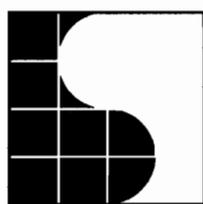


TEACHING INTRODUCTION TO SOCIOLOGY AS A HYBRID COURSE: A RESOURCE MANUAL

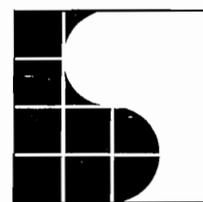
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Threshold Effects in Hybrid and Blended Online Classes

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Abstract

Hybrid, blended and WEB-enhanced courses, combining E-learning and face-to-face (F2F) environments, are increasingly popular with college instructors who want to combine advantages of online and F2F modalities. However an online activity, in an otherwise F2F course, may or may not “take off,” depending on if students embrace it. Based on case studies, the experiences of a number of instructors and micro sociological interaction theory, the authors suggest theoretical factors which affect student adoption of blended/hybrid online components and which may push the components over a theoretical threshold of participation. In blended and hybrid face-to-face online courses, students require time and effort to internalize the norms of the less familiar online environment. Whether students are willing to make the effort to cross the participation threshold depends on factors such as: the percentage of the course content taught online, the relative level of integration of the online components with the rest of the course, the timing of the introduction of online components into the course, and the psychological or emotional need for those components.

Introduction and Literature Review

The first wave of E-learning, fully web-based asynchronous college courses, has taken the world by storm, quickly grabbing a sizable portion of the college market, opening up college education to new demographic groups and dominating educational research conferences. Now a second wave of E-learning, blended-hybrid learning, combining online and face-to-face (F2F) activities, is creating a quiet revolution among instructors who want to combine the advantages of online and F2F.

Virtually all U.S. universities have online course management systems, such as Blackboard, WebCT, First Class, Angel etc., as an infrastructure for their fully web-based courses. Recently instructors are using online course management systems to add online components to their traditional F2F classes. As instructors add online components, their F2F classes are morphing into something slightly different.

These combined online face-to-face courses go by terms such as web-enhanced, blended and hybrid courses. However because these terms are relatively new there is no consensus on definitions. At a recent conference, Kaleta and Aycock (Kaleta & Aycock, 2004) defined web-enhanced as any course with 20% or less online with the remainder face-to-face. They defined hybrid as any course with more than 20%, but less than 80%, online. Because some online courses have a face-to-face orientation or summation meeting, Kaleta and Aycock classify anything over 80% online as fully online E-learning.

Other researchers use terms like “blended” and “hybrid” synonymously without a precise definition (Parkinson, Green, et al, 2003; Voos, 2003).

The current authors think that three distinct categories provide a more useful taxonomy. Therefore we suggest that these combined face-to-face and online classes can be classified into three broad types, *web-enhanced*, *blended*, and *hybrid learning*, defined by the percentage of web-based interaction.

A growing number of instructors put portions of their course online for convenience, saving strain on the department photocopier and avoiding lugging bundles of handouts to class. *Web-enhanced* courses add on a minimal number of web-based elements such as the syllabus and course announcements, into an otherwise entirely F2F course.

In *blended* courses, the instructor adds some significant online learning activities, which change the flavor of the class. A blended course might include online quizzes, real-time chat room or online asynchronous discussions, counting for about 10% of the course grade. In blended courses, these online activities represent the lesser part of the course. Either they do not replace any of the regular F2F class meetings or if they do replace F2F meetings, it is less than 40%. If the online activities replace F2F class meetings by more than 40%, but less than 80%, then the course is considered *hybrid*. Classes with 80% or more E-learning, a considered *fully online*.

