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DISTANCE LEARNING

... For Educators, Trainers, and Leaders

*In this
issue the
spotlight is on*

*Ends and Means
Columns*

DISTANCE LEARNING

SPECIAL ISSUE

V INTRODUCTION TO THE SPECIAL ISSUE

Natalie Milman and Ryan Watkins

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—by Michael Simonson

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PURPOSE

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 four 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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Distance Learning is for leaders, practitioners, and decision makers in the fields of distance learning, e-learning, telecommunications, and related areas. It is a professional journal with applicable information for those involved in providing instruction of all kinds to 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. Articles are accepted from authors with interesting and important information about the effective practice of distance teaching and learning. No page costs are charged authors, nor are stipends paid. Two copies of the issue with the author's article will be provided. Reprints will also be available.

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THE BEST OF *DISTANCE LEARNING*

And Finally Columns – 2004-2014

Section 1: Planning for and Teaching at a Distance Education

Section 2: Leading and Managing Distance Education

Section 3: Change and Distance Education

Introduction to the Special Issue Ends and Means

Natalie Milman and Ryan Watkins

It has been 11 years since we introduced the *Ends & Means* column in *Distance Learning*. During that time we have seen tremendous growth and remarkable changes in distance learning. When we started there was no Facebook or Twitter, there was not even social media. At the time distance learning was still very much a niche market and the very notion of massive open online courses (MOOCS) was beyond even the bravest of predictions.

At the same time, many of the challenges and opportunities for those work-

ing in the field of distance learning have remained the same. Learners still come to courses often unprepared to learn in the online environment. Instructors continue to struggle to create engaging and interactive learning environments while also keeping up with technology changes, and institutions still mistakenly hope that distance learning will become a “cash cow.”

Given these dynamics of a field that is constantly evolving, we believe that now is an appropriate time to revisit several of the articles that we have offered readers in the *Ends & Means* column. The name of the col-



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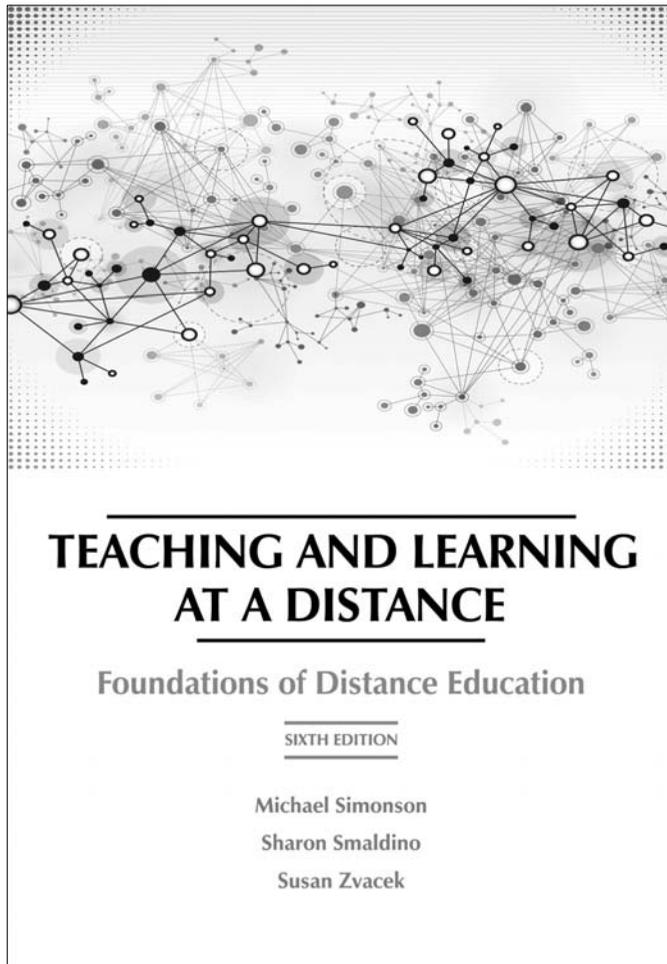
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umn is borrowed from a recurring column that Roger Kaufman published in *Educational Technology Magazine* in the 1980s, and it provides a focus for our articles in that we try to make distinctions between what we do in distance learning (e.g., teaching, interacting, grading, etc.) and what we, and more importantly our learners, accomplish as a results of those activities. In our articles we discuss both dimensions of distance learning, trying not to confuse the two.

