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Distance Learning, an official publication of the United States Distance Learning Association (USDLA), is sponsored by the USDLA, by the Fischler School of Education and Human Services at Nova Southeastern University, and by Information Age Publishing. Distance Learning is published six times a year for leaders, practitioners, and decision makers in the fields of distance learning, e-learning, telecommunications, and related areas. It is a professional magazine with information for those who provide instruction to all types of learners, of all ages, using telecommunications technologies of all types. Articles are written by practitioners for practitioners with the intent of providing usable information and ideas for readers. Articles are accepted from authors with interesting and important information about the effective practice of distance teaching and learning.

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A Sense of Place
The Role of Residency in Distance Education

Michael Beaudoin and Jaime Hylton

Many distance education (DE) programs tout the fact that they do not require any campus residency for students' satisfactory completion of a degree. Others, however, do require at least a brief campus-based experience, while some institutions offer one or more residency sessions that are optional. Some matriculants who need not spend time on campus as part of their degree requirements still choose to do so. Why? Do the benefits of such participation match their expectations? What do they feel they might be missing if they did not attend? Is the value added more in the affective or cognitive domain? Could they have gotten just as much from participating in an alternative activity? Would they choose to attend now that they know what it is like? Does participation in a residency session make the DE program seem more "real"?

Are there, perhaps, issues here that go beyond any educational content to explain why independent learners studying at a distance would actively seek opportunities to engage in congregate face-to-face study? Putnam's (2000) revealing work may offer some insight in this regard. He noted that, despite what seems to be a growing trend in the direction of impersonal lifestyles among Americans, there is, nonetheless, a strong and pervasive need for what he describes as "connections, reciprocity, trust, networking, mutual benefit, bonding, bridging and engagement." He further commented, "When people interact with one another, they have a model and foundation upon which to base further cooperative enterprises" (p. 346). Certainly, this convocation of peers would appeal to teachers who frequently characterize their profession as being a lonely one and, thus, could well be a motivating force in prompting interest in a congregate experience.

The questions posed earlier were addressed via a research study designed to examine what motivates students enrolled in a DE master's degree program to attend an optional 1-week summer residency session that involves leaving home, living in a dormitory, attending classes and seminars for 5 days—all at added expense—rather than completing an alternative three-credit independent study project while remaining at home. The questionnaire and study were not intended in any way as a means of

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gathering specific evaluative data on the quality of the residency experience.

The subjects were attendees at the University of New England Master of Science in Education (MSEd) program's 1-week, on-campus residency session in Maine during the summer of 2003. These students were sent a 15-question survey instrument via the post (with a self-addressed stamped return envelope) approximately 3 weeks following their attendance and asked to return it within 10 days. A content analysis of the responses was conducted by the co-principal investigators, who here present highlights of this research with the intent of providing useful data and insights to planners, administrators, and instructors in DE programs regarding the perceptions of participants who have completed an optional campus-based residency experience. Our intention is to offer insights regarding the value of face-to-face sessions for distant learners.

A period of residency as an integral aspect of the overall college experience has undergone an interesting transition in recent decades with the advent of DE as an increasingly prevalent means for students to pursue degree studies. Historically, living in communal housing on a campus has been considered an essential and normative activity in order to have a complete "college experience." Indeed, it has long been thought that one clear benefit of residential colleges is that "education goes on all the time." Now, in many quarters, it has gone from being compulsory to optional to superfluous. Whereas residency once provided a sense of place for students away from home, many now prefer to learn "anytime-anyplace," especially when that place can be their own home.

In the late 1800s, with the land-grant movement and extension studies, nonresidential study became an acceptable alternative in some situations, though extra-mural studies remained a limited option for some time. However, increasing geographic and institutional mobility pushed some universities to provide more flexible study options. More units within existing institutions established means for alternative delivery of courses. The British Open University has operated since its inception with a center-satellite model, whereby DE courses and services emanate from a central coordinating point and are augmented by regularly scheduled congregate study sessions in various locations throughout the country. Many other institutions subsequently adopted a similar model (e.g., Antioch University, Nova University).

By the 1970s, the expansion of DE courses emanating from campus-based institutions, as well as the emergence of entirely new DE institutions (e.g., Athabasca University), prompted a rethinking of residency requirements (Matheos, 2002) and raised a set of fundamental questions not previously considered. Is DE equivalent to classroom courses? Must all or some portion of degree studies be completed on campus? Does the notion of residency require a new definition in the context of DE? Traditional institutions still define the gold standard of study as courses and programs that provide inquiry-based and interactive learning experiences for individual students and groups of students and that promote a collaborative-constructivist approach to learning via ongoing communication with peers and faculty, so knowledge can be shared and understandings tested. Does distance teaching and studying ensure that these phenomena occur as effectively as in face-to-face settings?

There are at least two historical versions of residency to distinguish for purposes of this discussion. One is defined as courses that are taken face-to-face at an institution, the other as courses taken that are offered by an institution. This subtle but significant distinction suggests that residency might be satisfied by either physical presence at an institution or simple enrollment at an institution. In the latter case, the residency requirement is satisfied not on the basis of where study occurs but, rather, which institution sponsors it. Thus, the mode of delivery is less important than who delivers it. Gradually, some institutions adopted a policy regarding residency whereby the student must take a minimum of 50% of his or her courses from those institutions, but not necessarily by being on-site at their campuses. Consortia arrangements among institutions expanded the options for many students wishing to comingle courses from different institutions and via different delivery systems, but it also added greater complexity to the residency issue.

For the purposes of this discussion, the authors add a third definition of residency. A program of study that delivers instruction primarily across time and space, either electronically or via other means, but also includes one or more face-to-face interactions among faculty and students is incorporating a residency component into the overall learning experience.

The yield from a literature search on the topic of residency within DE settings confirmed the authors' suspicion that relatively little attention has been given to this area. In his report on factors influencing satisfaction and completion of correspondence study, Tallman (1994) concluded that it is possible in DE to develop an educational environment that will contribute to student satisfaction and that high quality

support services—including a mandatory orientation seminar—are key. Additionally, certainly, considerable research and writing is evident that presents comparative studies of face-to-face versus DE in terms of efficacy, student satisfaction, quality of materials, and the like. However, it seems that examining the presence or the purpose of residency experiences for distance learners has, to date, generated little interest among DE scholars and practitioners. This seems somewhat predictable yet also surprising: predictable because many planning DE programs believe they must eschew anything resembling campus-based requirements in order that their initiative be seen as a bona fide DE program; however, others launching similar efforts have no doubt about the value and need for residency sessions, especially to give the program greater "legitimacy." Those doing research and writing in the area of DE are more inclined to identify and address topics that are more exclusively associated with DE, rather than devote any time or energy to looking at such issues as campus residency. Thus, despite a large corpus of information now available on diverse topics relating to DE, this particular topic remains a lacuna.

Quite likely, there is another reason why this aspect of DE is largely ignored. Most probably, there is a perception that very few institutions establishing DE programs require any on-campus attendance. Thus, is there any significance to research findings that examine residency within the context of distance learning if relatively few institutions include on-campus components of any sort? In fact, a surprisingly high number of DE programs do have an on-campus requirement. A content analysis of *The Electronic University: A Guide to Distance Learning Programs* (National University Continuing Education Association, 1993), which provides a detailed listing of degree programs offered electronically in the United States, includes requirements of 94 institutions. Of these, 43 (46%) have an on-campus component. These activities range from a weekend orientation, to exams administered on-site, to 3-week summer sessions, to one-semester in residence. It may be that, in more recent years, fewer programs require a residency to satisfy degree requirements, but the fact that nearly 50% of those identifying themselves as DE programs 11 years ago consider an on-campus experience to be important suggests that it is a prevalent enough phenomenon that those of us involved in the delivery of online instruction will benefit from a better understanding of participants' perceptions of the role and purpose of residency.

In 1994, the University of New England (UNE) in Maine established that institution's first distance learning program, a master's degree for practicing teachers seeking continuing professional study and credentialing. Initially offered only in New England, matriculants completed 30 of the 33 required credits via independent study, utilizing a hybrid delivery system consisting of texts, videotapes, printed study guides, written assignments, and communication with faculty mentors on the home campus via phone, fax, and e-mail. Study groups of two to three students were encouraged and have proven to be an effective mode for interaction and reinforcement among peers. In addition, all degree candidates were required to attend an intensive 1-week summer residency on the UNE campus. This last feature was intended initially to counter the usual skepticism regarding the legitimacy and quality of DE offerings. The program's planner also believed that a short-term residency experience would allow teachers to collaborate and discuss issues of common professional interest in ways that were not possible through independent study. When the enrollment was still relatively modest and participants came mostly from the northeastern states, the mandatory residency was not viewed as an onerous requirement to fulfill.

Gradually, however, numbers grew and enrollments came from more distant states. This, coupled with increased competition for dormitory space on a relatively small campus, prompted the program's administration to make the residency session optional, beginning in 2002. In lieu of attendance, students could earn three credits by proposing and presenting an independent study project, subject to approval from the program director. This change did not reflect any philosophical or pedagogical shift in the program; it was done simply for pragmatic reasons to address scalability issues.

It was assumed that this change would result in a quite sudden and dramatic reduction in the number of students choosing to attend the summer session. After all, it did involve leaving one's home and family for a week, living in a shared and relatively spartan dormitory room, paying for (in addition to tuition) room and board and travel expenses, as well as anticipating and adjusting to any number of unforeseen experiences and encounters. By the time the residency course was due to be completed, most students had plenty of time to adapt to the distance-study mode and, presumably, would find it simpler to fulfill this requirement in a similar manner. Yet, there was no perceptible change in attendance numbers after the optional policy was instituted. Typically, during the period when the residency was mandatory, approximately 25% of the students enrolled in the MSEd

program attended the on-campus component each summer. (The university cannot house and feed more than this in any given summer.) In the first summer of optional attendance, 188 participated in one of the three, 1-week seminars offered. This is 25% of the total of 750 students enrolled at that time; had the university, in fact, been able to accommodate larger numbers, more students would have attended.

This phenomenon was noticed by two faculty mentors associated with the program, who then decided to investigate the situation with the goal of better understanding what motivates distance learners to opt for face-to-face campus-based instruction as part of their overall educational experience, even when this is not required of them to obtain the degree. It is important to note here that this study was not initiated for the purpose of evaluating the summer residency component, and great pains were taken to emphasize to respondents that the researchers wanted to know more about why they attended and whether their personal goals were met.

The authors present here a summary and analysis of responses to our questionnaire to determine what may have influenced respondents' decision to participate in a campus residency as part of their graduate distance-learning program. (The questions asked appear in the appendix.) Forty-six students returned fully completed questionnaires to us. Some were at the beginning of their master's-level study, some were midway through, and others were near completion. (The authors found that where respondents were in the process influenced the answers that they gave to some of the questions—particularly those aimed at determining the ultimate value of a residency experience.) The authors had guaranteed anonymity and requested no demographic information—something we likely will do if we decide to expand on this preliminary case study. As mentioned earlier, what was sought were reasons that respondents chose to attend the optional residency session; the expectations they had and whether those expectations were met; whether there were aspects/activities of the residency session that could not have been accomplished from a distance and, if so, what those were; and, finally, what overall benefits/value, if any, the students ascribed to a campus residency. Although it was emphasized that the authors were not seeking an evaluation of UNE's particular residency activities, positive and negative aspects permeated the responses. Some of these can be generalized to the benefit of other schools that either have or are considering a residency option/requirement; they are discussed later in this article.

The majority of reasons given for choosing to attend the summer residency seminar in lieu of additional independent study (question #1) fell primarily into three categories: the desire to meet other students in the program, to make a connection with UNE, and to interact with the professors who were serving or had served as mentors. Typical responses included such statements as, "I wanted to meet others who share similar interests, concerns, and goals"; "I wanted to see the campus and have a college experience"; and "I wanted to put faces with names of people I've corresponded with for such a long time." Secondary responses included professional and emotional rejuvenation ("I just completed one of the worst years of my teaching career; I needed to refresh my batteries and become excited about teaching again") and a wish to compare their own abilities and program performance with those of other students ("I needed to prove to myself that I'm on the same page as everyone else—not overworking/not underworking").

The respondents' goals and expectations (question #2) varied depending on what stage they were in their master's study. Again, most expressed a desire to collaborate with others and to interact with program staff and faculty. Typical responses included the goals and expectations of "networking with others," "learning about others' schools and programs," and "gathering some new techniques and instructional strategies." Additionally, however, students new to or part-way through the program were interested in learning program requirements and seeing examples of completers' work (the latter seemed particularly valuable), whereas those approaching the end of their study were seeking "closure" and "validation of" the work that they had done.

Regarding the benefits/value ultimately derived from attendance (question #3), the preponderance of respondents once more referred to the many opportunities they had to collaborate with others. There was real enjoyment expressed in meeting "likeminded others." One student lauded "the luxury of working with professionals that share my passion for education." Beyond this, answers varied widely, ranging from the very tangible result of gathering information for particular courses to the psychological/emotional benefits of "making friendships that will last a lifetime," "having the best roommate experience of my life," "having a great time away from my responsibilities at home," and "feeling like a *real* student." The authors discerned in the answers to this question an unanticipated theme, that is, the value of the kind of self-knowledge that is gained through interaction with others. One person wrote: "I

learned what I have to offer in a group experience and ways to be more successful in this area." Another summed it up thus: "I found [the residency session] beneficial both personally and socially. I am rather reserved by nature, but I see a growth in my capabilities/confidence since the summer seminar."

There was an initial surprise when it came to the question of whether the residency session had met participants' expectations: nearly as many answered "no" as answered "yes." On careful examination, however, it was discovered that the majority of the people who responded in the negative went on to explain that their expectations had been lower or fewer in number than what they actually realized. Some admitted that they had opted for the residency because they could earn three credits in 1 week on the coast of Maine, but were surprised to discover a richness to the experience of discussing pedagogical and more global educational issues with colleagues from other states/regions/countries. One wrote, "I could not have known how important the interpersonal mingling of strangers can be without having experienced it." Another commented, "I came away a better and more resourceful teacher."

The answers to question #5, the crux of this investigation, were of particular interest to the investigators. Among the aspects listed that could not be accomplished from a distance, respondents mentioned: team presentations, collaborative learning experiences, hearing presentations by former students, learning the circumstances of other educators, and meeting mentors and the program staff and director. Some mentioned that being students in a classroom/seminar made them more empathetic with their own students, that is, meeting assignment deadlines, being required to work with others in small and large groups, and so forth The responses that resonated with us most strongly, however—perhaps because they gave credence to the social role that DE must play to be optimally successful—were those that expressed real appreciation for the sense of place that they gained over the course of the residency week. Many wrote that they left UNE feeling "like [they] belonged," that they were part "of a larger learning community." Some of these feelings stemmed from the "camaraderie" established and friendships formed during the week; another factor, however, clearly was an identification with the university. One person expressed the opinions of many: "I was able to relate the program to a physical place inhabited by real humans." Yet another mentioned feeling "connected" to the school and its history.