Offering an online activity is no guarantee that students will embrace it. Some may consider online activities natural for students raised on computers and video-games. The online activities may be graded. But there is still no guarantee that students will participate. It is hard to predict why some blended and hybrid online components take off and some don't. The authors propose a theoretical blended-hybrid 'threshold' effect, derived from micro sociological theory and empirical studies (Smith & Kurthen, forthcoming), to help predict which online activities will be successful, which won't and why. This paper proposes some theoretical ideas with practical implications, which are suggested by some empirical results and anecdotal accounts. The ideas, such as a possible 'threshold' effect, are suggested as a framework for research and food for thought for instructors.

The Centrality of Norm Internalization

How students internalize the norms of an online class is a potentially major factor in online components of hybrid and blended courses. People make sense of their social world through a psychological process called "accounting," i.e., using brief verbal, "signs," to interpret their actions within a social context. Much of this is done through shorthand statements which assume a common knowledge based on previous shared social situations (filling in the meaning with the "et cetera principle," Garfinkel, 1967). Garfinkel's work and some of the ideas presented in this paper derive from symbolic interactionism (and microsociology) which focuses on micro-interactions at the individual level, i.e., "the interaction between a person's internal thoughts and emotions and his or her social behavior." (Mead, 1934 cited in: Wallace and Wolf, 1999, p. 191). Students (and virtually all people) develop a sense of group membership, a sense of "us versus them," by signs which have meaning only to those within the group. A fluent use of these signs creates a sense of bonding in the group. As a person tries to be accepted

into the group, s/he makes tentative attempts to make the signs and understand and correctly interact using these signs and gauges progress of acceptance by feedback from group members. This point is better understood if we compare the traditional classroom with E-learning interactions.

Students interpret a traditional classroom experience as "orderly" when the professor is teaching in front of the class and writing notes on the blackboard as he speaks. How the instructor says certain sentences emphasizes for the audience how s/he feels about a given subject as well as its importance. Unspoken meanings are transmitted not only by verbal but also by non-verbal cues.

However body language is not part of E-learning interaction. An online instructor cannot present an "orderly" classroom setting, standing in front of a class and writing things on the blackboard as s/he tries to convey to students the meaning of the lesson. Gone are personal presence and non-verbal communication. Signs of mutual understanding and meaning that are not explicitly verbal or written (Garfinkel, 1967) are limited. The understanding of vague references, the missing meanings and unspoken intentions of F2F conversations are lacking in E-learning interactions. Students of online classes have to decipher written instructions, announcements, examples, or assignments to understand what is expected of them and what is of importance. Online instructors remark that instructions need to be highly detailed and even redundant, since there is less immediate question and answer and less non-verbal communication to disambiguate instructions (Smith, Ferguson & Caris, 2002).

It is not clear whether the more constrained non-physical and indirect ("virtual") communication prevent students from a better understanding of requirements and learning in comparison with F2F classes. Parks (1996) suggests that there is no "missing meaning" in online interaction. Internet language also has group-adopted "signs" functionally identical with the common group jargon of F2F interactions used to solidify group membership (Parks, 1996). Internet communities also learn the unspoken norms of their community. Online students learn what language is appropriate to use for what purpose and at what time. They learn to understand expressions by the instructor that have an underlying moral, critical, or motivating tone. They also adopt expressions with commonly-held implied meaning to describe situations otherwise difficult to explain more literally.

If an instructor uses a very sloppy language, grammar, punctuation, etc. in his responses to the students and also lets pass sloppy online responses without reprimanding students, the latter will assume that it is ok and not grade-relevant to be 'informal' and you will see an increase of informality compared to other classes. On the other hand, if an instructor is very formal and official (for example as being addressed as 'professor' in emails and also formally addressing students) this will also be reflected in the overall rigidity of 'forum' and personal professor-student interaction. These issues become even trickier if an instructor claims informality or 'bad language' for himself, but hypocritically tries to enforce formality of students responses. That often leads to confusion, conflict, dissatisfaction and a decrease in learning.

