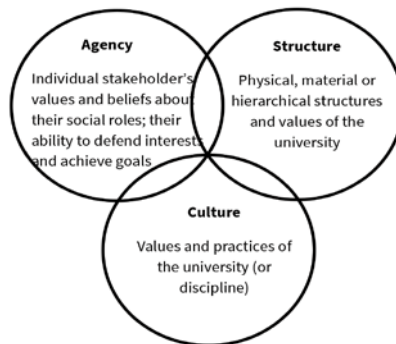


Figure 1 The interplay between structure, culture and agency set the organising principles for pedagogical practices, including blended and online learning

Legitimation Code Theory (Maton 2013) can be applied as an analytical tool for illuminating struggles of legitimacy among various stakeholder and for understanding what counts as legitimate knowledge in social fields like HE. Located in the sociology of education, it is also underpinned, in part, by critical realist philosophy and social realism. LCT locates the interactions between agents and the structures and culture in which they operate within particular fields of social practice, delineating the contexts in which different social practices occur and in which struggles for control may arise.

In HE, these fields of social practice can be described through the use of the Epistemic Pedagogic Device (EPD), where practices of lecturers can be defined as operating in three field of practice, viz., the field of *production* (where new knowledge is created through research), the field of *recontextualisation* (involving the curricularisation of disciplinary knowledge), and the field of *reproduction*, where disciplinary knowledge is pedagogised [fig. 2] (Maton 2014, 51). Within these fields, struggles may arise as different stakeholders within these fields compete explicitly or tacitly for status, resources and legitimacy, based on the specific knowledge practices occurring in each field. This, in turn, is shaped by particular organising principles (logics) or legitimation codes (Maton 2014). The recontextualisation field, for instance, is shaped by recontextualising logics while the reproduction field is influenced by evaluative logics (the latter being the field in which pedagogical choices must be made).

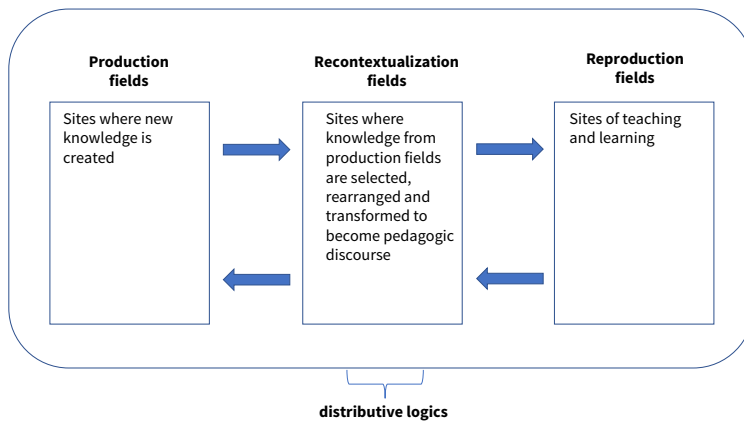


Figure 2 The Epistemic Pedagogic Device in LCT (Maton 2014, 51)

It is the fields of recontextualisation and reproduction that are of primary interest in our interpretation and conceptualisation of resistance to blended and online learning by university lecturers.

3 Stakeholders in the Fields of Recontextualisation and Reproduction

In the current conceptualisation of the adoption of blended and online learning by lecturers in the recontextualisation field within HE in South Africa, the key stakeholders (i.e. agents holding particular ideological positions and operational roles), include national policy makers such as the Council on Higher Education (CHE), professional accreditation bodies, institutional administrators, course coordinators, individual lecturers, and to some extent, educational developers [fig. 3]. Arguably, lecturers are the corporate agents (Archer 2013) within this field, dominating curriculum decisions such as the selection and sequencing and transformation of disciplinary knowledge into forms that are more accessible for students. Although curriculum choices and decisions are also influenced by national and institutional policy makers, professional accreditation bodies as well as institutional managers who maintain significant control through numerous policies and, notably, the distribution of material resources such as funding and infrastructure, lecturers still maintain a greater degree of power and control in this field.