Only 3 of the 46 respondents answered "no" to the question of whether they would recommend a residency experience to other DE students (question #6) — two with explanation. One was unhappy about the expense of traveling to Maine coupled with finding him-/herself assigned to a group the members of which (s)he felt "did not work hard enough." The second of the three "no" respondents felt that the residency period activities could have been condensed from 1 week to 3 days. The remaining 43 ("yes") respondents gave reasons already reflected in earlier questions—learning from others, meeting mentors, working with others from a range of geographic locations and a variety of disciplines—along with the more affective aspects of "bonding" and relief from feelings of "loneliness" and "isolation" as a result of working independently and from a distance. Significantly, one respondent wrote, "The residency requirement is why I picked UNE's program over some other choices."

When asked whether any aspect of the residency session could have been accomplished as effectively from a distance (question #7), two thirds of the respondents said "no"; most accompanied this response with no explanation. Those who did explain echoed earlier responses, such as the benefits of working on any assignment "together" and making personal connections with peers and mentors. In the remaining one third, a variety of activities was listed, including handouts, the assigned readings, videos, and information about the final portfolio. Two students were critical about a presenter who did not incorporate instructional strategies they had been taught in their coursework. This reaction surfaced periodically across the questions/responses; although the numbers were small, there was a clear contingent of session participants who observed carefully and expected the program's student-centered philosophy to be modeled at all times by speakers and seminar instructors.

Not surprisingly, group interaction and collaboration; diversity of participants' backgrounds and perspectives; friendship building; and forming a connection with the university, program staff, and mentors topped the list of aspects and activities that could not have been achieved via courses offered from a distance (question #8). Another theme that surfaced here was an appreciation of the opportunity to do "focused work" away from home, family, and job responsibilities. Several students also mentioned discrete elements of the residency offerings: using the university's library, receiving computer training, viewing samples of program graduates' work, the lobster and clam bake and, in the words of one respondent, "Feeling the ocean breeze on your face as you tour the

campus cannot be replicated on video."

Question #9 asked respondents to rank order from least to most valuable three aspects of the residency week. "Interaction with students" clearly was seen as the most important factor (rated most important by 26 students and second most important by another 10). "Interaction with faculty" placed second (10 students gave it first ranking and 29 ranked it second). "Identity with the institution" was rated third by 30 of the 46 respondents. The few things mentioned under "Other" included "reflection time" and "nostalgia for my college years." One person noted under "Other" as the fourth most valuable aspect his or her "personal satisfaction for having gone through the distance learning program and seeing it through to the end." Clearly, for some students, the residency represents a much-valued culminating experience to an online-degree program.

The authors were interested in learning why a face-to-face experience was so important to these people who were willing to travel rather than undertake an independent study on a topic of their choice (question #10). Interestingly, every single respondent answered "yes" for him-/herself, indicating that a face-to-face experience is important; two of these people, however, perceived that it was not important to everyone else, noting that a few others "simply were interested in gathering information, not in making connections." Here, again, these personal connections were key. One person noted that (s)he "works face-to-face with colleagues every day, so this should be an important part of a distance learning program, as well." Others appreciated an alternative to "hours sitting alone at a computer or video screen." In sum, as one person wrote, "No man is an island; we have much to offer others when meeting as a group with common goals."

Although all 46 respondents considered the face-to-face experience important, 37 recommended that any residency session be optional. Two of these added, "but *strongly* recommended"; six wrote: "I would like to say 'mandatory,' but you can't force someone to attend. Nevertheless, there were nine people who indicated that they were in favor of compulsory attendance.

The University of New England is located on the coast of Maine, where the Saco River and the Atlantic Ocean meet. There is no lovelier place to be in July, when our residency sessions are held. Consequently, it behooved us to ask whether students would have been interested in attending a residency session if it were held away from campus (question #12). Twenty-four respondents answered in the negative; 17 answered positively; four were unsure; and one gave both negative and positive responses. The large majority of "no" answers were explained by a desire to be on the campus from which the degree was being granted. Those who answered "yes" agreed with the person who wrote: "The physical location wouldn't have mattered as long as the people were there."

The authors were curious to find out whether distance learners feel that a residency session in some way legitimizes their master's degree (question #13). Approximately one quarter of the students rejected this notion, agreeing with the people who wrote, "The strength of the program will always be its curriculum, faculty, and the students it attracts" and "A student's level of commitment starts with the self; *we* make it as legitimate or real as we want it to be." On the other side, 32 respondents said "yes." Accompanying comments reiterated the impact that "the personal touch" and "the real school with real people" have, even on students who have chosen to study from a distance. One person admitted, "Rationally, [the residency session] doesn't matter, but psychologically it does." Several spoke of now having "a sense of place."

As mentioned earlier, the perceived benefits of attending a residency session differed somewhat depending on the stage of study of the individual respondent. This became all the more clear in the spread of responses to question #14. Four students selected the first option ("Attend whenever you want"), which is the way UNE's residency option currently stands; 14 opted for attending a residency session at the beginning of their studies; 16 chose the halfway option; three felt that a residency would be most beneficial upon the completion of all coursework; 10 wrote that attendance at two sessions (one at the beginning and one at the end) would be optimum; and two respondents selected "After one semester or two courses." (The foregoing numbers add up to more than 46 responses because four respondents chose more than one option.)

Finally, question #15 asked whether, in retrospect, respondents still would choose to attend the residency session. Only two students answered "no"; both of these people indicated that they were almost done with the program and, hence, found much of the information given during the session redundant. The great majority of respondents, then, wrote that they would make the same decision. Predictably, their reasons were the same as those given in response to earlier benefit/value questions. One person went on to say that the residency session was "the highlight of the MSEd program," explaining, "The summer seminar experience helped to raise the image of teaching to a higher status of professionalism."

At the heart of this discussion is the fundamental question: Can a cohort of learners studying at a distance without occupying a common geographical space achieve a feeling of place? Distance education scholar Moore (1993) formulated the principle of "transactional distance" as distance that exists between learner(s) and teacher(s) that is psychological as well as geographic. Moore postulated that this distance is reduced to the extent that the teacher effectively engages learners in active and meaningful educational experiences, whether they are face to face or physically distant. If this feeling of responsibility for, and relevance of, the learning is achieved, the psychological gap is diminished, and participants do not feel remote from one another or from the source of learning.

Without becoming too metaphysical here, one might ask if a "meeting of the minds" among a community of learners actually requires that they experience face-to-face encounters in a fixed place, or can this be achieved equally as well via online relationships or other modes of study at a distance? Bender (2003) asked, if learning can take place only under the circumstances of being in a particular location and doing specific activities, then how do people learn from books, newspapers, television, radio, letters, or e-mail? Robinson (as cited in Bender) raised an interesting point in this regard, as well, when she compared her presence in relation to her online students versus those with whom she meets at regular intervals in a classroom. She asked whether either of these two student cohorts thinks of its instructor as being "present" when the students are out of class or offline. Presumably, if the teaching environment the instructor has established is dynamic and stimulating, then students will think about both the course and the instructor outside of class time or when not online.

Certainly, all of us, whether as teachers or learners, know of classroom settings where little or no learning actually occurred. There is much anecdotal material that reveals many students completed their undergraduate studies entirely in classrooms, yet felt it was largely a dispassionate and disembodied experience when compared to highly interactive online courses they subsequently took as graduate students. Critics of DE often indict it on the basis of being impersonal and thereby minimizing students' commitment to learning. However, as Bender (2003) pointed out, students make a commitment to the pursuit of knowledge and new ideas, regardless of where it is actually happening. Indeed, most learning accomplished by adults occurs in autodidactic fashion, outside of formal instructional settings. Faculty deceive themselves if they think students do most of their learning while sitting in class or at the computer.

But what about the social dimension of learning? Wegerif's (1998) study of online learners revealed that their success or failure was closely related to whether they felt like insiders or outsiders. In this case, learning was closely associated with, and dependent on, a sense of belonging to a community of peers likewise engaged. Many faculty are somewhat chagrined to find, in reading course evaluations, that students gain the most from collaboration with other students, whether enrolled in class or online. Collaboration has long been recognized as critical to deep learning, and it is usually a teacher who creates a learning situation that promotes sharing among a community of learners. The DE literature (e.g., Tu & McIsaac, 2002) currently features a good deal of discussion regarding the notion of social presence in educational settings' lacking physical presence and how instructors can best achieve some semblance of social presence among distant students to enhance their learning goals. As Miller (1990) noted, online mentors must attend to the social role of DE, including the interrelationship among content, delivery, and the learner.

The UNE distance learning MSEd program has a widely dispersed student population, with most concentrated in the northeast quadrant of the United States and increasing numbers scattered throughout several additional regions of the country. Students are encouraged to form study groups with peers in their school or locale who are also enrolled in the program. A more interactive electronic medium (Campus Pipeline) now augments the program's more traditional features of correspondence via the mail and phone. Faculty and staff have a generally favorable reputation among students for prompt feedback and response to questions, and student evaluations of instructional materials are consistently positive. Thus, the program can claim to have a reasonably high degree of social, cognitive, and teacher presence, as defined by Tu and McIsaac (2002).

However, is it still possible for a cohort of distance students who do not occupy the same special environment to generate a feeling of place? Students share materials, faculty, projects, information and ideas. Nevertheless, these teaching-learning processes do not occur in a common physical space or necessarily at the same time; rather, they occur in what now is commonly referred to as cyberspace. Does this lack of physical proximity reinforce feelings of separation and remoteness among students that cannot be overcome even by the most highly interactive electronic medium designed for instruction? There is

certainly much anecdotal data now available which tout the efficacy of interactive online systems and skilled online mentors able to transcend the transactional distance phenomenon and "close the gap" between the two axes of teaching and learning at a distance. The data from the study reported here indicate that, despite a good deal of interconnectivity among students, teachers, and the institution, the relational distance that still persists mitigates against that essential sense of a larger community of practice. This seems to contribute further to a sense of place's remaining elusive for these distant students as well.

This study has focused on factors that motivated distant learners to attend optional residency sessions on campus and an assessment of whether or not their experiences met their expectations. The authors' intention was not to examine the impact of respondents' residency experiences on their future distance learning or on their subsequent professional practice as teachers. However, this would be a worthy topic for future research. For instance, how might participation in a residency session as part of a broader series of distance learning activities influence respondents' motivation to complete their master's studies? Might a residency change their attitudes regarding their continuing role as teachers? Did the residency experience enhance their persistence as students? Did it revitalize them as teachers? There is a significant amount of anecdotal evidence to this effect in this study, but there is more to discover. If these outcomes are so, what, in particular, occurred during the residency to make this happen, and can it be confirmed that, in fact, the residency participation caused any such changes?

Cookson (1990) and Tinto (1987), among others, have looked at how and why student satisfaction contributes to continuing participation. While the purpose of providing distance learners in UNE's program with a residency option is not to strengthen persistence or to increase completion rates, it would be most interesting to scholars, and probably quite useful to practitioners, to better understand how value-added features such as residency sessions might enhance student satisfaction and subsequently promote higher completion rates. There is ample reason to believe, for example, that persistence in distance doctoral education is related to adult learner-faculty mentoring strategies that focus on increasing integration with the institution (Stein & Glazer, 2003).

Another potential area of inquiry, also prompted by a good deal of anecdotal data from program participants, is how motivation for continued enrollment in a distance-learning program evolves over time. In particular, does attendance on campus change the nature of participants' motives for wanting a degree? Clearly, many of these students initially enroll in a master's degree program due to extrinsic factors (e.g., salary increases), but their desire to obtain the degree often shifts to more intrinsic reasons (e.g., the satisfaction of increased personal growth and professional development). Is this change more pronounced among those who interact with peers in a shared campus experience, or is it likely to occur as often with students who never have face-to-face encounters with their student peers? It may be instructive and useful to control for respondents' age, gender, and, perhaps, number of years in teaching to determine if any of these characteristics might influence students' motivation to attend and their opinions of the experience. Somewhat related, it would be of interest to identify respondents as to their progress in their master's studies, to ascertain if any significant differences regarding reasons and reactions concerning their participation could be correlated to the number of distance courses completed to date. For instance, would students closer to program completion be more receptive to a face-to-face experience simply as a welcome antidote to so much independent study?

The authors of this study would be curious to know more about the influence of the mode of distance delivery on students' decision to opt for a face-to-face experience, rather than complete all of their coursework at a distance. In particular, would a more interactive delivery system than the one currently utilized by the University of New England (i.e., a fully online format, as opposed to one which has more limited features for asynchronous electronic dialogue) diminish students' desire to seek onsite interaction with peers? Finally, yet another aspect about which it could be useful to obtain more data is whether or not the ratio of DE programs requiring a residency has changed over the past 10 years and, if so, to identify the factors that have contributed to this shift. If the rather high percentage of residency requirements has diminished among DE programs today, has this been due to enhancements in the interactive features available via instructional technology, changing demands for greater flexibility and convenience among consumers, pedagogical considerations, space constraints, or perhaps greater acceptance of DE as a legitimate means of obtaining a degree?

Although this study was intended to gain insight into reasons why students enrolled in DE programs chose to attend an optional residency session, rather than to determine whether or not they were satisfied with the experi-

ence, the data obtained provide information that can be useful to institutional planners and administrators responsible for making decisions regarding the design and delivery of DE programs, including whether or not a residency component is feasible and/or desirable.

Before matters of content and format of any face-to-face activity can be determined, the more fundamental question regarding the appropriateness of congregate sessions in the context of DE programming must be addressed. Despite respondents' obvious enthusiasm for their residency experience, the authors of this study are reluctant to advise on this matter. There are those who likely would argue that no academic program defining itself as DE can rightfully make such a claim if any residency requirements are imposed on learners. Others might argue that the benefits of some face-to-face activity are so compelling that this should be a mandatory feature of any programs that offer instruction at a distance. The authors tend here to side with the majority of respondents in this study in endorsing the optional approach (i.e., include a residency experience, but make it elective).

Similarly, the authors side with the majority of respondents regarding the question of when such a residency session is optimal in a matriculant's program of study. Two thirds of these participants recommended it be taken at the beginning or no later than midway through a program's life cycle. One strong argument for encouraging early on-site learning in a DE program is to achieve the "bonding" effect that can be so beneficial to learners engaged primarily in independent study. However much they may be mature, self-disciplined, autodidactic learners, most seem to derive significant benefit from some closer connection with the institution, faculty and staff, as well as with their peers. An earlier rather than later seminar experience on campus also enhances the faculty mentors' social presence throughout the remainder of students' studies at a distance.

Regardless of when, what, and how residency experiences are integrated into a DE program, it is strongly advised that decision makers include such activities for their perceived benefits, rather than for reasons that are considered politically correct or financially advantageous. Although our data indicate many participants are reassured by the residency experience that their DE program is "real," a residency component should not become part of a DE program simply because the institution feels this will give the overall program increased legitimacy. At this stage in the evolution of DE as a worldwide educational phenomenon, there is surely no need to add a face-to-face requirement simply to assure participants or observers that it is a legitimate academic enterprise.

Those responsible for planning and administering residency programs must take great care to do so carefully; they should be attentive to content, to modes of instruction, to selection of faculty, to pace, balance of structure with flexibility, and the like. All that occurs should be compatible with the overarching philosophy of that program. In short, the residency should complement the distant study, not compensate for it. It is especially incumbent on teacher education programs to be vigilant in what they offer their clientele; students who are themselves teachers can be particularly harsh critics of weak pedagogy and mediocre service. Moreover, even when positive feedback is the norm, attention must be given to suggestions for improvement, as such comments from a few more outspoken students often reflect the sentiments of the larger population. Finally, it is critical that structured evaluative feedback be regularly and actively sought from residency participants. Too often, administrators of seemingly successful academic programs blithely replicate next year exactly what was done the previous year with the attitude that "nothing should be done for the first time."