In online classes, the instructor has to construct an effective framework to transmit knowledge and symbolic meaning, and to establish group norms, group codes, and bonds

in virtual reality (Lincoln and Guba 1985). Those who claim that online interaction is a medium devoid of emotions and human expression, ignore that people can, in the written format, communicate their feelings and "virtual" gestures via slang and with letters, digits, and graphical symbols, such as "shouting" via capital letters, exclamation or question marks, periods, "happy face" symbols, etc. (James and Jansen 1997). Online instructors also bond with students through the character, length, frequency, and type of responses. A key factor for establishing and maintaining online relationships is the amount of time and the degree of involvement participants invest in virtual interaction (Parks 1996). Since students in online classes do not have immediate real-time question and response to disambiguate assignments, how much and how quickly the instructor responds is a major factor in student satisfaction (Shea, Swan, Fredericksen & Pickett, 2001; Trippe, 2001).

Online communities also develop a shared sense of membership and mutual trust, perhaps compensating for the lack of non-verbal signals (hand shakes, looks into eyes, gestures and grimaces, sounds, body language, etc.). Chat room communities develop a shared use of language, stories and codes, providing common meaning and expectations about membership behavior. In fact, the written language used in emails, forums, instant messaging, or chat rooms can be more effective in creating community than the fleeting spoken word in F2F interactions (Putnam and Pacanowsky, p. 110).

For example, in one of the classes the authors studied, a student, who willingly provided advice in asynchronous discussions, became the "computer expert". After he answered an identical issue exhaustively several times over a period of about ten days, he reacted angrily when approached again with the same question. He pointed out that he voluntarily had given an answer previously and refused to do it again since there was an answer trail readily available from previous postings. Other students posted supporting comments. After this episode, the student expert continued to answer questions, but was never again approached with repetitive questions. It was considered rude to ignore his previous postings.

Students of blended and hybrid courses do see each other in the face-to-face portion of the course and may have internalized norms and developed some group codes F2F. However because of lack of familiarity with the environment and perceived isolation in E-learning, it may take longer and require more effort to internalize norms and develop codes in that environment. Students may not be willing to spend the extra time. Because of perceived isolation and unfamiliarity, adjusting to the norms in online learning in blended and hybrid courses may involve an urgency and anxiety greater than in traditional F2F courses. How do these issues of learning and internalizing norms relate to student adaptation of online components? It is helpful to examine some key cases of blended and hybrid courses to sift through potential causes and effects.

Pilot Study Method

The authors used a non-probability purposive sample of 5 blended and hybrid College courses to conduct a time-series pilot study investigating how students interacted in the online and F2F portions of these classes. Data were collected through content analysis of online postings and structured observations of F2F courses during 14-week semesters between 2000 and 2003. Construction of the research instruments was motivated by

