Research, Writing, and Creative Process in Open and Distance Education: Tales from the Field

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12. Writing in the Margins: Maintaining a Scholarly Voice as an Executive

Mark Nichols

Why Me?

It is with some trepidation that I write this chapter. After all, I'm an odd choice alongside my much more accomplished peers in this book! My career in open and distance learning spans some twenty years, yet I have only about thirty peer-reviewed publications, two books (one self-published) and, well, now *three* book chapters to my name. Though respectable, my research history is hardly prolific. There are a few keynotes and various presentations, but my work is not centre shelf. Nor is my name immediately recognizable from any journal's contents page.

Perhaps this might explain why: in 2010 I made a choice. I had two job offers open to me, two years into my PhD study. One was a fixed term academic and researching role with a top New Zealand university; the other, a permanent senior management role in New Zealand's largest dedicated open, distance, and flexible learning (ODFL) provider. I could become a researcher in my chosen field, or a decision-maker. I became a decision-maker. So, my research since 2010 has largely, though certainly not only, been in my own time and at my own instigation.

This has two implications for my work. First, seldom do I have any opportunity to take more than a few hours each month in work time to write. So, I literally write in the margins of my day. In fact, with no exaggeration, I am writing this very sentence ten minutes before my first Teams meeting early one Tuesday morning. Second, what I write needs

to either be immediately useful to me or else an account of what might be useful for others seeking to make the same decisions I am concerned with. There is a rich bank of scholarship for all practices in ODFL, which managers such as me get to explore from time to time in search of scholarly insight. This research naturally informs what I am doing, which sometimes extends to my writing about it later.

So, my roles in senior ODFL management have determined my research direction and volume. I chose to manage and lead rather than teach and research. This is not problematic for me. I publish because I practice, not lest I perish; I publish for pleasure, not for promotion. The choice to manage has brought a relevant and, I like to think, practical and grounded edge to my research. Being spread across so many research areas, from student retention to the development of learning designers, from guiding the ethics of analytics to institutional transformation, from advocating on-screen reading to explaining the advantages of online theological distance education, has been a privilege every time.

Why I Research and Write

Research and writing are often motivated by curiosity. Not always, though. My PhD started out of sheer annoyance, though annoyance eventually gave way to curiosity; I simply could not understand why the received wisdom as it related to my area of practice was so far off from what I suspected.

Curiosity is based on these sorts of questions: What do scholars think about this? What evidence is there, and how good is it? How could this idea or practice be improved? How might I help people better understand the possibilities here? What further things can I learn about this? My curiosity in others' ideas and discoveries usually lead me to reflect on my own perspectives and practice. If I think my explorations could reshape the narrative and help take it forward, I start writing.

My work on reading from the screen was driven by a curiosity, in response to a workplace decision. In 2015, Open Polytechnic moved to withdraw print for its materials in favour of on-screen only materials development (for the benefits of this, see Nichols, 2020). I have found over the years that curiosity is the best, enduring channel into a research project. Not only does it provide motivation; curiosity also leads me

into the literature. Before too long, what to research and write about becomes obvious.

Curiosity aside, my motivation in research and writing is threefold: for the sake of writing, to maintain relevance, and to ensure I maintain a professional profile or scholarly identity.

Writing, for me, is a journey of discovery. Entering a writing project is an opportunity to explore, to go on a long journey where I have a rough idea of the destination and look forward to the scenery en route. I begin with a sense of adventure, not of dread. I enjoy my time at the word processor. It wasn't always like this; what changed my relationship with writing was the joy of having articles accepted! Writing is no longer a test or a trial. Instead, it is a well-rehearsed path, an activity I anticipate. Writing improves both my self-expression and self-awareness. What's not to love about that?

However, the sheer volume of ODFL-related journals and forums is simply bewildering and keeping up with it requires more focus than I can typically give. Curiosity gives me an excuse to deep dive into an element of ODFL, and the ripples of that dive inevitably extend into broader ODFL themes. I learn a lot out of sheer serendipity, gaining incidental insight across all sorts of ODFL developments during a specific study. Good scholarship draws across the breadth of ODFL practice and thought. Reading literature in one specific area provides insight across others, too.