> I am concerned about the proliferation of online degrees. I know these programs fill a need, but I believe that a residency requirement makes each student a stakeholder…. It is fair to ask at least a short residency session of anyone asking to get credit for an advanced degree."

> I needed to experience the people and the place so as not to feel like I earned a "fictional" degree.

To the authors of this case study, the foregoing excerpts from two of the respondents' questionnaires effectively capture the sentiment that lies at the heart of most of these students' rationales for attending. On the one hand, there is every indication that the strong majority of matriculants in this DE master's degree are quite satisfied with the quality of the education they are receiving, with faculty engagement and attention to their academic endeavors, and with the institution's support services; yet, on the other hand, however positive may be their overall opinion of the program, there is a need that persists among most of them, as is clearly manifested in their responses to the questionnaire, for an additional opportunity to interact more directly with peers and mentors. They view this as value added to an already valuable learning experience and one that "legitimizes" their degree program. Interestingly, though, very few of these students cited new learning acquired during the residency as its most important benefit. In fact, nearly all empha-

sized peer interaction as the most laudable feature of this campus experience. This evidence makes it quite clear that however advanced may be the technology that allows "anytime-anyplace" learning in this new digital age, and as welcome as the convenience and flexibility it offers may be for busy, working adult learners, many students are reluctant to forsake a chance to remain involved, even if it is at some added inconvenience and expense to them, in a more conventional campus-based activity that establishes a bond which no distance delivery system can match.

Appendix

Residency Questionnaire

1. Why did you choose to attend UNE's summer residency session rather than complete the alternative project?
2. What goals/expectations did you have before attending?
3. What benefits/value were/was ultimately derived from attending?
4. Overall, did the session turn out to be what you had originally expected? Please explain.
5. What aspect of the session did you find most important, and would it have been possible without attending?
6. Would you recommend a residency experience to others enrolled in distance education programs? Please explain.
7. Was there any aspect/activity of the session that could have been accomplished just as effectively from a distance?
8. Is there any aspect/activity of a residency session that just can't be achieved via courses offered at a distance?
9. Which of these benefits do you consider most valuable? Rank order (i.e., 1, 2, 3).
   Interaction with faculty ___
   Interaction with students ___
   Identify with institution ___
   Other (briefly describe)
10. Do you think it is important that all distance education programs offer a face-to-face experience for students? Why or why not?
11. Should a residency session be optional or mandatory?
12. Would you have been as interested in attending a residency if it were held at a location other than the UNE campus?
13. Do you think that participation in a residency session makes the MSEd program more legitimate or real? Explain.
14. Which residency model do you think would be most effective?
    ___ Attend whenever you want
    ___ Attend at the very beginning of your studies
    ___ Attend about halfway through the program
    ___ Attend after completing all other courses
    ___ Attend once at the beginning and again at the end
    ___ Attend once, but make it a 2-3 week session
15. Having attended the session, would you choose to do so if making the decision now? Why?

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Online & On-screen: Library Resources Come to the Desktop

Marsha L. Burmeister

The student searched the library catalog using the terms "instructional technology" and, from the list of books in the category, selected Educational Media and Technology Yearbook 2000 *(Branch & Fitzgerald, 2000). After a quick glance at the table of contents, the student flipped to page 49 to an article titled "Tools for Automating Instructional Design" and began to read.*

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Introduction

The above scenario appears to be quite common until placed in the context in which it happened: completely online. The search of the netLibrary® database yielded the list of e-books that brought the book (one of over 16,000 copyright-protected full-text e-books and 3,000 public-domain texts), to the screen. Library subscription to this database enables patrons' free access to the e-books from any computer, anytime, anywhere. Going to the library takes on a new dimension at a distance. Library resources online include e-books, reference materials, online libraries, instruction in bibliographic research, and virtual resources. This is the first article in a series that will discuss each of these resources, beginning with e-books.

It is increasingly common for libraries to include digital materials in their collections and the movement from paper books ("p-books") to e-books is an appealing idea (Press, 2000). These electronic items may include dissertations, journal articles, numeric data, digital maps, and e-books. Each of these items can be referred to as a "digital object" larger than 1.4 megabytes (Jantz, 2001). Additionally, many e-books are available via the Internet without cost or subscription to a database. This article will define e-books, detail the process to obtain an electronic book, and summarize several Web sites that provide free and open access to e-books.

Definition: e-books

The history of the e-book began with the development of the "Dynabook" prototype by Allan Kay in 1972. More than 30 years later, digital objects can be found in today's libraries and online in several formats, including Portable Document Format (PDF), Microsoft Reader with Clear Type, and XML-based Open e-Book Publication Structure. The Open e-Book format is one standard based on HTML and SML and was developed by the Open Book Initiative of the National Institute of Standards and Technology (NIST) (Press, 2000). E-book formats have not been standardized. The Association of American Publishers defines e-books as "a literary work in the form of a digital object consisting of one or more standard Unique Identifiers, Metadata, and a Monographic body of content, intended to be published and accessed electronically" (Dowdy, Parente, & Vesper, 2001, p. 2).

Using an e-book

The distribution of e-books can take several formats and can be referred to as the development of "e-ink" (Crawford, 2003). Patrons may "check out" the digital book by downloading the book to a computer so it appears online. Earlier implementations of e-books included downloading the e-book to a reader device such as a PDA; this earlier implementation has gone by the wayside to the point that the primary means to access an e-book currently is to view books onscreen as a PDF or Web-based text-only document. Internet-based providers include netLibrary, Questia, and Ebrary; subscriptions to these databases of e-books can be purchased by libraries to form a digital collection. For example, netLibrary provides full-text books in all subject areas, including over 16,000 copyright-protected e-books as well as an additional 3,000 public-domain texts. Thus, patrons of subscribing libraries may "check out" the digital book by accessing the book via computer so it appears onscreen. Copyright is protected by limiting the amount of text that a user can download or copy or by limiting the use of the e-book to one user at a time (Dowdy, Parente, & Vesper, 2001). Text that is in the public domain is easily placed online without copyright constraints.

E-book technology offers some unique features not associated with traditional print that may be perceived as advantageous to the use of e-books. These include 24/7 access via the Internet, the ability to search the text electronically, the ability to change text size, to include hyperlinks to Web-based resources, to update the content, bookmark pages, and access a dictionary integrated into the book-reading experience (Hutley & Joseph, 2001). "Pages" are "turned" electronically by mouse or keyboard input. Distribution is available without the constraints of time or location.

A major concern expressed by critics is that e-books are not comparable to print books in terms of display, print quality, the need to use a reader (computer or PDA), the size of the file for download, and reading speed (Sottong, 2001). Another concern is the linear nature of e-books, similar to a microfilm reader; it is difficult to skim an e-book or move around an e-book as one can with a physical book (Nesta, 2001). A study by Simon (2002) suggested that students who used an e-book were eager to adopt this new technology on a larger scale. Much depends on the preferences of the reader, who must determine a comfort level with text on-screen. Readers who seek "bestsellers" will be disappointed, as e-books in subscription databases tend to be older titles; digitization is not matching the pace of traditional paper publishing.

e-book Web Sites

- *The Online Books Page*
  http://digital.library.upenn.edu/books/

While at first glance this site is rather "plain vanilla," it is a treasure trove of digital books, listing more than 20,000 online books freely readable over the Internet. The site includes an index of thousands of online books, links to significant directories and archives of online texts, special exhibits of "particularly interesting classes of online books," and information about how readers can help support the growth of online books. The Online Books Page was founded in 1993 and is edited by John Ockerbloom, digital library planner and researcher at the University of Pennsylvania, where the site is housed. Books are listed by authors, titles, subjects, serials, and new listings. A book search is available, and features of the site include "A Celebration of Women Writers, Banned Books Online, [and] Prize Winners Online." The sources of the books are identified; the Gutenberg Project is well-represented.

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- *The Harvard Shelf of Classics*
  http://www.bartleby.com/hc/

Hosted by Bartleby.com, this site is identified as "The most comprehensive and well-researched anthology of all time comprises both the 50-volume '5-foot shelf of books' and the 20-volume Shelf of Fiction. Together they cover every major literary figure, philosopher, religion, folklore and historical subject through the twentieth century." The site is searchable; the site also includes introductions, guides to reading, and indexes, and is highly rated for its comprehensiveness and authority.

Summary

There is a distance to go in terms of the universal acceptance of e-books as a viable library collection component. For distance students and educators, this is another means to deliver content beyond journal articles and textbooks. Digital objects can be placed on "electronic reserve" that can mirror the traditional paper practice. E-books have both advantages and disadvantages and the preferences of the reader will determine the extent to which e-books are on one's reading list, required or recommended.

In terms of moving forward with e-books, perhaps Crawford (2003) said it best: "The best libraries have more than one room. The best libraries use more than one medium. Most real-world problems require more than one solution. That's life—messy but wonderful" (p. 88).

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"The best libraries have more than one room. The best libraries use more than one medium. Most real-world problems require more than one solution. That's life—messy but wonderful." (Crawford, 2003, p. 88)

—Crawford (2003, p. 88)

The Classics are Coming Back!

Seven classic publications in the field of instructional technology are once again available. These seven are a must for professionals in the fields of instructional technology or distance education.

Extending Education Through Technology, a collection of writings by Jim Finn, long considered the "father of educational communications and technology," features articles written by Finn decades ago that are still widely quoted and directly relevant to the issues of the field today.

The history of the field, *The Evolution of American Educational Technology*, by Paul Saettler is *the* basic reference for how the field has grown and become the driving force in education and training that it is today.

Three books on this list of classics, Ball and Barnes' *Research, Principles, and Practices in Visual Communications*, Chu and Schramm's *Learning from Television*, and Ofiesh and Meierhenry's *Trends in Programmed Instruction*, are the primary sources for research and design in instructional technology and distance education. Some claim, and they are probably correct, that much of what are considered "best practices' today can be traced directly back to the conclusions provided by these three extremely important monographs..

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Three Issues in Distance Learning

Regina Bobak, Connie Cassarino, and Calvin Finley

Introduction

As doctoral degree candidates in the Instructional Technology and Distance Education (ITDE) degree program, at Nova Southeastern University, we have been consistently taught and challenged to reflect on trends and issues related to distance education.

The curriculum offers specific courses related to this topic, as well as other courses, that indirectly asks the student about connections to issues and trends related to distance education. We have found that there are several consistent issues, and concerning them, significant steps to take to address these issues.

This article discusses three specific issues: the digital divide, academic dishonesty, and transactional distance learning theory. Each issue in this article is introduced and explained, the issue is discussed as related to distance learning, and specific steps are identified to reduce or embrace the issue to leverage distance learning to its capacity.

The Digital Divide

The computer and the Internet have opened a vast array of opportunities and have stimulated unprecedented growth over the past decade or two. Yet, there are still large sectors of Americans that are excluded from enjoying these opportunities. Pearson (2002) gives her interpretation of what has come to be known as the "digital divide" as a separation between those who have access to and can effectively use technology and those in our society who have access to and cannot use technology effectively.

This issue is coming to the forefront with the increasing numbers of schools, in both K-12 and higher education, that are transforming to a wireless environment or who

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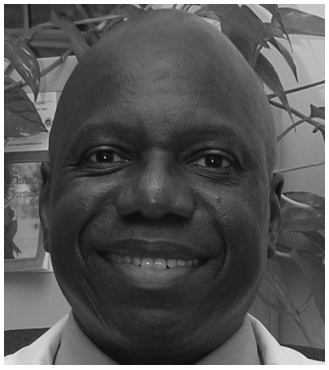

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require students to have access to laptop computers. Although students may have access to the Internet at school, this does not necessarily ensure that they will have access at home. Also, there remains considerable disparity in access to computers in schools, between the rich and the poor and between Whites and ethnic minorities (Pearson, 2002). A report from the National Center for Education Statistics (cited in Pearson) found that in schools with a minority population greater than 50%, only 37% of the instructional rooms have computers, compared to 57% of instructional rooms in schools with a minority population less than 6%.

According to Pearson (2002), American society is entering a time when there is a new type of inequality. Those individuals that have access to, and can effectively use computers have access to more information than at any other time in our history. However, a substantial portion of the population is being left behind. Leaders in ITDE must insure that technology does not expand the divide between the "haves" and the "have nots."

There are core community values that become elusive as part of the digital divide: (1) participation in the civic life of the community, (2) collaboration in problem solving, and (3) a sense of being connected. In order for communities to survive and prosper, each member of the community must feel connected to the community. Instead of technology helping to unite the community, it can cause separation within the community and between communities if there is inadequate access to—and ineffective use of—technology (National Telecommunications and Information Administration, NTIA, 2000).

Those individuals who are among the "haves" take for granted the ubiquity of the Internet; it is everywhere, and most of the "haves" take for granted the ease of accessibility, especially of high-speed connections in the workplace, in schools, in libraries, and even in a growing number of homes. But, for the "have nots," even basic connectivity is a substantial barrier to become part of the information society (NTIA, 2001). As suggested by Pearson (2002), the first step in bridging the divide is for leaders in ITDE to realize that not everyone benefits from the advances in technology that are taking place in our society.

Steps must be taken on the local, as well as national level to ensure that all members of society have equal access to technology. One example of community-building through the use of technology, as reviewed by Pearson, is the College Reach-Out Program (CROP), which is a collaborative effort of Central Florida Community College, Santa Fe Community College, and the University of Florida (all mid-Florida institutions). The purpose of CROP is to expose disadvantaged students to innovative projects that help them realize the importance of computers and technology and how access to—and effective use of—technology can benefit them now and in the future.

The digital divide is an issue that requires constant review and evaluation by all those involved in instructional technology and distance education. In order for the disparity between the "haves" and the "have nots" to be erased, or in the least narrowed, it requires a concerted effort on the part of all individuals and organizations that deal with computers and technology on a day-to-day basis. The growth and survival of our vital infrastructures, social, economic, and educational, depends on our insistence on insuring opportunities of access to technology to all members of society.

Academic Dishonesty

A student sits down at a computer to complete an essay assignment for an online course. She is struggling writing the essay that is due within 48 hours. She does an Internet search for her topic and finds a Website that has "examples" of essays on her topic for a fee. She purchases the essay and turns in her assignment the next day. How does the instructor ensure that the student submitted her own work?

Academic dishonesty is not new to education. Davis, Grover, Becker, and McGregor (1992) reported that 40% to 60% of the students in their study cheated on at least one examination. With the advances in technology and the geographical distance between student and instructor, there is a perceived increase in the prevalence of academic dishonesty (Kennedy, Nowak, Raghuraman, Thomas, & Davis, 2000). This perception of academic dishonesty is a serious threat to distance education.