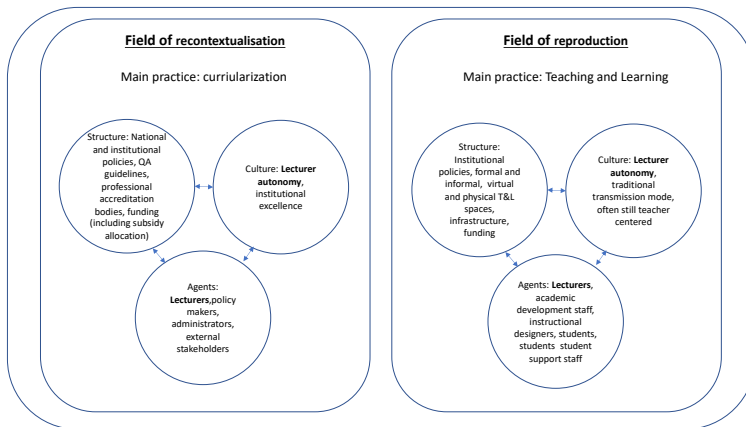


Figure 3 Decisions regarding the use of blended and online learning occur primarily in the fields of recontextualisation and reproduction. Although influenced by many stakeholders, these fields have traditionally been dominated by lecturers (indicated in bold)

The field of reproduction (also shown in figure 3), is similarly influenced by institutional policy but controlled by lecturers through their pedagogical practices in their particular courses and in the confines of their lecture rooms. Lecturers make 'expert' pedagogical choices based on their own intuitions as well as their trained understand-

ing of the knowledge of their disciplines and their often-tacit understanding of what is valued in their disciplines (Ferman 2002; Hannah, Stewart, Thomas 2011). Students are also key stakeholders in the field of reproduction in HE, but their agency may remain limited due to the transmission mode of teaching that still dominates (Massouleh, Joeghani 2012). However, in attempting to persuade lecturers to adopt blended and online learning methods, university administrators may unintentionally have triggered previously limited struggles for control of the EPD in the field of production – between the lecturers on the one hand, and various other stakeholders, on the other.

As will be explained next, this struggle could partly have been a consequence of how e-learning was introduced and continues to be championed, the nature of blended and online learning, the lack of suitable structural and cultural conditions for the effective uptake and use of technologies for teaching and learning

4 Adoption of E-Learning Pedagogies in Higher Education

Güzer and Caner (2014) and Dziuban et al. (2018) highlight that blended and online learning has (and continues to be) presented as one of the great revolutions in contemporary higher education with significant potential to solve a host of ills and challenges facing the Higher Education sector. From being purported as the solution to increasingly large classes as universities have massified, to generate much-needed institutional funding to addressing issues of historical restrictions to formal access (particularly in countries like South Africa), online learning has been punted by university administrators as an essential component of the academic project. Appana (2008) highlights other advantages of blended and online learning such the notion that online courses may offer cheaper alternatives for students, not only in terms of reduced course fees, but also in terms of eliminating accommodation, travel and other incidental costs associated with campus-based learning, as well as potential time-saving benefits for staff, especially when dealing with large classes. In addition, proponents of online learning usually emphasise the flexibility of online courses, highlighting that with the unbundled, online courses, students would have greater autonomy in terms of what, when and where to study, as well as the increasingly widespread belief that completion of online courses may signal to potential employers an individual's intrinsic motivation and ability to self-regulate (Littlejohn et al. 2016).