Scholarly profile is, I freely admit, important to me. Over the years, I have served as a journal reviewer, editor, and editorial board member. I have also served on the boards or executive committees of ASCILITE, EDEN, FLANZ, and the ICDE.[1] Writing and publishing is a natural and related activity for how I understand myself as an ODFL professional; I both draw from and contribute to the scholarship that drives my practice. Eventually, scholarship and professional networking bring their own opportunities. As an example, I met Dianne Conrad — editor of this book — because of the *Leaders and Legends of Online Learning* podcast. I had certainly encountered her work before, and have cited her several

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1   ASCILITE, Australasian Society for Computers in Learning in Tertiary Education; EDEN, European Distance and e-Learning Network; FLANZ, Flexible Learning Association of New Zealand; ICDE, International Council for Open and Distance Education.

times, but I had not established a connection with her. Much of my more recent work has resulted from professional connection.

Research and writing are interconnected. Writing is like scholarly catharsis, getting things not off your chest, but rather out of your mind. Of course, seldom is an article or book chapter accepted on first submission. I have learned to respect and even enjoy peer-reviews of scholarly work; invariably I am challenged to improve my efforts, and as a bonus I gain advice as to my ongoing development as a scholar. Research is the activity by which I engage purposefully with literature, listen to the voices of others, consider evidence and perspective, and explore others' thinking as I further develop my own thinking. If I see opportunity, I also seek to contribute my own thoughts through publication.

The Process of Writing

One of the fantastic things about our digital age is that it is so easy to record, edit, and reorganise thoughts. Sourcing, citing, and playing with information has also never been easier. The simplicity of selecting, copying, pasting, and deleting text gives me confidence to think onto the page, with all its haphazardness and random insight. Capturing thoughts, be they raw, half-baked, or well-done, results in a spread-out pile of insight resembling builders' waste intermixed with dressed timber. Some of these thoughts might just be a few words; sometimes there will be complete sentences. Rarely will there be complete paragraphs. The variety is OK; from time to time, I will sort through these bits and pieces in case I see something in there that I can dust off and repaint, remodel, or otherwise bring into the final product. The digital skip bin can never be full, and it is easily sorted.

So, when it comes time to begin an article or research project, I begin by simply writing. Beginning in this way was the best PhD advice I received (a close second was learning how to paragraph). Getting on with the writing helps me to get a sense of context, to order my thoughts, to define my position. This has several benefits, including helping me to discover the gaps I have in my thinking. When I write I'm forced to bring order to my thoughts, and I often discover I have no way of bridging some of the ideas I have. Some of those things I think are connected do

not *write* as if they are. Writing requires me to be more disciplined in my understanding, more logical in my associations.

So, my initial writing is very much a chaotic exercise of self-discovery. I have learned to anticipate this and not become discouraged by it. Developing a position in this way is an extremely useful starting point. My better-honed understanding helps me to better engage with the literature, and I begin to get a clearer sense of the research questions I have. I do not expect to start by writing final copy.

I tend to begin with a basic document structure that matches my sense of where an article might go. Section headings and key themes, as they occur to me at the start of the journey, are inserted in a Word document using heading styles. My free-flowing thought is captured within these headings, which might subtly change or else be radically reworked during the process. I tend do this before seriously engaging with a single article or book chapter, drawing solely on my previous knowledge and hunches. Section headings serve as buckets for ideas, themes for observations. I return to this draft document throughout my reading, until I feel confident enough to pause with the literature and start composing a first full draft. Then, it is back to the literature. The dance across full draft to literature swings with my mental rhythm, the draft changing shape as the literature and the new ideas it raises dictates.

The discipline of the literature review is foundational to gaining a valid voice. With no anchoring in literature, you have no secure way of connecting yourself to the conversation already underway. Think of publishing as inviting yourself, then being accepted, into a free-flowing conversation between a group of experts on a subject of interest to you. The conversation is already taking place. To contribute meaningfully, you need to be familiar with the ideas already shared across the group, the terms they are using, the points of reference that everyone shares. You also need to know whether the contribution you are planning to make has already been made, and how your contribution fits across agreed points of agreement and disagreement. All this activity helps you to find your place and identify your points of difference and nuance to help nudge the conversation forward. The conversation does not start with you, and it must be respectfully joined.