The offenses of academic dishonesty for distance education include similar offenses for classroom instruction such as plagiarism, concealed notes for tests, buying essays, or exchanging work with other students. Technology and geographical distance has provided ways around the traditional offenses. Emails, rather than notes or erasers, are used to pass answers. Scanners, such as the C-Pen (www.cpen.com), can be used to scan documents that can be downloaded to a PC or PDA. Word processing has made it easier to cut and paste information from electronic media. Websites, such as "Term Paper Relief" (www.term paperrelief.com) and "CheatHouse" (www.cheathouse.com), allow essays to be purchased or downloaded and also provide customized papers for a fee. Electronic discussion boards may provide assistance to students who in turn paste the

answers into their own work without acknowledging the assistance.

Just as in a classroom setting, there are ways to prevent academic dishonesty in the online environment. Simonson, Smaldino, Albright, and Zvacek (2003) recommend focusing on strategies for preventing academic dishonesty and assisting students to resist the temptation. This can be accomplished by developing a clear policy on ethics for academic dishonesty. It is also important for faculty to clearly identify their ethical standards in the course syllabi before the class begins and follow through with punishment if academic dishonesty occurs. The current generation of students has been downloading music and games from the Internet without giving thought to copyright laws. They need to learn how to gather accurate information online and cite it accordingly. The instructor must practice good ethics as well with course materials and students' work.

Sound instructional design will also assist in reducing academic dishonesty. The course should contain a variety of assessments along with opportunities to interact with the students. An electronic portfolio is one way to store a student's work. Paper-and-pencil tests can be done electronically. To prevent academic dishonesty, the instructor can use a log-in system in which the username and password is sent to the student just prior to the test being made available. The username and password can be changed for each assessment by using Blackboard or WebCT to deter academic dishonesty. Dates and time limitations can also be set for tests, along with randomization of questions. Remember, resources are still available for the student when taking the test. Questions need to be written requiring the student to comprehend basic information. Incorporating short answer and essay questions gives the instructor the opportunity to compare the writing with other written assignments, such as threaded discussion and term papers.

Another strategy is to utilize interaction between students and the instructor. Utilizing group projects can help prevent academic dishonesty. It would be difficult for a student to find consistent help throughout complex projects that involves others over a period of time. Instructors can get to know their students by using frequent emails and chat sessions. These interactions will give the instructor a better feel of a student's abilities. At different points in the semester, the instructor can place phone calls to discuss assignments that have been submitted by the student.

Written assignments can be effective assessments by requiring the students to relate the topic to their own personal or professional experiences. Another method is to have the students turn in drafts before the final submission. All drafts and final papers should be submitted electronically to keep a record of submissions. Email and drop-box features are common for submitting documents. Just as the Internet is assisting in plagiarism, it can help curb the issue. The instructor can use online bookstores and libraries to check references. Keyword searches can be done on the Internet through search engines such as Google (www.google.com). Essay Verification Engine (EVE2) (www.canexus.com/eve/index. shtml) or Plagiarism.org (www.plagiarism.org) are services available to submit papers for review of plagiarism.

Academic dishonesty has always been a concern for instructors and will continue to be a concern. Instructors need to be proactive and vigilant by considering alternative assessments and modifying course materials on a regular basis. Underwood and Szabo (2003) stated, "the range of dishonest practice is limited only by students' abilities to use technology creatively" (p. 470).

Transactional Distance Theory

Transactional distance is the perceived distance between the learner and teacher, which can affect the instruction and interaction between the learner and teacher. The interaction can be negatively affected by the perceived distance. This section of the article will describe several variables within the teacher-learner interaction, and will tie in learner autonomy to this learning theory (Wheeler, 2003).

Moore and Kearsley (2005) defined transactional distance as: "the gap of understanding and communication between the teachers and learners caused by geographic distance that must be bridged through distinctive procedures in instructional design and the facilitation of interaction" (p. 223). The transaction of instruction between learner and teacher then, can affect behaviors. These behaviors fall into two variables or categories: dialog and structure (Moore & Kearsley, 2005; Wheeler, 2003).

Dialog

Dialog is the messaging and response between the learner and teacher. According to Moore and Kearsley (1996), "The extent and nature of this dialog is determined by the educational philosophy of the individual or group responsible for the design of the course, by the personalities of teacher and learner, by the subject matter of the course, and by environmental factors" (p. 201). Size of a learning group, language, and medium are three environmental factors to consider when designing instruction. How

does the size of the learning group impact dialog? One-to-one dialog between learner and teacher is more probable than a group of learners to one single teacher.

Adding to this, Wheeler (2003) suggested that this could also mean learner-to-learner interaction or interaction between instructional materials and the learner. Wheeler also suggested that these environmental factors should also be considered during the design of face-to-face instruction. In terms of medium, the primary mode of dialog will most likely take place through the use of technology. Wheeler (2003) indicates that "technology, if used effectively, can provide students with learning experiences that qualitatively correspond to those experienced in traditional modes of delivery" (p. 91). Media such as email, threaded discussions, and Web logs ("blogs"), can be used to build and share ideas, construct knowledge, and build upon social networks and mentoring communities.

Structure

Structure relates to the elements of the course, such as learning objectives, instructional strategies, assignments, assessment and evaluation, and schedule. An instructional designer may choose to organize a course structure with rigidity or flexibility. What is key to transactional distance theory, is the organization of course structure and the ability to meet learner needs (Moore & Keasley, 1996) without frustrating the learner or allowing the learner to flounder. This idea is tied directly to learner autonomy.

Learner Autonomy

Both Wheeler (2003) and Moore and Keasley (1996) discussed the second dimension of transactional distance learning theory as learner autonomy, relating this dimension back to dialog and structure. Wheeler (2003) suggested that distance learners are autonomous to a great extent, in order to support and carry out their learning initiative. This is why an understanding of transactional distance theory can be used to diminish perceived distance and encourage positive dialog and sound instructional structure. While adult learners are autonomous and motivated to self-regulate their learning experience, instructional designers can benefit from drawing on methods to help motivate self-regulated learners. One method is the ARCS model of motivational design (Driscoll, 2000). The ARCS model uses the following strategies: gain and sustain Attention; enhance Relevance; build Confidence; generate Satisfaction. According to Driscoll (2000), instructional designers building the ARCS model into instruction "analyze the audience, define motivational objectives, design a motivational strategy, and try out and revise as necessary" (p. 301).

Finally, teachers and instructional designers ought not to rely too heavily on learner autonomy. It is important to understand the impact of transactional distance theory has on learner-teacher behaviors. Addressing dialog styles and strategies, and designing sound course structure will diminish learner floundering and increase rich dialog patterns, and behaviors. Rich behaviors are evident not just between learner and teacher, but also between learner-to-learner and learner and instructional materials.

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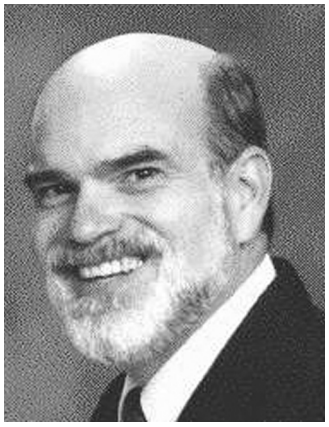
Motivating Students in Distance Education

Todd A. Curless

The dropout rate in distance education courses is often much higher than in similar courses taught face-to-face. Reasons given for dropouts from distance courses include lack of finance, lack of time, the isolation of the distance learner, lack of self-discipline, and lack of motivation.

Some of these issues are beyond the control of the instructor or the course designer, but motivation is something that can be improved. A learner may be initially excited to work on a course, but as the course goes on without the daily or weekly "face time" with the instructor and other students, motivation may flag. Eventually, without an infusion of motivation, the learner may drop out of the course.



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Keller's (1987a, 1987b) ARCS Model of Motivational Design provides a structure for the infusion of motivational tactics into instruction in order to create and maintain the students' motivation to learn. The ARCS model organizes the various theories that are commonly thought of as motivational processes into four categories, asking how we can:

- gain and keep the learners' **Attention**.
- make the instruction **Relevant** to the learners.
- increase the learners' **Confidence** that they can succeed.
- ensure that the learners will have a sense of **Satisfaction** of having done well.

The answers to each of these questions are in the form of motivational techniques, or tactics, that can be designed into a course to increase the students' motivation. Some of the tactics specific to distance education courses are outlined below, in the context of the four ARCS motivational categories.

Attention

The best designed distance course will have no effect if it does not first get the learners' *attention* or activate their curiosity. Curiosity comes in two forms: appeals to the senses (perceptual curiosity), and appeals to the mind (conceptual curiosity).

Perceptual Curiosity

Things that are unexpected or out of the ordinary, such as sudden flashes or sounds, will stimulate perceptual curiosity. On the computer screen, unique or moving icons, pop-up windows, or other animations will attract attention. Streaming video or audio may be sufficiently out of the ordinary that students are likely to look at it.

A simple way to stimulate perceptual arousal in a live presentation is to include a picture or piece of text upside down (Keller, 1999). In a synchronous PowerPoint show, an upside-down slide can be made to look accidental. PowerPoint's NewsFlash transition can give the impression that the slide is being turned right-side-up.

Perceptual tactics in distance learning need not be restricted to visual or aural effects. The learner can be instructed to manipulate a real object, taste a certain kind of food, or even use a scratch-and-sniff card.

Perceptual tactics usually create only a momentary effect. Once we get the learner's attention by appealing to the senses, we want to maintain it and turn it toward the

purpose of the instruction by appealing to the mind.

Conceptual Curiosity

Engaging the mind by arousing a sense of inquiry has a more lasting effect on attention, and is usually more relevant to the topic of instruction than appeals to the senses. Conceptual curiosity, or inquiry arousal, is about ideas, as in "I wonder why…." You can introduce a topic by asking a question to which the students will not have the answer until they complete the assignment. For example, telling learners in a chemistry lesson that table salt is a combination of two poisonous chemicals (sodium and chlorine) can get them speculating on how that can be.

A WebQuest (Dodge, 1997) is an online problem-solving project that takes advantage of the lasting effects of conceptual curiosity. In *Preventing mad cow disease in California* (Grassi, 2004), the learner is cast in the role of a public health officer whose task is to create a public service announcement concerning the facts about the disease.

Variability

Another way to maintain attention is to vary some of the things about the course. You can vary the presentation methods, assessments, and interaction. If most of the units are online text, a streaming video or a game can break up the sameness. Include links or references to outside resources, such as Web sites, textbooks, or articles. If most of the assessments are multiple-choice tests, sprinkle in matching, short answer, essay, or project-based assessments. Interactions can be in the form of bulletin boards, synchronous chats, telephone conferences, and so forth. An occasional change of background color can relieve the uniformity.

Variability can easily be overdone. If everything is different from everything else, then the difference becomes the norm. There should be a pattern so the variant tactic will stand out.

Relevance

Once we have attracted our students' attention, we have to use other techniques to keep them motivated. The second category in the ARCS model is *relevance*. Relate the instruction to their everyday lives by showing them how the skills they are learning will apply to their needs, and by giving them familiar examples. Use familiar terms for the course components and assignments, such as class sessions, bulletin boards, and homework (even though all the work may be done at home). A short piece of instruction on the Web can be called a "lecturette."

Use visuals and examples liberally, but be sure they are appropriate to the subject. Irrelevant pictures used only for decoration are more likely to cause confusion than to create motivation. Use visuals that the students will recognize easily. Analogies to familiar subjects are good relevance tactics.

Get to know the students, and use their names frequently (Brophy, 1998). Whenever they see their own names, the message is automatically relevant to them. Use a salutation in emails, and be sure to find out what name they prefer to go by; you will get a better rapport with Juanda if you call her Jaye, the nickname she uses with classmates.

In chat sessions, use classroom-type terms for protocols to help the learners relate the procedures to familiar activities. They can "raise their hands" to ask a question by typing a question mark, or type an exclamation mark to make a comment (Ko & Rossen, 2001).

Invite a well-known "speaker" to attend a chat session. The author of their text or another recognized expert in the field would be an excellent choice. Another possibility is a previous instructor, who can discuss the relationships between this course and previous instruction the students have received.

Confidence

Students should be encouraged to have *confidence* that they can succeed in the course. There are two sides to this concept; confidence that they will be able to master the skills being taught, and confidence that they will be able to pass the course.

Make available an orientation to the course and to the course delivery technology, and make sure students use them. Ensure that the students can find the course objectives and grading criteria. You could set up a quiz in the form of a "treasure hunt" in the first week of the course to find specific facts about the course, to make sure they have read the syllabus and have explored the course Web site. Give access to the entire course site as early as possible, and get them to use the tools early in a nonthreatening context, such as a noncredit quiz or a practice discussion topic. To help personalize the course, have the students post a personal or professional profile in the discussion area. This will help them get familiar with each other as well as get practice with the tools.

Distance students are less likely to ask "minor" questions about the assignments that might be asked in class just before dismissal, so detailed objectives and grading criteria are essential. Include examples of assignments. Good examples are useful, as well as poor examples with the correctional feedback. If you use previous students' work, be

sure to get permission, and remove personal identifications.

Allow chat time for off-topic and social interaction (Ko & Rossen, 2001). Either set a specified time at the beginning of a chat for social discussion, or ask that it be held until the end of the session. When a student shares the announcement of having passed a certification test, or reports on the progress of the new baby in the family, it helps foster the development of the class into a community.

Feedback, both formal and informal, is highly important in distance settings. Communicate often. Documents submitted electronically can be edited or annotated in the file and returned to the student. You can use the "comments" or "track changes" features of the word processor, or type your comments directly in the text, using a different color to make the comments stand out.

Students are often unsure that their emailed submissions actually go to you rather than disappearing into cyberspace, so send receipt notices for assignments. Most course management systems can send automated receipts from the digital drop box.

Personal Control

Another way to increase the students' confidence is to give them some personal control over the learning experience. Asynchronous courses usually allow for more personal control than do synchronous courses. The students choose when and where to access the course, and often choose how long they take to complete the course. Where prerequisite knowledge is not an issue, students can be allowed to complete the sections of the course in any order. In synchronous settings, students should be allowed to ask questions as they would in a face-to-face classroom.

Satisfaction

Not only should students be confident that they will succeed, but they should also be able to have *satisfaction* in having succeeded. This can be done by ensuring that the consequences of success are valued by the students. Consequences consist of extrinsic rewards and the natural consequences of the instruction or skills.

Extrinsic Rewards

Most instruction is set up with an external reward, whether it be a certificate of completion, a grade, or a promotion. Grades are usually the first thing that comes to mind when considering external rewards. If assignments are arranged so grades are available early and often, students will know how they are doing, increasing both confidence and satisfaction. The online gradebook function available in many course management systems allows students to keep track of their progress during the course. In a training course in which formal grades are not used, self-checks or progress checks can be used to keep track of progress. The course menu can show the modules or assignments completed in a different color.

There's a lot more to extrinsic rewards than just grades. When sending feedback on assignments, try to start the message with something positive, even if it's "Thanks for sending your assignment." Using students' first names or nicknames can increase their sense of satisfaction with the course. Occasionally sending encouraging messages has been shown to increase student satisfaction with a course (Visser, Plomp, Amirault, & Kuiper, 2002).

Natural Consequences

The intrinsic rewards that derive from the instruction are called natural consequences. The good feeling that comes from mastering a new skill is a natural consequence. The ability to do one's job faster or better is another.

Authentic assignments can increase the natural consequences of the instruction itself. I encourage my instructional design students to design an instructional unit that they can use in their workplace (this also increases relevance; many tactics cross the lines of categories).