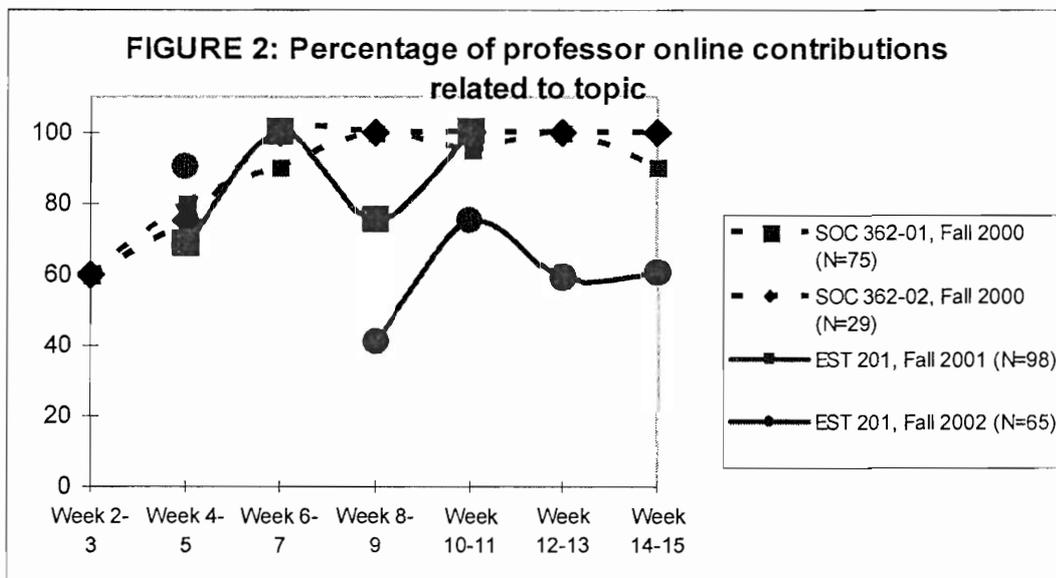
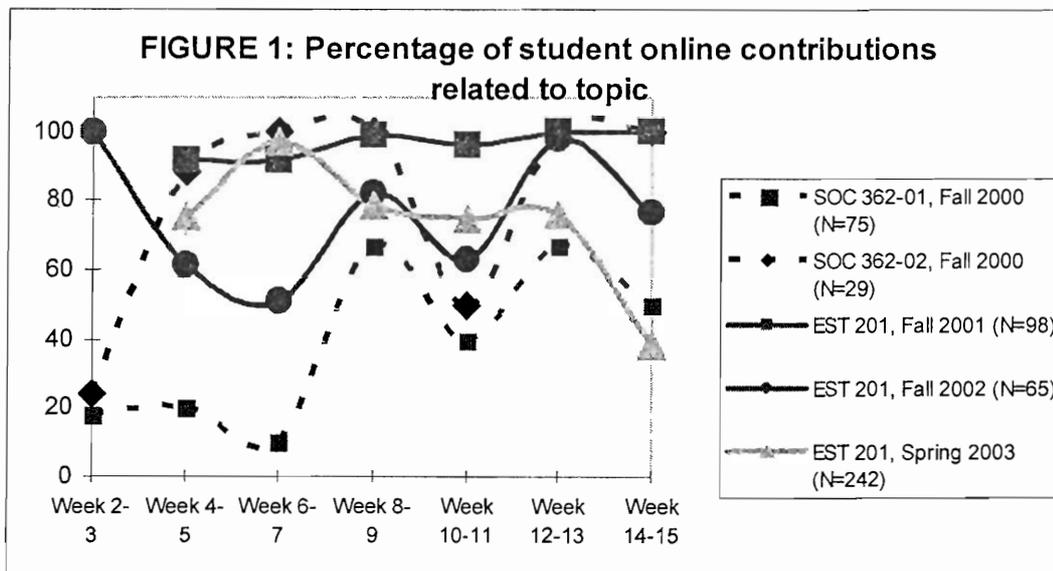
hypotheses based on micro sociological theories, such as “Initial student reluctance/resistance against E-learning will be resolved over time when students begin making sense of online routines.”

The courses involved in the study were:

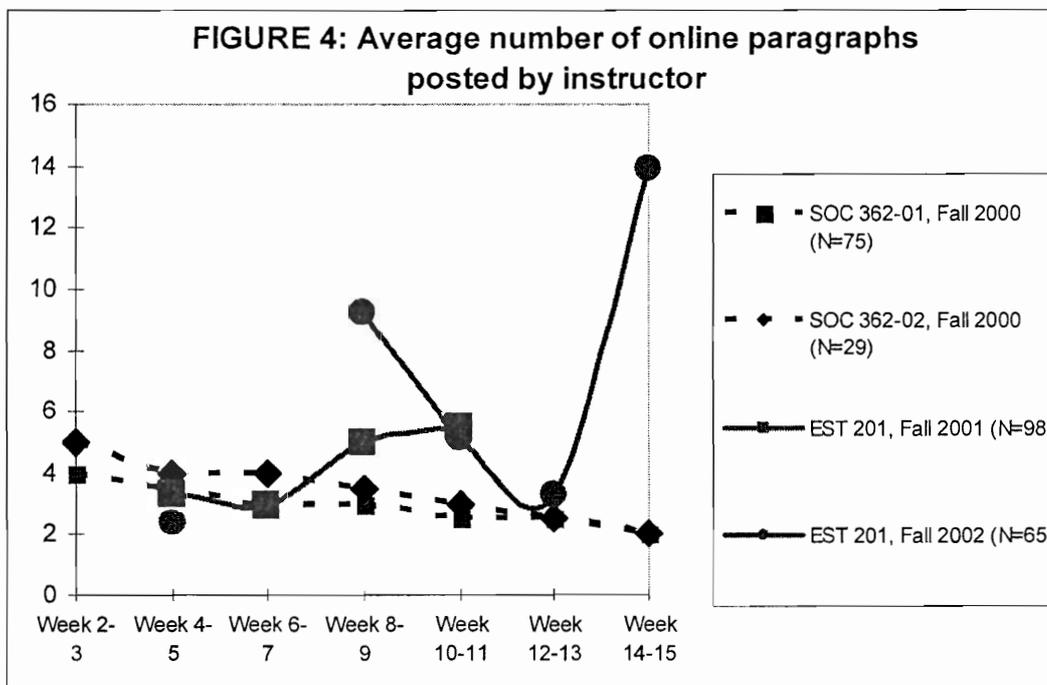
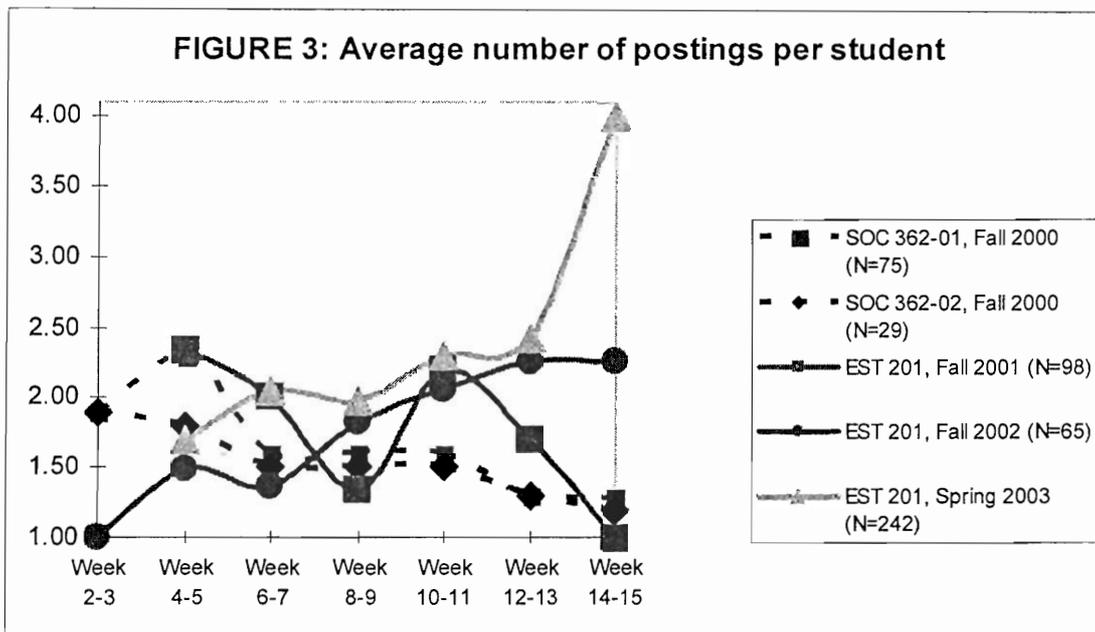
1. Hybrid: We observed and analysed two sections of a hybrid sociology course, SOC 362 (Sociology Theory), with 75 students in the first and 29 students in the second section. The hybrid class involved Chat room and Forum postings and some F2F class meetings. Online discussions and assignments represented a substantial percentage (about 70%) of the contact time in this class.
2. Blended: We analysed and observed a blended course over three semesters. This was a large survey course on societal effects of technology, EST 201 (Technological Trends in Society). E-learning accounted for about 40% of the grade in the Fall 2001 EST course (N=98 students), about 30% in the Fall 2002 EST course (N=65), and about 25% in the Spring 2003 EST class (N=242).
3. Content analysis: The investigators and trained undergraduate and graduate research assistants counted, classified, and analysed postings from the E-learning components of hybrid and blended learning classes. We looked at frequency and percentage of "on time" asynchronous postings and chat room postings per week or module, length of postings and their content, assignment complaints, etc.
4. Structured observations: To obtain some measure of interaction between students and instructors in the F2F components of hybrid and blended classes, undergraduate research assistants (working for credit) were trained and supplied with a one page observation sheet to conduct structured observations. Observations were entered into a database, recording information such as class interaction types between students and instructors, attendance, and other relevant information.