Interestingly, initial publications on online learning tended to focus less on the technologies and more on the pedagogical issues of shifting into a virtual teaching and learning environment (Cole 2000; McLoughlin 2001; Harper, Chen, Yen 2004). It was not long however, before the emphasis shifted away from pedagogical considera-

tions towards technological issues, triggered by the publication and widespread adoption of design and development frameworks like the Analysis, Design, Development, Implementation, and Evaluation (AD-DIE) model (Molenda 2003; Branch 2009). This systematic approach to instructional development presented the opportunity to streamline the process of online course design. More recently, institutions worldwide also started to invest heavily in infrastructure development, including attempts to provide stable and effective Learning Management Systems (LMSs), as well as data and devices for students in better resourced universities (Güzer, Caner 2014). Weller (2016) however, suggests that it is insufficient to justify the use of learning technologies purely on the basis of their affordances. Other authors such as Guri-Rosenblit (2005), Watson (2001) and Njenga, Fourie (2010) also note the shortcomings and potentially negative impacts of e-learning for students and staff, cautioning against the uncritical adoption of educational technologies. In our institutional context, other unexpected challenges have emerged, such as the formation of a continuum of ideological and operational clusters within the field of reproduction.

5 Struggles for Legitimacy of Instructional Designers

In our role as Teaching and Learning advisors at our institution we have observed a level of scepticism among both lecturers and educational developers regarding the rise of instructional designers as a key category of staff in Higher Education institutions. Compounding the scepticism was the structural separation that began to emerge as new centres for digital learning were established, facilitated by various public and private partnerships for the development of MOOCs and online short courses which, administrators argue, could address issues of social justice while also generating substantial income through course fees. Globally and locally, universities also introduced various policies aimed at facilitating the shift to online learning (Bramoh, Lekoko 2005; Brown, Anderson, Murray 2007). However, much like educational developers' struggles for legitimacy (Boud, Brew 2013), instructional designers have found themselves facing a crisis of legitimacy despite their unique multidisciplinary perspectives and their potential to create new possibilities for learning and professional development (Keppel 2007). Schwier, Campbell and Kenny (2007) also highlight the significant constraints to agency and personal effectiveness experienced by instructional designers. More recently, a review by Wager (2021) addressed the issue of rebranding and reconceptualizing the role of instructional designers as learning experience designers. Such deliberate rebranding, coupled with the view that instructional design should encompass both

technical and pedagogical knowledge and skills for effective blended and online course design (Sahin 2009), have triggered greater acceptance and integration of instructional design staff into the field of reproduction, with varying degrees of success.

6 Higher Education Is Slow to Change

Despite these structural evolutions, including significant structural support at our institutional and at national levels, our experience as specialist in higher education has shown that traditional modes of teaching have persisted. This can be attributed to an institutional culture that values academic autonomy and the belief amongst some lecturers at our university that university teaching is an innate skill that develops alongside disciplinary expertise, rather than an evolving professional practice that can be developed through training.¹

Coupled with the view held by some lecturers of teaching as an act of transmission of knowledge, is the view of students as passive participants in the learning process. This view that is greatly challenged when learning shifts into the online environment, which requires significantly more active participation and a high degree of self-directed learning (Krull, Duart 2018).

Unpublished data from surveys of staff perceptions of self-directed learning conducted at the School of Education at our institution in 2019 show that while most lecturers surveyed support the notion of self-directed learning (and many believe it to be a critical skill that students should develop), many argue that students do not necessarily know how to direct their own learning, a view confirmed by students surveyed in the same study. Students' digital literacy capacity and their ability to engage effectively in the online learning environment may still need further development, despite students being digital natives and students' use of social media (Tang, Chaw 2016; Czerniewicz et al. 2020). The COVID-19 pandemic also foregrounded lecturers' concerns about the quality of online assessments and the potential for greater levels of cheating and plagiarism online (Nguyen, Keusemann Humston 2020) and the trend towards greater adoption of digital proctoring and the unknown consequences thereof (Lee et al. 2020), and struggles with these concerns may inadvertently increase the reluctance of some lecturers to sustain emergent online pedagogical practices and result in a reversion to pre-COVID-19 norms.

¹ University of the Witwatersrand, Johannesburg, *Framework for Continuous Professional Learning of Academics as University Teachers*, 2019. <https://www.wits.ac.za/media/wits-university/learning-and-teaching/documents/Framework%20for%20CPL%20For%20Academics%20as%20University%20Teachers.pdf>.