Equity

The final component of the satisfaction category in the ARCS model is "equity" (Keller 1987a), both in assessment and in the value of the course. Equity in assessment means that similar quality of work will receive equal rewards (grades). Even if grades are not posted, students will compare grades, particularly if they have created a good learning community.

Equity also means that the perceived value of the reward is equal to the perceived amount of work required to complete the course. Make sure your expectations are known at the beginning, and let the students know that the goal is attainable. Review the expectations occasionally if the course lasts more than a single session.

In cases where the course is available both by distance and in person, the two delivery methods should require the same amount of work, and the grade or other reward for the distance course should be as valuable as that for the in-person course. The same goes for "testing out" of a course; if the goal is to reward the learner for having mastered the skill, the reward should be the same for demonstrating the skill, regardless of how it was learned.

SUMMARY

Course designers and instructors can affect the motivation of their distance students through good motivational design of the instruction. Getting the learner's attention, making the instruction relevant, and increasing the learner's confidence and sense of satisfaction will help reduce the dropout rate that seems to come with the distance education model.

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"GETTING THE LEARNER'S ATTENTION, MAKING THE INSTRUCTION RELEVANT, AND INCREASING THE LEARNER'S CONFIDENCE AND SENSE OF SATISFACTION WILL HELP REDUCE THE DROPOUT RATE THAT SEEMS TO COME WITH THE DISTANCE EDUCATION MODEL."

Online Case-based Learning

Components, Applications, and Assessment

Hyeonjin Kim, Michael Hannafin, and Minchi Kim

The use of cases in instruction has a long history, especially case methods for professional education such as law, business, medicine, and teacher education. The role and application of cases vary in purpose, cost, topic, and learners. Recently, multimedia cases using the affordances of computers and Web technology have been introduced. However, these case approaches have rarely been applied for online learning. In this article, we introduce the basic components of online case-based learning and suggest three ways of using cases in instruction.

Interest in the use of cases, in different forms, has grown dramatically (Naumes & Naumes, 1999; Shulman, 1992). The uses of cases in instruction vary significantly. In the instructional design field, some refer to cases as coherent examples, real or contrived, that exemplify a concept (for example, Collins & Stevens, 1983; Gagne & Medsker, 1996; Merrill & Twitchell, 1994). In professional education, such as case-law and case-study medicine, a case epitomizes a specific "real-life" event in which multiple aspects are detailed and elaborated to make apparent the relationships among antecedent circumstances, the relevant "givens" associated with the

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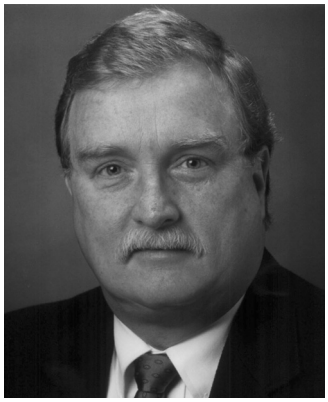

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situation, and eventual outcome(s) (Shulman, 1992). The specifics of the case, in effect, are used to provide a contextual organizer for representing and understanding the generalizable principles, relationships, and reasoning underlying a specific event.

With the advent of powerful technologies, both the number and type of case-based approaches have increased. Recently, variations in multimedia and Web-based cases have been studied (see, for example, Kinzer & Risko, 1998; Schrader et al., 2003). Cases have been used not only to epitomize a situation or represent authentic circumstances, but also as a lens through which thinking is facilitated. Some case-based approaches, for example, scaffold the reasoning processes associated with solving a problem in a given discipline, examining the absence or presence of key information in a real or simulated scenario, or modeling the reasoning processes of experts (The Cognition and Technology Group at Vanderbilt, 1990; Kolodner & Guzdial, 2000).

Clearly, technology-enhanced, case-based approaches take many forms, each with potentially important implications for design and use in online environments. This potential, however, has seldom been realized; case-based approaches are surprisingly rare in distance learning environments. To facilitate greater interest in and use of case-based learning, it is important to better understand the types, features, and design alternatives in their use. The purposes of this article are to introduce case-based learning, examine features of case-based online learning, and highlight potential for using cases in online learning

What are Cases?

Case-based approaches have been widely used in law and medicine education for more than a century to teach students how to solve complicated and ill-defined real-world problems (Naumes & Naumes, 1999). Case-based approaches have also been adopted by other professional education areas such as business, journalism, and teacher education (Knirk, 1991; Shulman, 1992). Despite the widespread use of cases in learning and the different roles cases play in diverse disciplines, no single definition of a "case" has been universally endorsed. Rather, cases are created and adopted according to differing contexts of and purpose for learning.

In traditional didactic instruction, cases frequently take the form of simple examples that allow students to *check* and *confirm* what they already know, typically using well-structured problems (Jonassen, 1997). However, in student-centered teaching and learning, cases are often used as tools to help students *reflect* on real-world problems and to foster critical thinking. Figure 1 represents the simplicity-complexity continuum of case applications. Simple cases, such as isolated examples, explicitly depict the basic information or concepts to be recognized or understood; as such, they provide a summative embodiment of the principles. As cases become more complex, ill-structured, and open-ended, however, they provide the means through which thinking is stimulated and learning is scaffolded. Rather than offering a "correct" single solution, authentic cases require that students think deeply about different variables, alternative theories, and a range of possible solutions.

Real-life cases portray "[a] piece of controllable reality, more vivid and contextual than a textbook discussion, yet more disciplined and manageable than observing and doing work in the world itself" (Shulman, 1992, p. xiv). In online learning contexts, which are often criticized for the lack of opportunities for authentic experience, case-based approaches featuring rich descriptions and situated problems may help to bridge the gap between the virtual and the real world (Jonassen & Hernandez-Serrano, 2002; Tippins, Koballa, & Payne, 2002). For example, problem-oriented math cases in the Jasper Series (e.g., What is the quickest way to rescue an eagle?[1]) are fundamentally different from the corresponding computational tasks posed in conventional math classrooms (e.g., If you divide 12 people into three groups, how many people are in a group?).

What are the Features of Online Case-based Learning?

Conventional case methods in education generally involve cases, study questions, case discussion, follow-up activities, and case analysis report (Wasserman, 1994; Will-

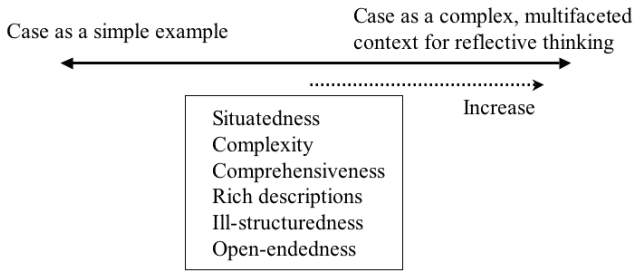

Figure 1. A continuum of case complexity.

iams, 1992); online case-based approaches share the same basic structures. In the following section, we elaborate other structures unique to case-based distance learning: case, case tools, case discussion, and learning resources.

Case

A case presents a narrative, story, and set of events (Shulman, 1992) that deliver critical and complex situations. As a narrative, a case has a plot—a beginning, middle, and end. A case is particular and specific, representing "the working of human hands, minds, motives, conceptions, needs, misconceptions, frustrations, jealousies, and faults" (Shulman, 1992, p. 21). Finally, a case represents the social and cultural contexts of the events.

Cases vary in format, length, and purpose. Case formats vary from raw data to case study papers such as diaries, personal letters, students' work samples, patient reports, white papers, and casebooks (Shulman, 1992; Tippins et al., 2002). Text-based cases, in the form of case study papers, have been used for a long time. For example, case books or case studies in journals have been used for business education and teacher education. Scenario-based video cases—acting as vignettes that capture important elements of situations—are often able to reflect the complexity of reality better than text form alone. Multimedia video cases, which have recently emerged, feature multiple data sources such as video, audio, graphics, and text allowing rich information of contexts.

The Case Technologies Enhancing Literacy Learning (CTELL) project (Schrader et al., 2003), for example, delivers Web-based cases that include rich multimedia information in categories such as Children, Class, and Interview per case (See Figure 2). For example, the

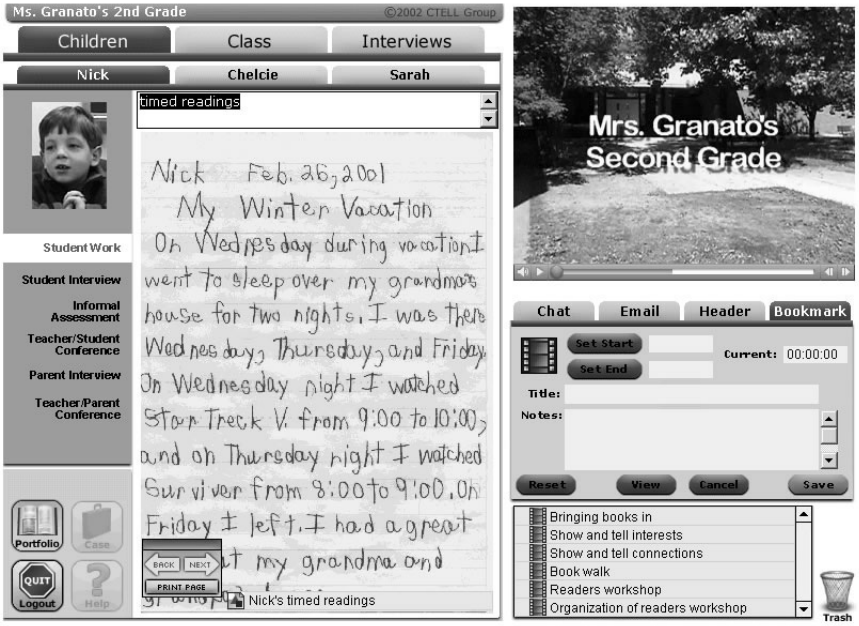

Figure 2. Multimedia cases: CTELL (retrieved from http://ctell.uconn.edu/screen_shots.cfm?PageNum_qScreen_shots=1).

Children tab includes detailed information for three children, such as sample work, interviews with students and parents, informal assessments, and teacher/student and teacher/parent conferences so that users can deeply understand the children. The Class tab presents a large picture of the classroom activity beyond the three children, including submenus (Background, Lessons, Lesson Materials, and Student Work). The Interview tab provides teachers or experts' commentaries on anchor videos, discussants' comments on various reading principles, and interviews with school personnel. Using these resources, CTELL learners can explore multiple forms of information along with multiple perspectives on literacy instruction.

The role of a case depends on the learning goals. Problem cases have been widely used in case-based instruction focusing on decision-making skills, morals, and ethics (Lynn, 1999; Shulman, 1992). Cases as experts' stories provide advice to guide novice students' practice. The length of case scenarios varies from a few minutes or single paragraph to a few hours or many pages; in some instances, business cases may exceed 30 pages in length (Blumenthal, 1991). Instructors decide the scope and length of cases based on the purpose of case-based instruction. Case development is not a simple task, as they contain critical concepts and incidents.

Case Tools

Cases can be represented and delivered in various ways. In the classroom, the instructor may hand out printed cases or show video cases in classrooms. In CTELL, tools are designed to effectively and efficiently collect, organize, and present cases. The Web and computer technology support a host of case tools that enable learners to readily access, use, and analyze cases. Web-based case tools generally include hypertext-enabled cases, search engines, supplementary information, and a communication tool. For example, InTime

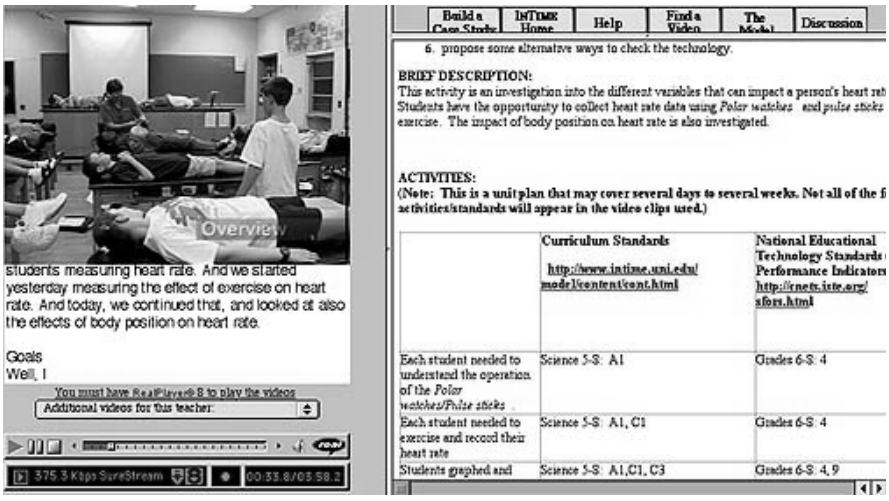

Figure 3. The Web-based video case tool, InTime (retrieved from http://ndwild.psych.und.nodak.edu/book/integ/summary/chap9.train.html).

provides 60 online video vignettes featuring PreK-12 teachers integrating technology into their classrooms (See Figure 3). Using various case tools and category searches (e.g., subject, grade, or software), students can locate tailored video cases, as well as access a specific video event or segment within a case.

Case Discussion

Case discussion is critical (Barnes, Christensen, & Hansen, 1994) in case-based analysis. Whereas reading or watching a case allows learners to gain situational knowledge, case discussion allows learners to increase their general problem-solving skills, reasoning, oral communication, and affective attitude (Masoner, 1988). Case discussion is perhaps the primary component application of cases in education. Several forms of discussion, such as Socratic dialog, small-group exchanges, and debriefing, can be used individually or in combination. Typically, study questions or discussion topics are used to stimulate analysis and processing after case presentation (Wasserman, 1994). Based on the questions and topics, students work individually or collaboratively to analyze cases and, finally, take part in a whole-group discussion or debriefing session (Ertmer & Russell, 1995). Whole-group discussion often involves teacher-led Socratic discussion. Instructor-led Socratic discussion is generally used to stimulate and facilitate students' thinking skills. The discussion facilitator "is planner, host, moderator, devil's advocate, fellow-student, and judge—a potentially confusing set of roles" (Barnes et al., 1994, p. 23).

Learning Resources

Learning resources are used both as primary materials to stimulate problem solving in case-based learning as well as supplementary materials appropriate for case analysis. During problem-based learning (PBL) in medical education, learning resources play an especially critical role (Williams, 1992). After receiving a case or problem, students engage in small-group tutorial sessions to identify problems, generate hypotheses, and decide a reading list. During self-directed learning sessions, students spend considerable time studying the identified case-relevant library resources. Students use combinations of published reference materials and consultations with resource faculty (e.g., basic-science faculty), along with a variety of case-relevant resources such as cadavers, specimens, x-rays, computerized scans, films, and videotapes (Williams, 1992). Like PBL in medical education, learning resources are most effective in learning environments that require self-directed learning, such as in distance learning rather than classroom contexts.

