Annotated Bibliography

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Research Question

What are the critical competencies that enable online instructors to effectively facilitate an online course?

The general focus of this paper is on the critical competencies and skills required to be a successful instructor on an exclusively online environment. Tony Bates (2012) states that “students need opportunities to practice intellectual or conceptual skills such as problem-solving, communication skills, and collaborative learning. However, this won’t happen merely through the delivery of content. Instructors need to:

• think carefully about exactly what skills their students need,
• how this fits with the nature of the subject matter,
• the kind of activities that will allow students to develop and improve their intellectual skills, and
• how to give feedback and to assess those skills, within the time and resources available.”

This research paper will define the competencies required to be a well-rounded online instructor.

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This article further investigates earlier research statements made by experts on the eight critical roles an online instructor and how they are prioritized. It discusses how online instructors play multi-dimensional roles and looks into what is involved in training teachers to obtain such com-
petencies. The information presented in this research may be helpful to DE institutions and their training personnel, students, and instructional staff.


The author focuses his research on how instructional designers and educators play a significant role in supporting the self-regulated, student-centered, web-based learning environments. The questions the author looks to answer are how instructors should incorporate strategies for self-regulation using pedagogical tools for web-based learning. The author also researches how the outcomes of success are measured. This article proves helpful for students, researchers, instructors, and instructional designers.


This article provides perspective on incorporating online programs to early childhood education centers and, most importantly, how early childhood educators can be taught online and not lose them by not having the component of engagement that 1:1 interaction offers with young students. This article provides a different perspective in how to teach and retain instructors who will be teaching in an environment where personal 1:1 education will be necessary. For this authors research paper it helps provide insight to a new set of competencies needed by an educators once they are in the field.

Egan, T., & Akdere, M. (2005). Clarifying Distance Education Roles and
Competencies: Exploring Similarities and Differences Between Professional and Student-Practitioner Perspectives. American Journal of Distance Education, 19(2), 87-103. Retrieved September 11, 2014. The authors research the roles and competencies as ranked by 106 upper level graduate student-practitioners from eleven academic DE programs. Comparisons were made to two different studies previously conducted using information provided by DE expert respondents. The study includes twenty-one core competencies and fourteen DE roles that all agreed are a necessary component. This research proves useful for scholars, researchers, faculty, and students alike. Hong, S., & Jung, I. (2011). The distance learner competencies: A three-phased empirical approach. Educational Technology Research and Development, 59(1), 21-42. Retrieved September 16, 2014. This study describes the three-phase research approach used to identify a specific set of competencies needed by successful online learners. The study results provide great information for this authors current research to assist in identifying what competencies DE instructors must be aware DE learners need to be successful, this way they can be supportive of their requirements. The research also proves to be valuable information for DE institutions and staff, students, scholars, and researchers. Jiang, M., Parent, S., & Easmond, D. (2006). Effectiveness of Web-Based Learning Opportunities in a Competency-Based Program. International Journal On E-Learning, 5(3), 353-360. This study looked into adult DE learners and their progress in a competency-based online graduate program. The study breaks down its findings by type of online student and compared in-
structor-led courses versus independent study courses. The research showed that in order to succeed in a DE learning environment, students need scaffolding and modeling. This study may be used by students, DE institution faculty, and researchers.


This study focuses on instructional designers and how they can apply constructivism in their course designs. Constructivism is the dominant theory discussing active, passive, and collaborative learning and how it supports the knowledge obtained by learners. This article is particularly useful in this authors research topic and can be applied to instructor competencies and how constructivism plays a great part in building a successful course and program. It also is helpful for scholars, researchers, and students.

Smith, N. (2003). Characteristics of Successful Adult Distance Instructors for Adult Learners. Inquiry, 8(1).

The author of this article studies the relationship between the characteristics of older adult learners and the teaching success of distance educators. The author identifies different types of effective training for DE instructors to obtain the necessary competencies to teach in a non-traditional learning environment. This article offers great information to DE institutions and what they should consider to include as on-going trainings for their staff of instructors. The article identifies common mistakes made by new instructor, which for this authors paper can prove helpful in defining instructor competencies and roles.

This author argues for testing and competency traits which better fit today's instructor comparing those from the past between 1920-1980. The author presents the history of teacher competency tests. The author provides great information for DE institutions, DE instructors, students, and instructional designers.


This article describes a study that identifies the competencies and roles required in DE, rates the competencies, and compares them to the findings from five years prior. The research focuses on the roles of a leader, trainer, instructor, designer, and communication skills. This article is important to this author's research paper by providing information which is clear about the roles and competencies needed in DE higher education programs, especially leadership skills.