7 **Blended and Online Learning as an Outcome of Cultural and Structural Morphogenesis**

Within in the context of Social Realism, Archer refers to a stable social system as “morphostatic” (Archer 2011, 2013). When that stability is disrupted (by a break in tradition or a change in material circumstances or governance, for instance), contextual incongruence arises, resulting in morphogenesis and the formation of a “morphogenic society” (i.e. a society in a state of dynamic flux) (Archer 2011, 2013). It can be argued that the push for online learning from the mid 2000s triggered a disruption in the distributive logics within the fields of recontextualisation and reproduction. However, the prevailing culture at our institution, that foregrounds lecturer autonomy, enabled lecturers to continue to maintain control of the EPD in these fields. Lecturers have largely remained in control of curriculum design, development and enactment (based on their disciplinary expertise) and continued to teach based on their own experiences and observations of teaching, an approach described by Borg (2004) as the apprenticeship of observation. This culture was however, challenged by student protests of 2015 which highlighted the call for decolonisation of higher education in South Africa (Griffiths 2019).

Heleta (2016) argues that the student protests and their calls for decolonisation presented major structural and cultural shifts in teaching and learning. Lecturers were suddenly confronted not only with the reality of universities as legacies of epistemic violence but more personally confronted with issues of power relations that underscored teaching and learning. More pertinently, lecturers in South Africa were also forced into using the online learning platforms that had largely been ignored till then. The protests also tipped the legitimacy scales in favour of both educational developers (who were requested to guide lecturers through the process of decolonising their curricula and assessments), and instructional designers (who were needed to guide staff to use the learning management systems more effectively). Still, unpublished data from an informal surveys conducted at our institution showed that most lecturers used the LMS as a repository for PowerPoint presentations and other resources rather than creating authentic online learning experiences for students.

Although lecturer use of LMS and technology appeared limited in our context, mainly due to infrastructure bottlenecks and a lack of technical skill on the part of lecturers to use the LMS effectively for learning, at a national level, the student protests did appear to trigger a shift in student agency as well as small but notable shifts in institutional cultures (Heleta 2016). Lecturers across South Africa were more aware of students’ challenges and their feelings of alienation and disconnection from the academic project, and numerous na-

tional teaching and learning dialogues on decolonisation meant that lecturers were gradually coming to see students as important stakeholders in the field of recontextualisation.

The COVID-19 pandemic however, has created the conditions for a possibly more enduring shift towards online and blended learning. University administrators, locally and internationally, swiftly moved the academic programme online, and many of the persistent infrastructure issues were rapidly addressed. At our institution, students in need were loaned devices and all students provided with data. The access issues were therefore addressed (at least temporarily) to a much greater extent than before. The rapid transition also meant rapid upskilling for lecturers, who have spent significant time and effort on learning about online course design and simultaneously developing and running their courses. In addition, educational developers and instructional designers appear to have found themselves on more solid footing in their efforts to support lecturers achieve emergency remote teaching and learning. Students too, have, out of necessity, found themselves playing a significantly more active role than in the face-to-face teaching and learning environment, as they meet the challenge of directing and managing their own learning journeys in less formal, virtual settings. In the current South African context, we have noticed a marked increase in the willingness of lecturers to engage with blended and online pedagogies as a result of this confluence of structural enablements. However, there is also recognition that the teaching and learning taking place now cannot be characterised as true online learning, nor is it a proper blended learning (Hodges et al. 2020).

Hodges et al. (2020) compare the differences between effective online teaching which functions as a learning community for supporting learners with “co-curricular and other social supports”, and emergency remote teaching which does not function within an ecosystem and which “provides temporary access to instruction and instructional supports in a manner that is quick to set up”. The authors argue against equating the two, especially when evaluating how well they are working. Nevertheless, this forced shift has provided the opportunity for staff to prototype new pedagogical practices, and reflect on old practices more deeply and critically. The question that remains however, is how willing academic staff are to learn lessons based on their experiences in ERT to improve their teaching practices either in face-to-face or online modes of teaching, especially given the push for flexible learning options in many institutions. The key question is what factors and conditions will be required to sustain emergent practices in the longer term.