Recently, a number of interesting Web-based resources to support case-analysis in teacher education have been developed. The Secondary Teacher Education Project (STEP) at the University of Wisconsin at Madison (Derry & the STEP Team, 2002), for example, is a Web-based, case-based learning environment designed to help preservice teachers to design and develop learning environments based on a deep understanding of different learning theories. As illustrated in Figure 4, the STEP Knowledge Web (KWeb) is an online hypertext system designed to link learning science theories with research (Theories) using a library of video cases on actual classroom practices (Cases) relevant to the theories. Students use the learning resources, learning science theories, and discussion after reviewing real classroom cases. Learning resources allow the students to achieve a deeper understanding of complex teaching-learning situations and to focus on critical concepts within ill-structured cases.

How are Cases Used?

Case applications in instruction vary from conventional case methods to constructivist-inspired, case-based learning. Cost, purpose, topic, and learner may influence

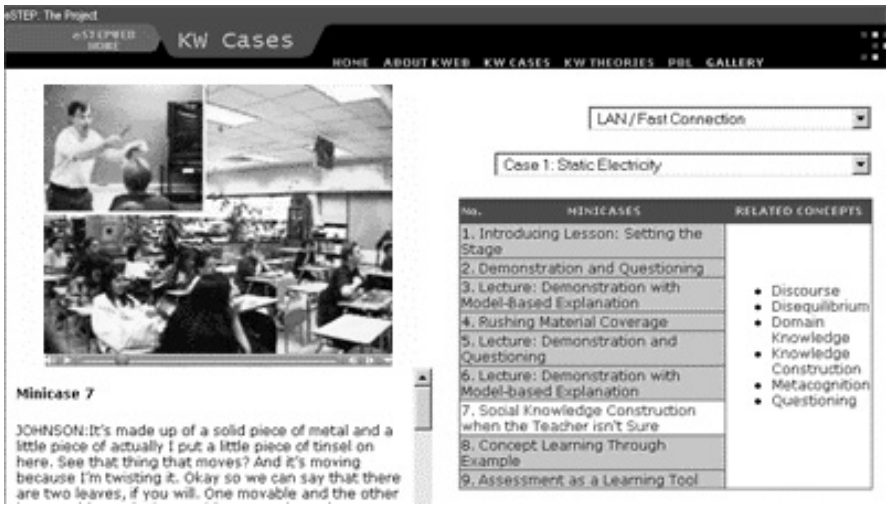

Figure 4. ESTEPWeb.org.cases (retreived from http://www.wcer.wisc.edu/estep/tour.asp?section=tour&page=cases).

which case method is used. The purposes defined for using cases guides the design and implementation of the pedagogical approach. For example, traditional methods mostly on case analysis and interpretation through discussion, and tend to be especially useful in learning complex concepts and principles within cases. Constructivist approaches, in contrast, stress active learning and "learning to learn"—critical analysis over the accumulation of specific knowledge. Consistent with situated cognition perspectives (i.e., authentic experience in authentic contexts, per Brown, Collins, & Duguid, 1989), some approaches have been used to facilitate active engagement of students in the actual settings of a case, though such approaches are relatively new.

As summarized in Table 1, we highlight three pedagogical approaches for case-based learning—case studies, case-based projects, and thinking engines. The three approaches are consistent with and to some extent share common structures of case-based learning. However, they differ in their purpose of using cases. While case studies are similar to traditional case methods, thinking engines are consistent with constructivist perspectives emphasizing active learning highlighting the role of cases in solving ill-structured problems or contexts for metacognitive thinking rather than depicting real situations.

Table 1
Case-based Approaches in Instruction

	Case Study	Case-based Project	Thinking Engine
What it is	Focuses on case analysis through case discussion and writing a report	Conducts relevant projects using ideas from cases	Solves ill-structured problems in designed situations
Main purpose	• Interpretation of situations in cases • Contextual understanding of concepts in cases	• Apply and practice learning through cases • Contextual understanding of concepts in cases	• Critical thinking • Problem solving ill-structured problems • Metacognitive skills
Role of cases	• Realistic situations that represent major concepts • Cases as problems or complete stories	• Experts' stories that represent their thinking and practices • Cases as complete stories and advice	• Ill-structured problem space • Cases as problems
Example	• Conventional case methods (Law, business, and teacher education) • COW (Bonk, Hara, Dennen, Malikowski, & Supplee, 2000)	• Web-enhanced case-based doing (CBD) (Kim, Hannafin, & Thomas, 2004)	Anchored instruction (The Cognitive and Technology Group at Vanderbilt, 1990)

Case study: Situational Understanding of Complex Concepts and Principles

Case studies have a long-standing tradition in professional schools such as law, business, and medicine. A case study focuses on case analysis for a deeper understanding of complicated concepts and principles. The topic of a case is critical because it usually embodies the core concepts and knowledge of a particular community in complex and uniquely situated ways. The purpose of case-study approaches is to acquire both the content knowledge and thinking skills of professionals by pointing out critical concepts, events, and principles within cases. The focus of a case study varies in different disciplines. Medical and law schools, for example, share a similar approach to using cases, focusing on principles underlying expert analysis or actions in specific precedent-setting instances (cases). Case methods in business schools and teacher education programs, in contrast to expertise and precedents, focus more on open-ended problems and solutions to develop broader understanding and multiple perspectives in the real world (Tippins et al., 2002).

During a case study, students typically read or observe given cases, analyze the cases individually and in small groups, and participate in whole-group discussions during debrief sessions (Wasserman, 1994). For example, in law school applications, students prepare a brief before class by summarizing and analyzing law cases. During class, and based on the brief, professor-led and large-group discussions are conducted using Socratic questioning method, and additional relevant cases are introduced (Tippins et al., 2002; Williams, 1992).

For online learning, organizing discussions is critical to effective case-based approaches. Conferencing on the Web (COW) (Bonk et al., 2000) was designed to promote asynchronous case discussion for preservice teachers in a case-based online learning environment. Each case, developed by students to document their field experience, consists of a case commentary, case questions, and case discussion board. Students posted their opinions on cases to foster discussion and debate; the archive of case discussions is stored as a knowledge repository. According to Bonk et al. (2000), COW fostered student learning and engagement and, moreover, strengthened the community of practice among preservice teachers, teacher educators, and teachers who supervise field experiences. The COW community has since expanded to include students and instructors from other countries.

The purpose of the case-study approaches is consistent with professional education: "A professional education curriculum both seeks to deliver a codified theoretically based knowledge base and intends to teach reasoning skills and strategies for analyzing and acting professionally" (Merseth, 1996, p. 724). Thus, through case study, students gain both content knowledge and procedural knowledge. Content knowledge involves understanding broad repertoires of context and multiple perspectives; procedural knowledge focuses on reasoning processes including judicial, clinical, or pedagogical reasoning. In addition, students can achieve self-directed learning and reflection skills through analyzing and discussing cases.

Case-based Project: Experiencing and Practicing through Experts' Cases

While case study approaches generally provide only vicarious experience (Putnam & Borko, 2000) and rely on Socratic discussion and case analysis, case-based projects combine a case study approach and project-based learning. From a situated cognition perspective, experience is provided through authentic activities (Brown, Collins, & Duguid, 1989); active learning beyond discussion may enhance students' knowledge including the integration of concepts, culture, and situations. When students review and analyze experts' cases, they observe critical thinking and know-how, the application of knowledge and principles in context, and the enactment of expert analysis and decision making in real-life settings. In case-based projects, therefore, students practice and apply critical concepts and ideas manifested in the cases. Students are assigned to project tasks, such as designing lessons, practicing teaching, or developing business plans. Novices, in effect, experience or re-enact real-world problems, applying critical thinking, conceptual knowledge, and decision making in the process.

The Web-enhanced case-based doing (CBD) environment was designed to enable preservice teachers to practice designing technology-enhanced lessons and implementing them prior to their student teaching experience (Kim, Hannafin, & Thomas, 2004). The case learning of preservice teachers involves scenario writing, observing and studying expert teachers' cases, discussing and reporting case analyses, planning, and doing authentic activities, including developing technology-enhanced lesson plan and course materials, microteaching, and reflecting. As shown in Figure 5, the case-based doing tool (CBDT) consists of a case library and four templates that include guiding questions for each phase of the course project.

The four templates represent four procedures of case-based doing (CBD) activities. The first step, *What's the story*, provides tem-

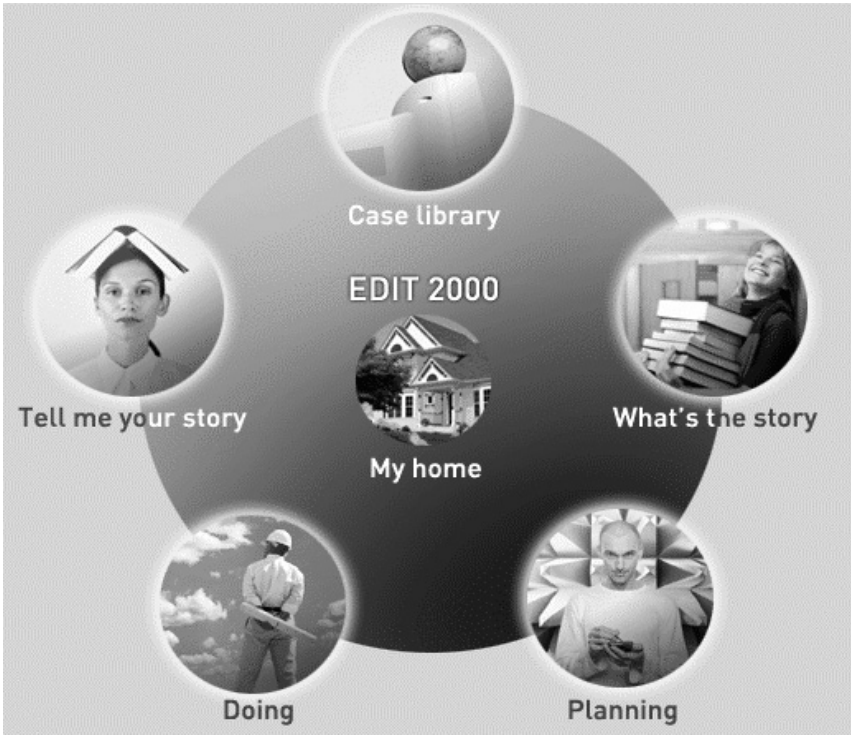

Figure 5. The screen shot of the Web-based case-based doing tool (CBDT) (Kim et al., 2004)

plates for case analysis, consisting of learning goal, instructional strategy, the benefits of technology, and lesson(s). After whole-group case discussion in class, preservice teachers write the case report in CBDT. The second step, *Planning*, helps preservice teachers plan their lessons including course material development using case ideas. Because the focus is on preservice teachers' integration of technology into their lessons, guiding questions such as ideas from the case, knowledge of students, and benefits of technology directly support the format of the lesson plan used. In the next step, *Doing*, students develop their technology-enhanced lessons and course materials. This step aims to help students reflect in action through describing unexpected issues and identifying resources along with free-style journaling. The last step, *Tell me your story*, is related to reflection. Moreover, this step aims to help students build their own stories or cases as mental case libraries so that they can use them for relevant future tasks. Conclusions to individual scenarios, process briefs, lesson(s) learned, and technology notes are provided as guiding questions. Preservice teachers write their story after completing their course project. Through case-based doing (CBD) activities, preservice teachers learn from both expert teachers' thinking and approaches in the cases provided and from application in their own course project.

Learning by doing with cases allows students to experience "professional-like" projects represented through experts' cases in order to integrate experts' perception, knowledge, and skills with their own. Learning by doing with cases allows students to practice in safe environments before engaging in real experiences in high risk, high-stress, and high-cost situations.

Thinking Engine: Critical Thinking for Problem Solving

While cases in case studies represent real situations that epitomize central concepts and situations of a particular community, cases as thinking engines assume the role of a tool to facilitate thinking skills for problem solving. The topic of cases is designed to stimulate and scaffold the reasoning processes of students, but the content of a given case is thoughtfully designed or engineered rather than selected from real situations.

Anchored instruction (CTGV, 1990) typically uses case scenarios as a kind of thinking engine. The learning goal of anchored instruction is to help students detect as well as solve problems; in the process, students develop unique perceptions, understandings, and solutions rather than adopting those of an expert. The Jasper Woodbury Series is the best-known design example of anchored instruction. The Jasper series is primarily designed for mathematical problem formation and problem solving and also includes the development of applications of science, history, and literature concepts. Complex mathematical problems are embedded in the video story. A videodisc format also allows veridical representation, random access, and compression of time for representing a certain case or problem. While using videodisc, students *generate* (or find) problems and *solve* them by using embedded data in the videodisc.

While case study often focuses on Socratic discussion the instructor leads, the approach of using a case as a thinking engine empowers students' ownership of problem solving. The students identify problems and solve them (CTGV, 1990). Facilitation focuses not on knowledge-driven processes but on metacogni-

tive processes (Savery & Duffy, 1995)

Assessment Issues: How do we Know when Case-based Approaches Work?

Like all online teaching and learning, assessment issues associated with online case-based approaches are important. The questions and issues are simple, but the answers are not; the need is compelling, but the means are elusive. There are no simple answers, only simple questions.

The focus of assessment varies according to the goals for use and the intent of the evaluation—logistical, technical, pedagogical, administrative, and so on. In the remainder of this section, we emphasize student-centered indicators and assessment methods associated with case-based approaches. While we cannot provide detailed guidelines, we identify student assessment issues of greatest relevance to online, case-based approaches.

Perhaps the most central of all assessment issues pertains to student goals—more specifically, to the focus of the case-based learning environment. Traditionally, assessment has tended to measure student content or domain achievement per course syllabi or instructional objectives. Case approaches tend to reinforce such objectives, often in the form of examples that reify the target learning outcomes or the provision of classic "landmark" cases. This type of knowledge has been described as "cognitive residue;" that is, the measurable impact of learning from technology. Likewise, a host of indicators are used to examine the influence of case-based approaches on students' attitudes, beliefs, and motivation in a given domain of study. For the most part, the goals of the case-based learning environment mirror those of other approaches, so assessment needs are generally well-served by using traditionally aligned assessment items, questionnaires, and performance tasks.

As noted previously, however, the focus and purpose of online systems have changed considerably; likewise, the focus of case applications varies. Some goals emphasize reasoning processes over domain content, and "knowing why and knowing how" over "knowing that"; others aim to promote deep conceptual change in understanding. Such goals require different perspectives about, and approaches to, assessment. Several factors, often overlooked or undervalued, assume greater significance in both design and assessment. For example, greater focus is placed on the student's ability to explain, predict, and warrant knowledge claims rather than simply state them (or obtain a score on a given test). Assessment, in such instances, might focus on the ability to analyze a position and rate the quality of warranting evidence and the ability to support positions to which one adheres (or perhaps, a position one does not share).

Evidence in online, constructivist case approaches typically shift from student responses to supplied questions and test items to original, student-generated products. Portfolios, for example, can be used to both benchmark one's reasoning in a given area as well as to provide baseline evidence needed to examine cognitive and metacognitive growth over time or to demonstrate conceptual understanding from multiple perspectives. The key consideration remains one of aligning assessment methods with the goals and objectives of instruction; shifts in the nature of the goals and objectives, however, require corresponding shifts in both the focus and methods of assessment.

Conclusion

A number of online tools and communication technologies have been developed; however, pedagogical ideas on how to use them are often overlooked (Bonk & Dennen, 2003).