In looking back at the 46 articles we have contributed to the column, what follows in this special issue are some of our

personal favorites. The selected articles cover a very wide variety of topics related to distance learning, and capture both the parallel and distinctive perspective we each have as authors in the field. As with our children, we tried not to show favoritism, so the articles appear in reverse chronological order and hopefully illustrate how our ideas matured along with the field.

Some of the articles may be new to you, and some you may remember from their original publication. In either case, we hope that you enjoy these articles as much as we enjoyed writing them.



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Examining Global and Glocal Awareness, Knowledge, and Competency

Natalie B. Milman

WHAT IS GLOBALIZATION?

No one can deny that we live in a world that is, indeed, global. Yet, the term “globalization,” and

other terms associated with this concept (i.e., glocalization), mean different things to different people. Still, it is important to become aware of and examine such concepts and their definitions, particularly as the need for global awareness, knowledge, and competency becomes increasingly important and prevalent, not only in higher education institutions as online programs proliferate and their desire to compete in the global marketplace grows, but also in any educational, corporate, or governmental unit.

Below are just a few examples of different definitions of globalization: These definitions can serve as a starting point for determining whether or not to incorporate this concept in the design and teaching of curricula, training, and professional development offered face-to-face, online, or in a hybrid learning environment.

- International Monetary Fund: Economic “globalization” is a historical process, the result of human innovation and technological progress. It refers to the increasing integration of economies around the



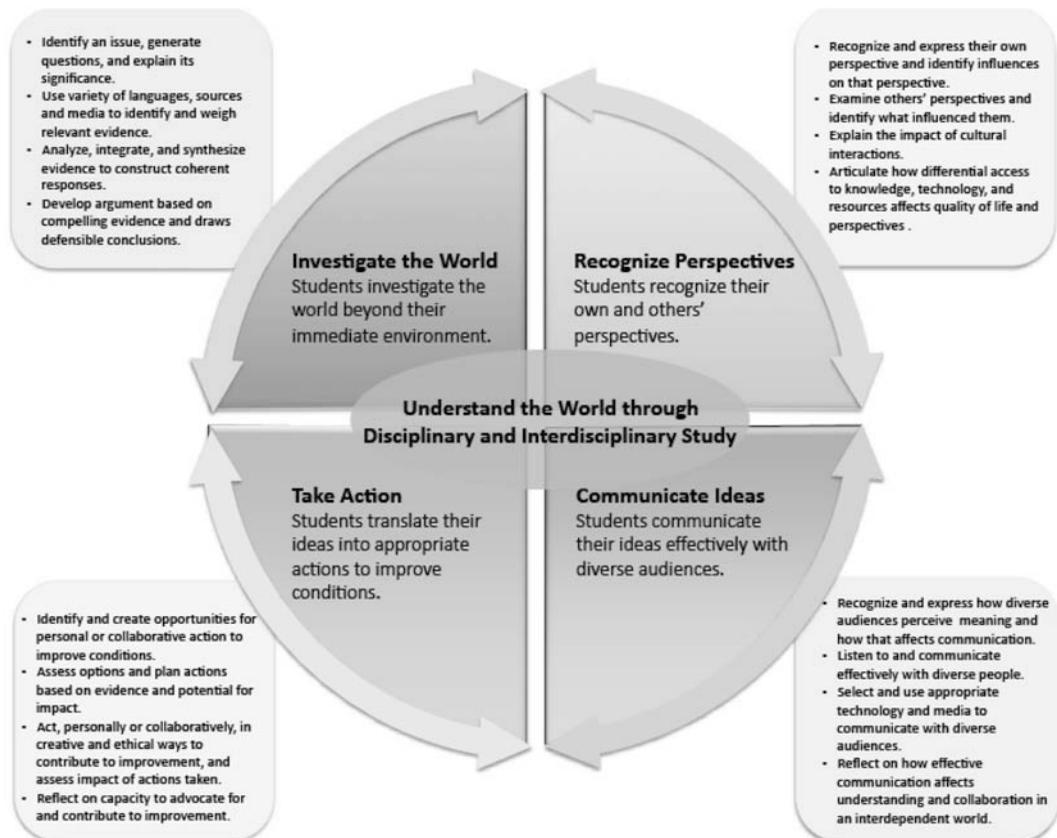
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world, particularly through the movement of goods, services, and capital across borders. The term sometimes also refers to the movement of people (labor) and knowledge (technology) across international borders. There are also broader cultural, political, and environmental dimensions of globalization (“Globalization: A brief overview,” 2008).