I prefer the metaphor of "dancing with" to "engaging with" literature. Writing drafts as part of the journey through literature is dancing with it. End-to-end reading with notetaking is engaging with it. Treat literature as a conversation partner, not a library. Engaging with scholarly literature is a slog; dancing with it is a release. The literature is the partner of ideas, challenging preconceptions and reinforcing what others have found to be of merit. The literature review is the playground of the synthesis, and the launch-pad of the primary study. Taking time to consolidate ideas through writing and note-taking through reading as intermingled steps is far better than trying to do these one after the other. A dance is dynamic; engaging is linear.

But enough of the preliminary comments in free prose. I have developed a bit of a groove in terms of how I approach a project, and I have learned quite a bit about myself in the process. Researching and writing are the two areas you are interested in as a reader of this book, so let me tell you about them in a much cleaner form: numbered lists. And, because I have taken my sweet time in drafting, writing, and re-writing this chapter, and because I have a penchant for equilibrium, I have found a way to balance two satisfying lists of ten points each. There is an explicit message in this balance, in that both are equivalent in terms of importance for maintaining a scholarly voice.

Researching

My ten points here span across three themes: subject, literature, and method.

Subject

1. **State your subject**. Your subject is the on ramp to the scholarly conversation, and without a subject, you have nothing to reign over. My research is typically motivated by that general discomfort emerging from curiosity or else by a practice need, but neither of these is a subject. Clear subjects are elusive; draft, draft, draft, and read, read, read, and eventually the subject will find you. While this step is listed first, it often takes on its final form only after steps five or six. Once I have my subject, it heads the study in my drafts from there on.

2. **Be intrinsically driven**. Starting a research project is committing to a scholarly relationship. You have got to be able to maintain interest in the subject the whole time of the study, prepared to learn from it, dwell on it, reflect on it, and spend many hours with its idiosyncrasies. Some projects are moody. Unless you are genuinely curious about it or else have some tangible connection with it, research and writing will not be fun. If a project dries up, put it aside and move on to something fresh.

3. **Interrogate your practice**. Often what inspires scholars is not necessarily what assists practitioners. Some of my more interesting work (at least for me!) began with problems my team and I were facing in our daily activity. In fact, my next two projects following this one are directly driven by practice needs: one to learn more about an approach we are applying to seek its improvement and validation, the other to explore an innovative means of doing something entirely new (and overlooked for way too long). The best projects I have worked on are those that are of interest to my immediate colleagues and relevant to my immediate challenges.

Literature

4. **Compile the resources**. There is always the risk of gathering too much or too little. My approach is the more, the better. It is easy to cull, so I cast a wide net. With research databases and tools such as Mendeley, it is no problem drawing in a vast array of work. Yes, there are various "core" journals in ODFL, but there are also multiple associated journals and publications where surprises are found. I always use Mendeley (or Zotero) to compile resources because it is too easy to lose track of everything! As with stating your subject, this is an open-ended step; as you read, you will discover more articles to add.

5. **Scan before reading**. A shortcut to reading literature is a triage, based firstly on the abstract and conclusion. I tend to make "yes/no" decisions for a full reading on this basis. Abstracts are used to determine whether an article is a priority, or even

whether it is worth reading at all. My advice: make a list of the first five articles to read and plunge in, knowing that you'll be in the rough seas for a while. Working in batches of five motivates me and takes me back into drafting with fresh ideas. I also tend to take special note from the literature reviews in those articles I decide to read. Well-written literature reviews feature prominent work and provide structure to others' ideas, and so provide navigation pointers to assist you in charting your own passage.

6.   **Start by reading the authoritative, contemporary articles**. These are often those written by renowned names in the discipline (I'm assuming that these make it through your triage in step five!) Start with these sources because they will provide the best landmarks, so to speak. Any article referenced frequently also gets boosted in my reading order, which I regularly tinker with. I tend to highlight articles in Mendeley as I go, focusing on key ideas, authors, quotes, and summary points. Full text PDFs in Mendeley are easily marked up, and sub-folders can be used to sort those works you have read from those you'll read next.

Method

7.   **Establish a baseline knowledge**. I was very fortunate early in my research career to be asked to prepare a series of scholarly literature reviews on subjects related to e-learning. Naturally, this required me to write about the core ideas and published studies of the early 2000s. This was invaluable to me. I found my voice, discovered the important journals, and learned which authors and theories were significant. Knowing what the subject was about, and synthesising it for others, brought a wonderful grounding and frame of reference for my subsequent work. Formal study (I did a Master of Arts in Open and Distance Education) also plugs you in to the grid.