Case-based approaches can be a promising pedagogy for online learning. Using cases for education can provide a variety of pedagogical ways, although currently most case-based instruction relies on Socratic case discussions. That is, case-based project and using cases as a thinking engine are still new. Specifically, these pedagogical ideas need to be more developed and refined for online case-based learning concerning integration of Web technology, communication at distance, and the characteristics of cases.

Note

1. This problem and video vignette can be found at http://peabody.vanderbilt.edu/projects/funded/jasper/preview/RBMPreview.html

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Aligning e-Learning with Strategic Plans

Ryan Watkins

Ideally, strategic plans provide practical guides for decision making. For employees at all levels of any organization, the strategic plan should offer guidance and support for making personnel, acquisitions, and other decisions that are critical to the organization's accomplishments of goals and objectives. Yet, as most of us have witnessed, these planning documents are typically created every few years only to sit on the shelf.

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And while these potentially valuable documents gather dust, employees are increasingly being relied on to make critical decisions, often without clear guidance or direction based on the strategic directions of the organization and its clients.

This seems to me to be far from the most effective way to provide useful leadership to those individuals throughout an organization that are making increasing difficult decisions. From decisions regarding which products to recommend to potential clients to questions regarding the most effective delivery tools for training, all decisions in an organization should be aligned—either formally or informally—with the organization's vision and mission.

For instructional designers, trainers, online instructors, and others involved with improving the performance in individuals, aligning the strategic plans of their organization with the results they contribute through effective instruction is especially important for achieving success. After all, success of instruction is dependent on it meeting an array of objectives representing the goals of multiple internal and external partners, stakeholders, clients, and clients' clients; ensuring that instructional interventions will meet these broad requirements for success is among the responsibilities of instructional designers.

The diversity of criteria for determining the success of a training or education program is part of the reason that it is especially critical for those involved in classroom or distance education to be familiar with the strategic directions established for the organization. The odds of successfully meeting these multiple standards for success are nearly zero if you are not even familiar with an organization's vision for the future.

Consequently, the strategic direction established by the organization (i.e., the objectives to be accomplished by and through the organization, including strategic plans, missions, goals, objectives, etc.) provide indispensable input for the design of online or classroom instruction. Moving forward with instructional design steps (i.e., needs analysis, task analysis, media selection, objectives development, instructional strategies design, formative evaluation, etc.) without a clear analysis of how the instructional intervention is linked and

aligned with the strategic objectives of the organization, can be costly when instruction fails to meet the requirements of various stakeholders.

For example, it is not uncommon for training departments to take a "Band-Aid" approach to the development of new course offerings. When a manager from another division identifies a "need" (e.g., "We need to have a course on XYZ management principles"), too frequently the training department's response is to quickly create a new course curriculum that can be pilot-tested and launched within a matter of weeks. Often, this is done without anyone questioning either the performance problems that led to the stated "need" or the alignment of the new training curriculum with the strategic direction set for the organization. As a result, organizations regularly end up expending valuable resources on developing training that has limited applicability as the organization moves forward in achieving its objectives.

Strategic plans can be most valuable to organizations when they outline the results that are to be accomplished (e.g., zero deaths or injuries from our products, 35% increase in production output, learners demonstrating success on all instructional objectives), rather than the processes and resources that may be used to achieve organizational goals (e.g., using quality management we will reduce waste). Results-oriented strategic plans can thereby focus all decision making within the organization on the achievement of measurable accomplishments, thereby allowing employees throughout the organization to align their daily decisions with the measurable standards related to the organization's performance objectives.

Now and again, strategic planning has been criticized as being irrelevant in the ever-changing environments of today's businesses and educational institutions, although the opposite is actually true for strategic plans that offer guidance for decision makers throughout the organization. Strategic plans that provide a clear picture of the useful results to be achieved through the organization, without micromanaging the daily decision making that is essential to functional organizations, are still effective tools for aligning the performance of people with results that add value. And, as organizations become more fluid in their decision-making at all levels, it is progressively more critical that all employees (including instructional designers, online instructors, media developers, classroom instructors, and others) have the necessary and appropriate guidance for their daily decision.

So, before you develop your next training course or consider adding a new online course to your curriculum, take a few minutes to review the strategic directions of your organization and it partners. Using annual reports, vision statements, missions, and strategic plans to align your decisions with the strategic directions of your organization is a first step toward ensuring the success of any project. And, you may find yourself approaching performance problems (i.e., the impetus for many training or education solutions) with a new set of questions—questions that link your decisions with the strategic direction of the organization.

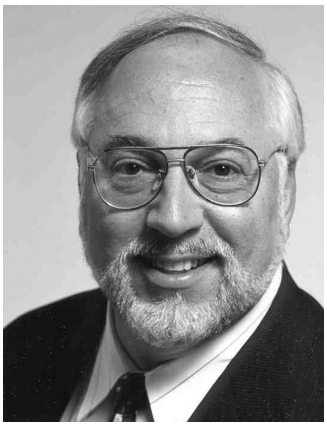
"SO, BEFORE YOU DEVELOP YOUR NEXT TRAINING COURSE OR CONSIDER ADDING A NEW ONLINE COURSE TO YOUR CURRICULUM, TAKE A FEW MINUTES TO REVIEW THE STRATEGIC DIRECTION OF YOUR ORGANIZATION."

The Point of Convergence

Jonathon Levy

Everyone recognizes that a functional convergence is taking place in the field of learning. The new model is emerging, characterized by the fusion of media, platforms, knowledge sources, delivery modalities, and learning philosophies. The boundaries between "information" and "knowledge" are dissolving as the principal driver of the learning experience inexorably shifts from content to context, from preceptor to learner.

But the question lingers: why is this convergence happening now, where is it going, and how can we recognize the winning strategies that will take advantage of that current of change? Is there an action plan that will enable us, in the words of Wayne Gretzky, "to skate to where the puck will be?"



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I believe there is. The title of this column, "The Point of Convergence," is a double entendre that defines both the *intersection*—the point—of confluent learning technologies and strategies, as well as the *reason*—the point—for that convergence. There is a model for this evolutionary movement that is both predictable and inevitable, a relentless natural phenomenon that is paving the way for not only a revolution in the way we learn, but also for a very practical and sustainable model of collaboration between universities and businesses.

Perhaps it is ill-advised to paint this phenomenon as a revolution. After all, the most important "revolutions" of history are in reality just different stages of human evolution, each based on increasing leverage: the application of creative intelligence to do less and accomplish more.

For example, in the first revolution—the Agricultural Revolution—we used the principle of leverage to develop tools to expand our strength. In the second revolution—the Industrial Revolution—we discovered subtler laws of nature that transformed tools into more powerful machines to expand our reach. The third revolution, the so-called knowledge-based society, flows from the use of still subtler and more powerful laws of nature that transform electrical machines into "digital machines" (computers, databases) that expand the amount of knowledge available to the human mind.

The next "revolution" after that is simply a continuation of the same natural evolutionary trend. Thus, while the third revolution increased the amount of knowledge available for the mind, the fourth revolution is increasing the ability of the mind to filter, sort, and use that knowledge in a targeted and context-sensitive way.

The driving force behind this development—one that some are already labeling a new paradigm in learning—is the latest iteration in the development of the network. The earliest networks were built for both commerce and communication. They were the network of primitive roads that connected ancient settlements and villages, the only pathways for knowledge and information exchange. We have come some distance since those early times. Today we can achieve instant communication with anyone anywhere, at any time. Increasingly, we are developing the ability to have any bit of

knowledge available instantly, to share and refine our understanding with others, also instantly, and to capture the inherent knowledge of colleagues effortlessly. For the first time in human history we are transcending the boundaries of time and space. A more cosmic view of our increased capacity to communicate with one another may be understood in terms of linking individual awareness with a more global consciousness, a process whose defining characteristic is the enlivening of the qualities of "unity" within the field of diversity. At each stage, stronger and more robust networks of communication generate greater unity of awareness, and greater awareness of unity.

Interestingly, while the emergence of unity within diversity is the very essence of the concept of "uni-versity" and might seem to be academic in nature, at the same time it provides one of the most important elements in creating competitive advantage in our businesses and industries. While much of this may sound metaphysical, it serves the very practical purpose of connecting outside knowledge from a university and individuals who possess inherent knowledge within a business organization with those who require either or both at the moment of need. In a time when knowledge drives competitiveness, there is significant economic advantage to be gained from convergence. While education has in general lagged far behind business in the application of these new principles, the new realities have now begun to gain the attention of leaders in the field of education, a field largely unchanged for hundreds of years.

The boundaries of time and space, and the boundaries between "the town" and "gown" are now giving way to a new hybrid educational phenomenon, enabled by new and robust communications technologies and networks. Edward O. Wilson in *Consilience: The Unity of Knowledge,* argues that science is beginning to piece together one "consilient" or interconnected picture of nature "that includes everything from dead atoms to warm, living flesh." In the field of learning, that time has come. Those who recognize this phenomenon have the ability to create strategies that take advantage of this tectonic movement.

Everywhere in our environment historical boundaries are dissolving. Home, work, school—a few years ago each was separate and distinct, with its own set of realities. Elements of each are now found in the others: we take our children to daycare at work and we engage in formal learning at work. We take our work with us on laptops when we travel, and we log in at home to continue the process. Similarly, we can find a blurring of the boundaries between these previously distinct areas of life.

- **Knowledge and information:** Traditional publishing, the enterprise, the Internet, and traditional and for-profit universities—the boundaries between the different areas of knowledge and information are dissolving into the business of "give me the content I need based on what I already know and what I need to know."

- **Technology convergence:** Video, telecommunications, computing, learning management systems, and resource management software—the boundaries between the different areas of technology are dissolving into the business of "push it to me now, seamlessly."

- **Pedagogical convergence:** Mediated/ simulated, synchronous/ asynchronous, traditional students/fully-employed "students, and on-campus/off-campus: the boundaries between the different elements of a preceptor-driven learning model are dissolving into the business of "give me the content I need, the way I want it, in the context of the moment (and then go away)."

In each of these models, the emphasis is shifting from the supplier-driven to the consumer-driven model: increasingly it is about the learner rather than the teacher. The roles of both are shifting, and when properly understood both will be ennobled. This is about a win-win scenario, and there are plenty of emerging examples of both teacher and student being empowered within the new educational milieu.

The Point of Convergence may be seen ultimately as not just the empowerment of the consumer of knowledge, but in a very practical sense as a strategic blueprint for a new and symbiotic relationship between the academy and the world of business. With recognition of the changing tides of knowledge acquisition, educators may learn to provide business with intellectual capital in the form that business needs for flexibility while in return business will provide education with the degree of financial capital that the academy requires for stability. In the process, the academy will be forced to come to grips with its own technological indolence, and will conquer it.

It is a sustainable model worthy of consideration.

Ubiquitous Computing, Ubiquitous Inattention

Craig Ullman

When computer engineers draw schematics, they always represent the Internet as a cloud. The origins of this iconography are pretty simple: the Internet is a distributed network, so if you want to send data from point A to point B, the data gets broken into bits (so to speak), and the individual packets are sent any which way, to be gathered up and re-assembled at point B. So you enter the Internet Cloud at one point, you come out of it at another point, but how you got there is totally obscured.

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Over the years, the Internet Cloud has enveloped the surface of the Earth with wires. You had to plug in, get connected, be in a place where you can connect. You had to go to the Cloud, but now the Cloud comes to you: wireless technology is becoming ubiquitous. Coffee chains and fast food outlets, public buildings and private homes, are all unplugging and connecting to the Internet Cloud via several different wireless formats (Wi-Fi, Bluetooth, etc.). The different formats ultimately do not matter; no doubt they will be replaced as even more robust technologies reach the market. The point is, we will soon be living our lives subsumed by the Cloud.

For educators, the Cloud already is looming over the horizon. Duke University recently announced that all incoming freshmen would be given Apple iPods so they can wirelessly download course materials, multimedia, school information ("What's for lunch at the caf today?") and so on. At first glance, one might be surprised by the naiveté of the university administration: how could they imagine the mostly bourgeois students of Duke don't already have iPods? But there's certainly a value in standardization, and I'm sure they've got a plan for the kids who already have one.

The convenience of wireless communication with the student body is certainly appealing: the students can take the university with them. But there's a catch to this: how can the administration, and more importantly, how can the professors, question a student using an iPod in the classroom? And exactly what is that student doing? Checking her class notes? Looking up a movie schedule? Downloading music? And every other student in that class will have the same iPod, and no doubt will have a similar important reason to refer to his or her iPod just when the professor once again explains the structure of a circular argument.

So let's get back to point A. The Internet Cloud will, in only a few years, envelope every last corner of the Earth. There will be no physical location on the planet (except, perhaps, under water), where you won't *already* be online. So your mind will always occupy (and be occupied by) two separate and independent metaphysical spaces —the actual and the virtual.

Of course, you will argue that people will just put their iPods away. But what about your camera-video recorder-watch-text message-multimedia Web browser-cell phone which will also be connected? How could anyone leave home without it?

Our students, the information pioneers of our society, will be more and more likely to spend their time in a space that they can shape, where their input has affects, where what they think matters.

Have I described your classroom to you?

USDLA 2004 Awards of Distinction

John G. Flores

One of the most satisfying things our association does each year is to formally recognize certain individuals for their contributions to the distance learning community.

Because so many participate directly in it, probably more of our membership is familiar with the annual "best of" competition for distance learning programmers. Once again this year, that competition was fiercely competitive and set a new benchmark of excellence. Well done. My congratulations to the winners—and really to *all* of the participants—and to Don Lake, USDLA Award Chair and his team for staging a truly stellar event.

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In this column, though, I want to focus not on the competition but on the individual awards of distinction. There are two categories: The Eagle Award and the USDLA Hall of Fame.

The Eagle Award recognizes an individual in public life whose work has promoted distance learning as an educational solution. This is the 13th year for the award. This year's recipient is the **Honorable Robert F. Bennett**, U.S. Senator from Utah. Senator Bennett is no doubt that chamber's leading proponent of technology—and especially so in applying it to educational needs. He deserves our profound thanks for his effort.

The USDLA Hall of Fame recognizes a broad spectrum of individuals who have made noteworthy contributions to the development of distance learning. This year, six individuals received that distinction. **Dr. A. Frank Mayadas** had a distinguished career in research with IBM before moving to the Sloan Foundation and founding their Asynchronous Learning Network. **Mr. Fred Poker** has worked internationally in distance learning for 2 decades and now advises key Federal agencies in that area. **Dr. Mary Beth Susman** was the founding CEO of Kentucky Virtual University, former Executive Director of the widely acclaimed Colorado Community Colleges Online and now Director of Education Services for Rocky Mountain PBS in Denver. **Dr. Jack M. Wilson** is a well-known entrepreneur and distance educator, cofounder of LearnLinc Corporation (now Mentergy), was the founding CEO of UMassOnline, and now serves as president of the University of Massachusetts statewide system.

These people are all giants in the field of distance learning. They richly deserve this recognition by their colleagues. I want to make special note, though, of two other inductees to the Hall of Fame: **Glenn R. Jones** and **James E. Vautrot**. Both are true pioneers in our industry. Glenn Jones is chancellor of Jones International University, which he founded as the first university to be wholly online and fully accredited. Jim Vautrot, as president and CEO of BAF Satellite & Technology has consistently (and successfully!) pushed the technical envelope and thereby extended the

reach of distance learning as a viable option within the industry.