- *Merriam-Webster’s Dictionary*: the act or process of globalizing : the state of being globalized; *especially* : the development of an increasingly integrated global economy marked especially by free trade, free flow of capital, and the tapping of cheaper foreign labor markets (“Globalization,” n.d.)
- *Stanford Encyclopedia of Philosophy*: refers to fundamental changes in the spatial

and temporal contours of social existence, according to which the significance of space or territory undergoes shifts in the face of a no less dramatic acceleration in the temporal structure of crucial forms of human activity. Geographical distance is typically measured in time (“Globalization,” 2010).

- *Wikipedia*: is the process of extending social relations across world-space. Such extensions arise from the movements of people, things and ideas. It cannot be defined in terms of internationalization or integration as some theorists have suggested, though these developments might be an outcome of globalization. Globalization describes the interplay across cultures of macrosocial forces. (“Globalization,” n.d.)



Source: Mansilla and Jackson (2011, p. 12).

Figure 1. Global competency.

WHAT IS GLOBAL AWARENESS?

All major hiring companies need global citizens. Global sensitivities, global perspective, global insight; along with maturity and a capacity for risk-taking, are exactly the skills every major organization is looking for—in every industry. (Kevin Gill, global director of staffing for Honeywell)

In the financial world, cultural awareness and cultural adeptness are far more important than undergraduate major or existing skill sets... These needs touch all industries, from banking to healthcare to engineering. (Jonathan Jones, firmwide campus recruiting director for Goldman Sachs)

These quotes demonstrate a need for individuals from many different fields, to possess global awareness. Global awareness is:

- using 21st century skills to understand and address global issues;
- learning from and working collaboratively with individuals representing diverse cultures, religions, and lifestyles in a spirit of mutual respect and open dialogue in personal, work and community contexts; and
- understanding other nations and cultures, including the use of non-English languages (“Global Awareness,” 2011).

Yet, many recognize that global awareness is not enough—and that global competency is needed. Global competency refers to the knowledge, skills, and dispositions individuals possess, such as “the capacity and disposition to understand and act on issues of global significance” (Mansilla & Jackson, 2011, p. xiii). Figure 1 illustrates global competency and Figure 2 provides



Source: Mansilla and Jackson (2011, p. 55).

Figure 2. Global competency.

an idea of what global teaching entails. These might help offer concrete ideas for examining how this concept might be incorporated into the design and teaching of curricula, training, and professional development

WHAT IS GLOCALIZATION?

With the emphasis on globalization, it is easy to forget the need for glocal understanding, or glocalization. Glocalization generally combines ideas associated with globalization with local issues and concerns (“Glocalization,” n.d.). The concept of glocalization, or having a glocal mindset, recognizes there are often many issues and concerns that should be considered and often addressed within one’s “home” (wherever that might be) and not just abroad! Championing glocal awareness or even competency shows that one recognizes the importance of one’s locality in light of the world around them.