8.   **Maintain a broad baseline knowledge**. With the avalanche of ideas now available across multiple subjects within ODFL, it is entirely impossible to keep up with the intricate breadth

of progress across all areas of practice. Fortunately, there is a series of articles and books written in collaboration with Olaf Zawacki-Richter (see, for example, Zawacki-Richter and Naidu, 2016; Bond, Zawacki-Richter and Nichols, 2018; Bozkurt and Zawacki-Richter, 2021) that provide meta-analysis across key journals. I have also benefited from the annual National Institute of Distance Learning (NIDL) "Top Ten."[2] Professional bodies including the ICDE, EDEN, ASCILITE and ODLAA[3] are great for highlighting key conversations and events. Finally, subscribing to journal tables-of-contents also provides a quick way of seeing the latest articles.

9. **Know (and respect) the process**. As with finding a subject, this ought to be obvious, yet from time to time I still rush into data gathering before settling on a method. This is always to my shame, punished usually by my having to rework (I once had an article returned three times by a reviewer who thought my method section was too light; but see point ten in the next section). In preparing this chapter, I was reminded of a conference paper I wrote early in my publishing career, included as an appendix. Along with step seven above, establish a baseline knowledge, I think writing that paper was an important beginning to subsequent research papers. For my PhD, I was also required to take methodology more seriously. Reference books about the research process, and time spent in them, are well worth the investment.

10. **Consider a baseline methodology**. There are various research methodologies that might form the basis of your work. Find one that suits your situation and get to know it well. Invariably research will involve some form of literature engagement, so preparing literature reviews is a vital skill. Pan's (2008) *Preparing literature reviews* has pride of place on my bookshelf, alongside the obligatory works by Creswell (2014), Dey (1993), Merriam and Tisdell (2016), Miles and Huberman (1994),

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2   For example, Good Reads from 2021: https://nidl.blog/2022/01/10/good-reads-from-2021-our-nidl-top-10-journal-articles-part-3/.

3   ODLAA, Open and Distance Learning Association of Australia.

and Punch and Oancea (2014). My PhD was mixed mode, so I learned how to perform inferential statistical analysis; the sort of research I get to do in the margins, though, tends more toward case study (Yin, 2018), synthesis, and primary work based on interview. Tempting though they are, I avoid simple surveys because they typically yield shallow findings that are not easily transferable.

Writing

Writing is the oft taken for granted partner in research activity. Here are ten points, again across three themes: organising, drafting, and writing for publication.

Organizing

1. **A little at a time is fine**. Discipline is what makes a scholar. I earlier mentioned having scholarly relationship with your project, and key to any relationship is spending time together. A scholar-subject relationship does not necessarily benefit from binge time. The best schedule is one that works for you, say, on a weekly basis, two, two-hour sessions late at night and a three-hour block in the weekend. Not bingeing gives you time to reflect. When you write in the margins, this sort of approach is a necessity; I think it is also a virtue.

2. **Take writing seriously**. Ideas do not sell themselves. If you cannot write, you cannot publish — and you cannot achieve a scholarly voice. Period. Writing is where I have learned the most over the last twenty years. I'm not a fabulous writer but I have worked hard to earn the style I have, and I know how much worse it could be! As a journal editor and reviewer, I have seen countless submissions where the main flaw has simply been how poorly the ideas were expressed. There is a burden of pain involved here: either you wrestle with your writing, or the reader must wrestle with what you have written. Someone must always suffer; make it you, as the writer. Learn as much

as you can about your writing and how to write better. Learn to write like an editor.

3. **Digitize deeply**. Making the most of digital tools is obvious but learning to use them effectively and build them into a workflow takes time. I have used both Zotero and Mendeley across my career and now use one over the other solely because only one is permitted on my work PC. I have ProWritingAid installed on my home PC. I purchase important reference works on Kindle. Portability, searching and highlighting — not to mention more accurate and ready referencing — are real advantages to digital research, as is having an automated writing coach critiquing your every sentence. No article is ever printed in my workflow, and I only tried physical 4 x 6 cards once before retreating (advancing?) into digital. It is not just software, though. My desk setup makes use of two external monitors: one landscape, my main monitor where Word resides showing three pages side-by-side; the other, to my right, a portrait (yes, try it!) monitor more for reference and PDF reading/annotation.