If these men had done no more, they would, indeed, be worthy candidates. Yet they distinguished themselves not only by accomplishment but also by *commitment*. Both are great friends of USDLA.

Years ago, Glenn Jones had a vision that one day it would be important to have acknowledged standards of excellence in distance learning. Typical of him, he acted on that belief and has been a supporter of our association in accreditation and credentialing. Likewise, Jim Vautrot has given us tremendous logistical support in developing standards. Jim, in fact, was also a key figure some time ago in shepherding and financially supporting the association through its reorganization.

I salute all of the recipients for having enriched our distance learning community through their hard work and service.

Benefits of Collectively Navigating the Waters of Distance Learning

Marci Powell

It was a scorching hot Texas day on the San Marcos River as our group plunged into the water. Typically on a canoe trip, it takes awhile before someone accidentally flips over but that day was different. The devastating flood from just weeks before caused an extremely swift current. Six of our 10 canoes capsized upon entry into the treacherous waters. Once recovered, it was immediately decided that our most experienced would become a point man to lead the way.

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The flood waters that had risen 40 feet above flood stages were now near level; but still, it was quite eerie to see uprooted trees and debris lodged sideways in tree tops high above the river. As we navigated the rapids and newly-formed dams caused by downed trees, we took comfort in knowing our point man was guiding us safely by looking ahead.

One of the greatest benefits of navigating through a changing environment as a group is tapping the resources and strengths from within. Our canoeing entourage overcame rough waters successfully by finding expertise from within. As distance learning professionals, we understand that our environment is changing. We find ourselves facing many challenges. We look to others who have navigated the waters ahead of us to guide the way. We find success when tapping into the resources and strengths of our collective experience. Our national and state distance learning associations provide a gathering place of expertise—a pool of experience. Networking among professionals is truly one of the greatest benefits derived from being part of our groups. However, benefits of being a member of USDLA and its subsidiaries runs much deeper.

The USDLA continuously defines additional value-added services to chapters and to all individual USDLA members. As an association of associations, USDLA has two primary goals: to assist in the building of strong local and state chapters and to expand national services in order to increase the value of individual USDLA membership.

Not only is there a powerful network among distance learning practitioners, but a powerful network exists of business and industry leaders. Since its inception in 1987, USDLA membership has included educators and trainers as well as technology vendors in the interest of promoting distance learning applications and technology. USDLA has created and sponsored the forums, trade shows, conferences, and other events that have fostered many educational and cor-

porate alliances that have driven the quantum advances in distance learning and telemedicine. Vendors have often chosen USDLA-sponsored events as the forum for new product introduction and launches. USDLA can help practitioners in contacting multiple vendors of a specific technology and more importantly, can reference institutions and programs that are users of a specific technology.

Valuable information on distance learning is provided through electronic newsletters, the USDLA website, this magazine, other magazine articles such as our *Newsweek* column. Likewise, these forums provide opportunity for chapters and members to present information. Links directly to chapter Websites allow prospective members who are searching the Web for information regarding distance learning to be linked to the nearest chapter. Current research and statistics relevant to the field and its growing number of practitioners is available, as well as information on scheduled meetings, conferences, major industry events, and other special events.

In addition to conferences—including the VNU Training & Online Learning, International Forum for Women in E-learning, and Nova Southeastern University/ Fischler School Annual Conference, USDLA has worked closely in the past with ICDE, International. USDLA executives have consulted with numerous distance learning officials in Europe, Asia, Africa, and South America. There is interest on the part of many countries to form local chapters of the USDLA. As these international chapters become a reality, the national organization will become the members' link to the worldwide market.

The USDLA continues its program of national awards and recognition to individuals, institutions, agencies and companies with outstanding achievements and contributions in the field of distance learning.

Chapters and affiliates of USDLA are entitled to legal information obtained from the specialized law firm retained by USDLA. A major benefit of USDLA membership is the connection to a non-profit organization. Chapters are given guidance to establish and maintain their own nonprofit status with respect to IRS filing and submission of annual forms.

The USDLA is looked upon by Congress as the authoritative voice that speaks on behalf of the distance learning constituency. Whether it is the 1996 Telecommunications Act or any others, the USDLA is called on to represent its diverse membership. The USDLA has often been called on to give congressional testimony. Several chapters have their own public policy committees while also serving on the national committee.

The list could go on and will continue to expand as we grow. We are here to address the needs of our members. Like the ever-changing distance learning environment in which we live, it is our desire to work as a group to navigate the rough waters. USDLA serves as the point man leading the way. Addressing the needs of our members is of great importance to us. We encourage members to share their needs and desires with us. Each month there is a regularly scheduled audio conference among chapter presidents, the USDLA Executive Committee, and the USDLA administration. This forum ensures that chapter issues and concerns are discussed and dealt with on a national level.

I encourage you to make sure your needs are being expressed nationally either directly to headquarters or through your chapter. A point man is not efficient if he is not serving the good of the whole. USDLA can only accomplish its two primary goals: to assist in the building of strong local and state chapters and to expand national services in order to increase the value of individual USDLA membership, if we keep the communication lines open and know your needs. As we navigate the waters of distance learning, help us continue to meet your needs making our overall association beneficial for all.

"The USDLA is looked upon by Congress as the authoritative voice that speaks on behalf of the distance learning contituency."

Introducing the Canadian Association for Distance Education

Bill Muirhead

As President of the Canadian Association for Distance Education (CADE), I am very excited to introduce USDLA readers to CADE and to explore together some of the opportunities and challenges facing distance educators. I welcome readers' feedback and look forward to facilitating this conversation between CADE and USDLA members.

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Introducing CADE

CADE is a national voice for innovators in learning. The organization was established in 1984 by a group of dedicated distance educators who saw the potential benefits of working collaboratively to support research while building an organization that could build capacity and support a community of practice. The goal of CADE is to embrace a pan-Canadian vision including members from our two official linguistic communities, both urban and rural members, and a broad mix of educators from diverse sectors. CADE's membership includes university, college and K-12 educators as well as representatives from government, the private sector, and the international community. Increasingly, the diversity of CADE members reflects the changing landscape of the field of distance education nationally and globally.

CADE's *Journal of Distance Education*

CADE members have repeatedly stated that the refereed *Journal of Distance Education* is a highly valued publication. Published twice annually, the journal has chronicled the growth of e-learning within the field of distance education and increased readers' knowledge of new research and emerging trends. The journal is now available on the CADE Website as well as in a paper format.

CADE's Annual Conference and Networking Event

CADE hosts an annual conference every spring at a different location across Canada. The event attracts CADE members along with an increasing number of international delegates. The theme of the 2004 conference, "Pioneers in a New Age," was evident in the numerous presentations that focused on the changing landscape of distance education as more and more edu-

cators embrace practices first pioneered in distance environments. In networking sessions, members described themselves as pioneers in a "familiar but different" world where concepts related to online technologies and distance education continue to evolve. As one recent participant noted in her evaluation "the sessions were fabulous—well presented" while another commented on the quality and applicability of the sessions within the conference program.

CADE Professional Development Activities

CADE has undertaken a creative professional development program including "Wise and Witty Wednesday" teleconferences held on a monthly basis. The teleconferences average 2 hours and feature guest speakers from across the distance education spectrum. The teleconferences, linking sites across North America, provide members with an opportunity to hear from leaders in the field as they tackle the day-to-day issues common to many of us.

CADE Virtual Vendor Sessions

A second innovative professional development program, "Virtual Vendor Sessions," has proven to be very popular. Offered as monthly teleconferences, the sessions provide participants with an opportunity to learn from vendors about new products and/or services. Recent sessions have focused on emerging learning management systems, new Internet-based collaborative software, and conferencing software solutions. For additional information, visit our Website at http://www.cade-aced.ca/

CADE is committed to addressing the needs of Canadian distance educators. Increasingly, the organization is focused on establishing synergistic partnerships and working collaboratively to build capacity within the field of distance education. CADE Board members seek new opportunities to work with USDLA on common goals and strategic directions. An initial "first step" resulted in the exchange of membership privileges among selected board members, and dialogue continues on possible next steps. The CADE Conference organizing committee is now working with USDLA executive members to plan sessions to be offered at the 2005 conference to be held in Vancouver, British Columbia (May 8-11).

In closing, I welcome readers' feedback on these initial comments and I look forward to your thoughts on how to build synergies between CADE and USDLA in the future.

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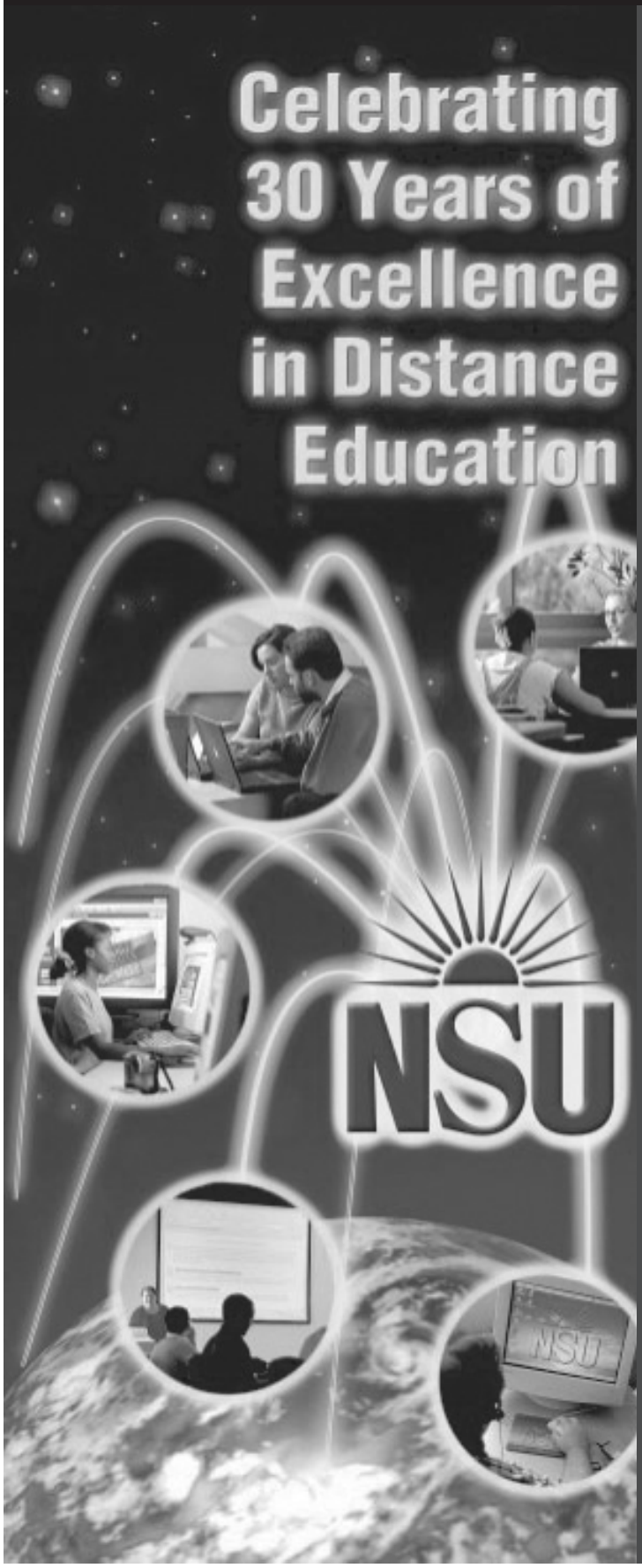

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Instructor Competencies: Standards for Face-to-Face, Online, and Blended Settings

(Revised 3rd Edition)

(Published in cooperation with the Association for Educational Communications and Technology and the International Board of Standards for Training, Performance and Instruction)

By **James D. Klein,** *Arizona State University,*
J. Michael Spector, *Florida State University,*
Barbara Grabowski, *Pennsylvania State University,* and **Ileana de la Teja,** *LICEF Research Center, Tele-universite*

This edition is not just a rehash of old, albeit classic and still important, stuff. Instead, it provides a fresh perspective on a topic of perennial interest for those working in the field that has been variously called training and development, human resource development, performance technology, and workplace learning and performance. The fresh perspective takes into consideration two additional instructor settings to the traditional face-to-face environments that most instructors and trainers know -- that is, online and blended settings. These settings are, of course, becoming more critical as instruction moves beyond classroom settings to include virtual and combinations of classroom and other media delivery methods.

The ibstpi instructor competencies match up well to *Mapping the Future* (Bernthal, Colteryahn, Davis, Naughton, Rothwell, & Wellins 2004), the current ASTD competency study of the field now known as Workplace Learning and Performance (WLP) and previously known as Training and Development (T&D). WLP is more than a new name for an old subject and represents a fundamental paradigm shift in what it means to be a professional in the field formerly known as training. WLP is all about getting improved performance -- and therefore improved results -- in organizational settings through planned and unplanned learning interventions. Instruction is thus a means to an end and not an end in itself. The ibstpi instructor competencies dovetail well with that philosophy.

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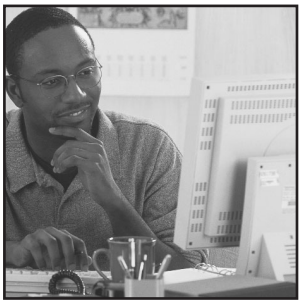

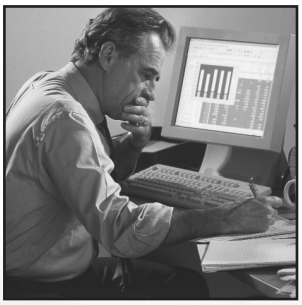

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Bringing life to learning

Distance Education, Not Different Education

Michael Simonson

One sign that distance education is growing in importance is the increasing number of professional associations that are exploring ways to improve service to their members by offering events and education at a distance. One large biomedical organization recently hired a consulting and marketing firm to interview distance educators to determine how they could "get into the distance learning game," and I was interviewed.

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Interview questions ranged from the obvious to the unique. The interviewers wanted to know about effective techniques for course design, the barriers to effective practice, and names of leading distance education organizations.

They really wanted to know what was different about distance education—different needs, different approaches, different designs, different technologies, different problems, even different solutions. Some of their questions were easy to answer, at least in a general sense. Readers of *Distance Learning* magazine probably have been asked questions like these dozens of times. Other questions were more difficult, and their quest to find differences began to become a problem.

The interview questions also were specific, focusing on vendors and providers. They wanted a "top 10" list of vendors. I recommended USDLA as one of the best places to find information about suppliers of distance education products.

An interesting aspect of this interview was the series of questions that dealt with profits, making money, and up-front expenditures for program design. These questions were more difficult to answer. It would seem that the economies of scale might make profit centers out of courses delivered without concerns for time and place, but the data to support these suppositions are hard to pin down.

After discussing distance learning for about 30 minutes, the interviewers asked me for a concluding remark. I told them this: when the wrappings are removed, and the Cosmoline is cleaned, distance education is really education. It is less different than the same as any education. It is education: the combination of teaching and learning to produce measurable, observable, and desirable outcomes—what educators have always done. I think the interviewers wanted statements and support for the contention that our field is different. I could not give them what they wanted. And finally, it is distance education, not different education.