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GLOCALIZATION COMBINES IDEAS ASSOCIATED WITH GLOBALIZATION WITH LOCAL ISSUES AND CONCERNS.

Working in Groups Online

Suggested Tips for Success

Natalie B. Milman

FOUR SCENARIOS

Scenario 1: Cameron's peer assessment of his teammates noted that one teammate did not contribute much to the team project. He wrote that he was disappointed all semester with the teammate's caliber of work, even though the teammate was "nice." **Instructor Response:** *The instructor reviewed the team's*

objectives, tasks, and time line—after talking with Cameron, the instructor determined Cameron had different expectations than his teammates. The instructor also recommended more frequent communication among teammates to touch base about their understanding of and progress on their work, goals, objectives, and tasks.

Scenario 2: Ralph wrote in his individual reflective blog that he was very frustrated with his teammates because he felt like he was doing most of the work while they were getting a free ride. **Instructor Response:** *The instructor read all of Ralph's peers' journal entries and learned that his teammates were having difficulties with Ralph. Not only was he unsupportive of his teammates, but he also was very bossy. In response to each teammate's blog entries, the instructor posted questions for them to consider. Also, in the subsequent week's lecture, the instructor asked all groups to reflect on and assess their individual contribution to the group project, as well as how they were interacting with their peers.*

Scenario 3: Weeks into the group project, Sally left a voicemail for her instructor asking if she could work on the assigned project independently, instead of with her two other teammates because they could not agree on the next steps to finalize the assignment. **Instructor Response:** *After talking with Sally, it became clear to the*



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instructor that Sally was not communicating her need for more information about decisions made and tasks completed by her teammates. The instructor coached her to take a proactive approach with her peers by asking them questions about their progress, decisions, and any concerns she might have.

Scenario 4: Nona knew her high-pressure, full-time work responsibilities would pose challenges working in a team, especially across several different time zones all over the world. However, she was surprised to learn the biggest challenge was their different learning and work styles. She was a planner and liked to complete tasks well ahead of time. However, her two teammates had very different styles of working, which did not mesh with hers—they tended to complete work at the last minute. She was very frustrated and emailed her instructor for advice. **Instructor Response:** Her instructor recommended that Nona discuss her “learning and work style” with her teammates so they could come to a common understanding about how they might work together. She also suggested that Nona share her frustrations with them, as well as her FT workload so they also better understood why she wanted to work ahead of the deadlines. Moreover, the instructor suggested that for future group assignments, when seeking teammates that Nona should share her learning and work style with potential teammates so that there might be a better match between them.

The scenarios above represent examples of different challenges my students have experienced when working collaboratively and cooperatively on online group assignments, and a brief description of the assistance I offered in helping them solve them. Although the scenarios and solutions are not comprehensive, they shed light on some of the many problems students might encounter when working in online group assignments. They also demonstrate that even adults need to learn, practice, and be reminded of strategies for working in groups; many have these skills,

but may not have employed them in online learning environments, which pose similar yet unique challenges compared to face-to-face group work.

Below are some useful tips for students working in online teams or groups.

TIPS FOR WORKING IN GROUPS ONLINE

1. **Determine your learning style—and share that information with your teammates.** There are many online tools that help you determine your learning style. Complete one and reflect on the style the tool determines you to have. Then, figure out how you can capitalize on your learning style to benefit your group. In some cases, you may even seek teammates with similar learning styles.
2. **Agree to disagree.** Even though most of us strive for harmony and cooperation, it is impossible to agree on every decision made for completing the group assignment. Therefore, keep in mind you will need to agree to disagree with your teammates.
3. **Respect others’ opinions.** Maintaining professionalism and respecting others’ opinions as you work with your peers is of utmost importance. Even if you totally disagree, it is imperative that you respect and tolerate your peers’ opinions.
4. **Be a good listener.** Some of the best teammates are those who truly listen to their peers’ ideas and opinions.
5. **Invest in the group assignment.** Even if the assignment is the idea of one teammate, it is important to understand that each member is invested in the group assignment. Refer to the assignment as “our assignment” and not “your assignment” or “your idea.”
6. **Determine and assign group roles.** Some people are natural leaders whereas others are not. Whatever your learning style and preferred group