4. **Collaborate with caution**. I have been involved with multiple collaborative projects, and I have learned to approach them hesitantly. Unless you're working with people whose work ethic, process, and output are familiar to you, take care! Working with some will divide the work constructively; working with those who aren't confident writers or reliable contributors will destructively multiply the work. If you find a good partnership, though, stick with it.

Drafting

5. **Always take notes**. From the outset, just start writing, beginning with your sense of curiosity (or discontent) and where you think your work will take you. Draft some headings in a crude initial draft. Write a mix of what you know, and what you sense. At the very beginning of a project (including this one) I begin a OneNote page in my "Professional" section, open a Word document, and name a new Mendeley folder. Each of these are

like baskets ready to be filled with ideas, drafts, and articles. My OneNote page tells me about the project, Word contains my progress, and Mendeley stores references and direct notes. My multiple monitor makeup hastens attention across these baskets. Hardly any of the initial sentences or thoughts I draft initially will appear in the final published piece, and that's fine. Words store ideas well in advance of having to present them. Drafting full sentences and paragraphs in a rough draft helps me to structure my thinking.

assume that all people educate in the same way regardless of subject or university. The literature is the birthplace of ideas, presenting challenges to preconceptions and reinforcing what others have found to be of merit. A literature review is the playground of the synthesis, and the launch-pad of the primary study.

Researching and writing

Two headings? New structure for the points below? Revisit following first draft.

Mentoring myself

I've been research active in the field of ODFL for a little over 20 years. In that time, I've developed a bit of a grove in terms of how I approach a project, and I've learned quite a bit about myself in the process. Here's a bit of what occurred to me in drafting this chapter that I would have benefited from early in my publishing activity. Here, if you like, is my 'top ten' placed in the order in which they

Fig. 1. Screenshot signalling structure revision

6. **Continuously revise your structure**. The process of drafting and redrafting should not be underestimated. Expect *it* and *the time* that it takes to do it. As Kidder and Todd observe, "Most problems in writing are structural, even on the scale of the page. Something isn't flowing properly. The logic or dramatic logic is off" (2013, p. 170). I expect to write and rewrite multiple times to ensure good flow. I found myself doing this at a critical juncture in my drafting process for this very chapter. In Figure 1, you'll see a note I made myself during the first draft to revise structure; you'll identify some of the final text — and note the typo. Figure 2 shows the initial heading structure I used.
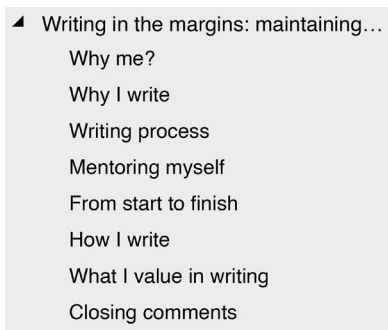
▲ Writing in the margins: maintaining…

    Why me?

    Why I write

    Writing process

    Mentoring myself

    From start to finish

    How I write

    What I value in writing

    Closing comments

Fig. 2. Screenshot showing initial chapter structure

7. **It is draft right up to acceptance**. This was a late lesson for me, but it is made such a positive difference: treat everything up to galley proofs entirely as drafts. I think in fifty shades of draft, starting with the aforementioned builders' waste. Every one of my publications has undergone extensive re-writing. At one stage, I thought it was because I hadn't learned how to write effectively, but now I know it is just part of the process. Research and writing are, after all, work. The willingness to write and rewrite takes both tenacity and humility.

Writing for Publication

8. **It is never the last word**. Do not kid yourself; chances are your article will not make the incredible splash it did for you as you wrote it. Keep a sense of proportion. Expect to see scholarship move on, and for your work to perhaps raise an eyebrow or two rather than earn a standing ovation. The best you can hope for is others seeing the merit of your ideas as your work assists them in their own endeavours. Raising the tide of scholarly insight by even a drop is a contribution, as you have added to public discourse for others to draw from. I have spoken with various successful scholars who express surprise that their most-cited work is one they considered incidental! Being published is its own recognition and reward, and it is an indicator you have made a positive difference.

9. **Write for the reader — and the editor — and don't forget the reviewer**. Ultimately, you're not writing for yourself. You may get pleasure out of writing (it is something I genuinely enjoy), but you're not the centre of your piece. One of the most important ways of checking whether you have met this goal is to purposefully read your work aloud before submission. Awkward sentences suddenly come out of hiding; gaps in the narrative are suddenly revealed as incomprehensible chasms. Another important activity here is a paragraph check, whereby you note in the margin what each paragraph is saying in a few words. This is an excellent check for structural logic.