Pilot Study Results

The authors expected to find that student's initial reluctance to E-learning would resolve over time as students made sense out of the routines of online learning. We expected that as students internalized new rules of interaction through virtual online postings and learned a new code of expressing themselves through writing, they would ask fewer organizational, technology, or grading related questions. Instructors would intervene less often with positive or negative feedback. For blended and hybrid courses over the course of each semester, we expected a decrease in total number and relative frequency of student postings related to non-content related issues. Similarly we expected a relative increase in content-oriented postings by instructors although the total number of instructor postings would decline in absolute terms. These assumptions were confirmed for the two hybrid classes and the 40% online blended course, but not for the two blended courses with less than 30% E-learning content (see Figures 1 & 2).



In addition, the authors expected that students would post, after some adjustment time, fewer but analytically deeper and better online contributions as students developed "orderly patterns" of behaviour in the E-learning settings of blended and hybrid classes. Correspondingly, the total number of instructor postings would decline too. Again, this turned out to be true only for classes with more than 40% E-learning share. Here the student and instructor posting frequency declined over time, while the length and analytical depth of individual postings increased. Again, the most obvious difference to explain these outcomes was the fact that hybrid classes had a higher percentage of online components, replacing F2F meetings (see Figures 3 & 4).



For example, in section 01 of the hybrid course, students posted 139 postings in weeks 2-3, i.e., 2.28 postings per student. The number of postings declined in weeks 6-7 to 90 postings, i.e., 1.58 postings per student, and 75 in weeks 12-13, i.e., 1.34 postings per student (compared to a semester average of 1.64 postings per student). While the number of postings declined over time, the length and depth of the postings in the hybrid course increased. The average length of postings in weeks 2-3 was one paragraph per student. In

weeks 10-11, it was six paragraphs and the content was significantly better with stronger analytical thinking and in-depth probing of topics. In the blended classes with e-learning content below 30%, none of these trends were replicated.

Another indicator, the ratio of instructor postings to student postings, declined significantly in section 01 of the hybrid course over time from 53/139 (a ratio of 0.87) in weeks 2-3, to 40/90 (a ratio of 0.70) in weeks 6-7, to 18/75 (a ratio 0.32) in weeks 12-13 (compared to a semester ratio average of 0.62). Again, our findings from above were confirmed.

Learning in Mixed Environments and 'Threshold' Effects

The instructor of one of the blended courses mentioned that he had great difficulty getting students to participate in online discussions. Over the course of four semesters, he tried many different strategies to boost student participation in online discussions. Despite online discussions counting for one third of the course grade, students never fully participated in the online discussions. Apparently students' resistance to E-learning (a relatively new environment at the time – 2000 to 2003) was overcome in the hybrid, but not the blended course. From our empirical findings we derive the conclusion that there seems to be a '*threshold effect*' in E-learning. A critical mass of the course activities must be online to motivate students to successfully adapt, learn, and benefit from the E-learning components of blended/hybrid courses.