role, determining roles among team members will ensure that important work is completed. Some examples of roles one might take are: leader, summarizer, encourager, reporter, and facilitator.

7. **Develop a plan:** Simply assigning roles and responsibilities is not enough. It is important to have a plan for each teammate's roles, responsibilities, and timeframe for completing all tasks.
8. **Share contact information:** Be sure to provide contact information to all of the team members so they know how to contact one another.
9. **Be flexible.** Because life can be complicated, it is important to be flexible and ready to support one another. This may even mean taking on a different role, tasks, or responsibility.
10. **Ask questions.** Often we assume that others know why we did something or can read between the lines. However, that is not always the case. Asking questions helps clarify any concerns, as well as assumptions.
11. **Trust your teammates.** Have faith that your teammates will complete their work well. While they may not complete tasks as you would, understand that they will need to do it "their way."
12. **Communicate frequently, effectively, and professionally.** Frequent, efficient, and professional communication will help any group function smoothly, even if it entails sending a group e-mail to touch base about progress on the group assignment, questions one might have, or using some other mode of communication (e.g., chat, phone call, Skype, web conference, etc.). Also, let your teammates know if anything will affect your ability to complete a task on time. Even if they get upset about it, at least you will have informed them.
13. **Document and summarize your agreements, tasks, time lines, and next steps.** The best groups not only document and summarize what they have agreed to do, but they also summarize the tasks each member will complete and by when, as well as next steps. Often it helps if a member summarizes what group members have agreed to do to ensure that all members are in accord.
14. **Be prepared to compromise.** Although you may agree to disagree, at some point you will likely have to come to some compromise when making decisions.
15. **Contact your instructor for support and advice.** If you find that your team is not functioning well, or as best as it could be—even after doing all of the above steps, then get advice and support from your instructor. Chances are that your instructor will be able to give you good advice to try out to help you and your team work cooperatively.

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The Flipped Classroom Strategy

What Is it and How Can it Best be Used?

Natalie B. Milman

WHAT IS THE FLIPPED CLASSROOM?

In K-12 and higher educational circles, the “flipped classroom” instructional strategy (also known as the “inverted classroom”) has been receiving a lot of attention. The idea is that rather than tak-

ing up limited class time for an instructor to introduce a concept (often via lecture), the instructor can create a video lecture, screencast, or vodcast that teaches students the concept, freeing up valuable class time for more engaging (and often collaborative) activities typically facilitated by the instructor. It is important to note that the strategy should involve more than just the “take home” video lecture (or screencast or podcast). It should also incorporate formative and summative assessment, as well as meaningful face-to-face (F2F) learning activities. Although many instructors at all educational levels and from various settings have been incorporating this strategy for years, the term is most often attributed to two Colorado high school teachers, Jonathan Bergman and Aaron Sams, who began creating screencasts and podcasts for their students in 2006 (Makice, 2012).