8 Long-Term Sustainability is Dependent on Greater Collaboration in the Field of Recontextualisation

The struggles for control of the different epistemic fields of the EPD, and the power and status afforded by that control, is not new to the academe. Higher Education institutions are also known to be slow to change and attempts to shift the balance of control is usually countered by opposing forces seeking to maintain the *status quo* (Barber et al. 2013). As evidenced in the literature and in this chapter, this has indeed been the case with blended and online learning. For as long as the cultural (and structural) features of institutions have remained fairly static, lecturers in traditional contact institutions were able to limit their technology usage and maintain control of the field of reproduction. As discussed, the COVID-19 pandemic has triggered a significant morphogenetic shift, accelerating the transformations that have been gradually occurring over last 20 years.

Nonetheless, long-term sustainability of the blended and online pedagogies depends greatly on whether the structural measures put in place now, such as the provision of devices and data, can be maintained. Also needed is sustained recognition of university teaching as a professional practice requiring appropriate professional education as well as sufficient time to engage with this knowledge base (a point highlighted and structurally reinforced in the National Framework for Enhancing Academics as University Teachers).² This framework also notes that the ability to provide 21st century skills depends on lecturers' ability to approach teaching and learning differently and work effectively with a range of traditional and digital pedagogies, and on collaboration among diverse stakeholders. This recommendation is strongly supported by Jacobs's concept of "collaborative pedagogy" (2007), which offers a persuasive argument for collaboration between stakeholders (academic staff, instructional and educational developers) in a context of disruption and change. Although Jacobs proposes collaboration between language and disciplinary specialists to promote discipline based, critical literacy practices in HE institutions, we propose that the same principles pertain to finding discursive spaces for embedding blended and online learning pedagogies. The goal is to provide discursive spaces for stakeholders to become reflexive about ideologies, values and beliefs rather than being caught up in institutional contestations. Jacobs (2007) suggests that such collaboration can enhance partnerships and interactions in communities of practice and consequently enable greater mutual knowledge building across various learning environments.

² Council on Higher Education, *National Framework for Enhancing Academics as University Teachers*, 2018. https://heltasa.org.za/wp-content/uploads/2020/08/National-Framework-for-Enhancing-Academics-as-University-Teachers_signed.pdf.

9 Conclusion

Having examined the uptake of blended and online learning using a systems approach, we have sought to illustrate the complexities involved in transforming pedagogically sound technological practices within a social realist paradigm. We have argued that structures are required to enable meaningful collaboration so that different stakeholders can induct themselves into new discourses of practice. If supported by enabling policies, adequate resources and democratic leadership structures with inclusive departmental cultures, spaces will open up for lecturers to embed technological practices into their disciplines to enhance the learning experience for their students. In many of the recent accounts of the impact of digital technology on higher education teaching and learning, lecturers are called upon to interrogate the nature of the learning opportunities created through “technology-enhanced learning” through critical questioning (Weller 2016, 190).

As teaching in Higher Education is generally characterised by the stability (morphostasis) of existing institutional structures and cultures, we have shown how the teaching, learning and assessment processes may be preserved by lecturers and may remain static. However, we have also shown that transformative processes may be triggered by periods of disruption which tend to bring to the fore the legitimacy, expertise and agency of other stakeholders such as educational developers and instructional designers within the field of reproduction.

We suggest that for emergent practices to be sustained beyond periods of disruption, lecturers need to work together with educational developers and instructional designers in communities of practice as corporate agents (Archer 1996, 2013). The teaching and learning spaces of the future will be shaped by multiple stakeholders and role players collaborating in an increasingly open and democratic field of recontextualisation. In turn, this is dependent not only continued structural support, but upon fundamental shifts in individual mindsets as well as in institutional culture (especially at traditional research-focussed universities).

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