After experiencing above student reactions, the instructor changed the format of the online discussions to increase student "ownership," assigning a student moderator to read the journal article and generate a discussion question. The moderator coordinated the discussion, wrote a summary on why the discussion did or did not take off, discussed best postings, and evaluated the original discussion question. With this new format, all of the students participated. However it was still hard to get the students to read and evaluate the articles, and to participate at a high level supporting their arguments with evidence and critical thinking. The instructor's view was that having the students take ownership improved discussion somewhat. She was still dissatisfied with overall student participation and involvement.

We suggest that the 'threshold' effect, mentioned above, is a logical explanation for the relative failure of online components in this type of blended course. It would be interesting to replicate the format of the course in different versions with larger and smaller percentages of the course taught online and then assess learning, student satisfaction, and the acceptance rate of the online portions.

The choices of the instructor (or instructional designer) are not easy. Sometimes there are a number of different online tools and environments that seem vital. However, components and additional tools presented at the beginning of the course are more quickly accepted as part of the normative environment than those introduced later. In our experience, students perceived online components introduced later as non-essential "add-ons," even if graded. For a variety of personal and course-related reasons students tended to resist inclusion of additional tools and learning components later during the semester and perceived such a policy as disingenuous.

When it comes to incorporating diverse environments (online and F2F) in the same course, “how integral” and “how soon” are key questions for adoption and learning. However, an overriding psychological or emotional need for additional component can turn the issues “how soon” or “how integrated” into moot points. For example, a course coordinating a K12 teacher internship program met F2F once a month. During the intervening time the students did an on-site teacher internships. Halfway through the semester, the instructor added online discussions which really took off. The students working as interns had a powerful feeling of isolation, insecurity and real need for day-to-day emotional support as they took on the daunting task of student teaching. The monthly F2F meetings simply did not provide the needed day-to-day emotional support. Therefore the students embraced the online discussions (Saleh, 2004).

Factors that affect Blended and Hybrid Courses

In the above mentioned pilot case studies, the online components of the hybrid sociology courses took off, while those in the blended courses did not. This pattern was repeated in other hybrid and blended courses. We ascribe this dramatic difference in online student participation between the blended courses and the hybrid sociology class to at least three factors: 1. the *percentage* of online course components ('threshold' effect); 2; the *integration* of E-learning components with the overall structure and content of the course; and 3. the *psychological-emotional* function of the online components.

1. **Percentage effects:** In the blended EST course, the E-learning components represented 30% of the course grade, but did not actually replace any of the F2F lectures. So if students averaged half an hour a week in online discussion (a generous estimate), then E-learning represented 12.5% of course contact time. In the hybrid sociology course, the E-learning components actually replaced more than 70% of the F2F meetings (including quizzes and tests). We believe that the percentage of a course that is in an alternate environment (online in this case), is a major factor determining whether students embrace it. Students must overcome some resistance and internalize the norms and rules of another learning modality. Perhaps it is just not worth the effort if the additional modality represents only a small part of the course. If the novel component is intermittent, the students may actually have to habituate to the norms each time. Student resistance to a novel modality will be especially pronounced as they cling to familiar modalities, i.e., traditional F2F classes.
2. **Integration effects:** The blended EST course was a large enrolment survey class with lectures by the instructor, a number of guest lecturers, text-book readings, in-class assignments and online discussions. The main assessment was multiple choice tests. The culture of the class revolved around the F2F classroom meetings. When the instructor initially developed the course, he believed that online discussions might overcome the impersonal, passive qualities endemic to many large lecture courses, i.e., that adding online discussions would make it more personal and learner-directed. However, the students seemed to perceive the 120 minute F2F lecture as the fundamental social unit of the class. Online discussions which spanned two or three weeks had a very different sense of time than the rest of the

course which often focused on a 120 minute period. Because the content of the online discussions was only peripherally related to themes in the text and lectures, the online discussion did not “feel” integrated with the rest of the course. Also the grading structure was completely separate for the online discussions versus the F2F lectures. The online discussions were graded according to quality and quantity of discussion postings, whereas the lecture material was assessed by multiple choice exam. This may have contributed to a perceived lack of integration between online and F2F components.