10. **Learn from the reviewers**. I'm certain every published researcher has experienced the dichotomous results of double-blind peer review: to one reviewer the work is the best thing since sliced bread, with insight that everyone's been waiting for; to the other, it is a tangled mess that adds nothing new (ironically both could be right, depending on who is reviewing it). Reviewers are not the enemy, but they are the stewards. Journals tend to be picky in who they accept as reviewers, so their views are — as it says on the tin — from academic peers, who often have different subjective views. All have the same commitment to quality scholarship. I have learned a lot from reviewers and now understand their feedback as investments in my work. If they don't understand my main points, then clearly, I haven't successfully written for them (#7 and #9 above). Believe me when I say that reviewers have your best outcomes at heart. They are the best free tutors you will ever have!

The Leisure of the Margins

I have gone for a familiar and somewhat relaxed writing style in this chapter, and I have drawn on various metaphors on the themes of activity and travelling. All of this is intentional, because ultimately research and writing are familiar and inter-related, requiring energy and journey. I love travel when I get to it. I love the new sights, the discoveries, taking

photos, browsing local shops, relaxed dining, soaking in the culture, enjoying the noise. Oddly, my research and writing activity feels similar.

I'm not one for packaged tours. I have learned to not follow a strict, linear pathway. I tend to wander. If I sightsee by list, I get worried about the time spent at each destination. Sometimes a good article or thought gets me straying into another area, where I wander for a while. Perhaps this is yet another benefit of publishing for pleasure; there is no pressure to be slavish. I have learned to enjoy the journey, and plan for meandering. But perhaps that's because I research for the sheer pleasure of it, relishing the learning, reflection, and engagement it brings.

Being on the margins needn't make you marginal.

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Appendix: Early insight

As I reflected on this chapter, I was reminded of a conference paper I wrote almost twenty years ago as a young senior lecturer — back in the day when paper proceedings were still in vogue — for a professional body too small to consider digitizing its archives. It is a paper 3,500 words in length called *"Building a secondary research paper or literature review."* I have included a slightly adapted summary of its main points below. The paper suggests that preparing a literature review is like building a house, drawing on principles of building to describe the activity of secondary research:

Building insight	Principle	Description
1. Make sure you're a builder	The principle of Apprenticeship	Have a sense of professionalism and the basic skill set. Work with someone more experienced if you are getting started.
2. Start with an architect's plan	The principle of Setting Objectives	Set an aim, write a reason, list the issues you will explore. Have a sense of what your endpoint is: an article? Conference paper? Blog post?
3. Gather the building materials	The principle of Exhaustive Quantity	Get into the literature. Search the databases, follow the leads, draw from the best sources, organise what you find. Don't fear volume.
4. Don't blame your tools...	The principle of Research Technique	Start with abstracts and summaries. Sort your articles into themes and prioritise those sources that are clearly more important.
5. Build a firm foundation #1	The principle of Topic Immersion	There's no better word for it — immerse yourself in the flow of thinking. Start with the prioritised, follow your best sense from there. Take notes.

6. Build a firm foundation #2	The principle of Diminishing Returns	As you read, you'll find that reading more does not mean knowing more. Stop when the ratio of new ideas to new articles fades.
7. Build the framing	The principle of Structure	Draft section headings for your review. These should emerge naturally from all you have read and reflected on since your project began.
8. It needs a roof	The principle of Idea Integration	Start a fresh document, built on the frame above. This should cover everything you have learned and give final shape to the subject.
9. Don't forget to decorate	The principle of Critical Feedback and Editing	Decorating requires multiple coats of paint and makes a mess. Several drafts will likely be needed before you're done.
10. Market value	The principle of Dissemination	Meet the market, which is to say, discover and comply with the submission. requirements of your chosen channel or audience.
11. On the imperfection of analogies	The principle of Perspective	Expect that your understanding will change as you learn more. This is the treasure of the research endeavour.

You can see echoes of these insights across this chapter, and I'm happy to report that the advice I gave twenty years ago has proven itself since. Mind, what once took eleven points now takes twenty. I put that down to better Perspective (point eleven).