Another important point is the timing of introducing a new environment. The timing seems to heavily affect whether students perceive the 'new' modality as integral or peripheral to the course. New teaching modes ('environments') introduced at the beginning of the course, when students are busy with internalizing norms and class codes, are more likely to be perceived as “integral.” Once that initial period of internalization is over, students may be loath to learn a new environment and internalize its associated social rules. Internalizing norms of new environments is tacitly the “business” of the beginning of the semester.

3. **Psychological-emotional effects:** The integration and the percentage 'threshold' effects can be compensated or even rendered moot, if there is an over-riding emotional or psychological need for an alternative modality. The course coordinating a K12 teacher internship program provides a powerful example. Meeting F2F once a month did not provide sufficient emotional support. But the addition of online discussions met a real psychological need.

A corollary of psychological-emotional function is the student perception of ownership. It is a basic human need to want to actively control one's life. The educational philosophy of constructivism has tapped into this desire to motivate students to customize their own learning experience and to build on their existing knowledge and experience. It should come as no surprise that a student sense of ownership, as illustrated by the blended multi-media class, can boost participation in an online component. However the need for active control is a general emotional need. The example of the course coordinating the internship program is a specific and unique context-dependent psychological-emotional need. Instructional designers should be on the lookout for such specific emotional needs unique to the particular course and attempt to use them to achieve their learning goals.

The cumulative weight of above mentioned effects, norm internalization, 'threshold' percentage of online course components, and psychological-emotional needs may explain why the learning efficacy of blended and hybrid courses is often significantly different. We hypothesize that these factors therefore are also central for the understanding why students embrace or not a course and its components.

Conclusion

Instructors adding online elements into their F2F classes should consider whether there is good reason to include them and whether those online components are likely to “take off.” The factors mentioned above (*percentage, integration, and psychological-emotional*

effects) are a good start starting point for estimating the probability that students will embrace an online component.

But before even entering the discussion of whether online components will “take-off,” instructors should ask if there is a good reason to include them in the first place. Adding online components because other instructors do it is not justified. Convenience may be a legitimate factor. By putting the syllabus, assignments and other handouts online, instructors save paper, class-time, and the problem of distribution material and its access. Furthermore, if changes are made to the syllabus or and assignments, students can immediately see those changes. For example, course management systems like *Blackboard* have the advantage of being able to reflect up-to-the-minute events like class cancellations or providing text related revisions, etc. The online posting of a few course documents requires students to download, but not interact socially with each other or with the instructor. Socialization effects are negligible. However before instructors include online components with social interaction, they should ask themselves whether the extra adjustment required of students is justified.

What are specific reasons why a particular class should be transformed from traditional F2F into blended or hybrid learning? Perhaps a discussion-oriented class might have an enrollment slightly too large to allow each student to fully participate. Online discussion can help extend the discussion so that all students can participate. Perhaps the character of a student population may suggest online activities. If the course requires out of class group projects and most of the students are commuters, then online group activities make a lot of sense. If the course involves a lot of remote fieldwork, then frequent face to face meetings may be awkward and E-learning components become vital. Some classes may benefit from informational resources that are most accessible in an online format. For example, in a course where students are required to conduct a research literature search, an online document describing how to write such a literature search can link them directly to research databases at the university library web page.

Finally if a decision is made to add online components, the instructor should consider the design factors that make it likely for the online components to “take off,” factors such as *percentage, integration and psychological-emotional need* which may help to put them over a *participation threshold*.

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