The flipped classroom strategy advocates tout numerous benefits. Most seem to be plausible advantages (e.g., increases time for more engaging instruction), especially for those teaching in hybrid or blended settings consisting of some combination of F2F and online instruction; how-



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ever, the strategy also has its limitations. First, the quality of the video lecture may be very poor; even though an instructor might be outstanding in F2F settings, he or she may not produce a quality video instructionally and/or technically. Second, taking for granted that all students are able to view the video lecture on their own computers, the conditions under which they might view the video may not be the best for learning any concepts (e.g., a student might view a video while also watching a baseball game and listening to music). Arguably, there are many distractions in F2F classrooms, but at least the teacher can monitor comprehension with several formative assessments. Third, students may not watch or comprehend the video and therefore be unprepared or insufficiently prepared for the more engaging activities that will occur F2F. Fourth, students may need a lot of scaffolding to ensure they understand the material presented in the video. Although good instructors will likely build-in effective scaffolding activities while students watch the video such as “stop, think, and answer” questions (and also rewind if needed), they may still fall short in providing enough scaffolding activities for all types of learners. Fifth, students are not able to ask questions of the instructor or their peers if they watch the video alone. Therefore, important just-in-time questions to help them comprehend the material cannot occur unless the instructor is available during the viewing—which is difficult. Finally, the flipped classroom strategy may not be the best approach for second language learners or those with learning challenges—which represents learners not only at the K-12 level, but all educational levels and settings.

HOW CAN THE FLIPPED CLASSROOM STRATEGY BEST BE USED?

Although there are many limitations to the flipped classroom strategy and no empiri-

cal research exists to substantiate its use, anecdotal reports by many instructors maintain that it can be used as a valuable teaching strategy at any educational level, depending on one’s learners, resources, and time. Moreover, it seems to be a good fit for teaching knowledge that is procedural, one of the four general types of knowledge described in the revised Bloom’s Taxonomy (Anderson et al., 2001). Procedural knowledge is knowledge about how to do something. Therefore, a flipped classroom video lecture about how to solve a quadratic equation in which an instructor describes and models how to solve this type of problem would be a good use of the strategy. Complex procedural knowledge can also be taught utilizing the flipped classroom strategy although scaffolding and chunking of content will be very important not only to ensure that videos are short, but also to make certain that all of the steps of the procedure are introduced adequately so students understand it thoroughly.

Although procedural knowledge is arguably the best type of knowledge to teach using the flipped classroom strategy, the other three types of knowledge—factual (knowledge describing the basic and essential elements a person must know), conceptual (knowledge of the relationship between classifications and categories), and metacognitive knowledge (knowledge about one’s own cognition)—can also be taught using this strategy. However, it is important to note that much more time and thought will need to go into employing the flipped classroom strategy.

Many resources exist regarding the flipped classroom strategy. A few are:

- Educause article, *7 Things You Should Know About ... Flipped Classrooms*: <http://net.educause.edu/ir/library/pdf/ELI7081.pdf>
- Edutopia blog entry, *Five Best Practices for the Flipped Classroom*: <http://>

www.edutopia.org/blog/flipped-classroom-best-practices-andrew-miller

- Khan Academy—has many videos on a variety of topics: <http://www.khanacademy.org/>
- Knewton—has a good graphical representation of the flipped classroom strategy: <http://www.knewton.com/flipped-classroom/>

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FLIPPED CLASSROOM/INVERTED CLASSROOM = REDUCE LECTURES AND INCREASE COLLABORATIVE ACTIVITIES.



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Is Online Learning for All Learners?

Natalie B. Milman

With the U.S. economy still recovering from a recession, it is not surprising that the demand for “face-to-face and online course and program offerings” in institutions of higher education (IHEs) is growing, especially in public IHEs (Allen & Seaman, 2010, p. 7). In fact, “More than one in four higher educa-

tion students now take at least one course online” (Allen & Seaman, p. 1). For many administrators in IHEs facing the reality of tightening budgets, less classroom space, and the need to meet increasing enrollments, online education is an attractive solution to address these challenges, even though associated costs are often higher than those in face-to-face (F2F) courses and programs (Parry, 2011). However, before investing resources and time in converting F2F courses to an online delivery format, administrators in IHEs and other organizations interested in providing online training should thoughtfully consider whether or not the targeted courses/programs should even be taught via a distance, as well as whether or not online learning is the *best approach* for the *targeted learners*.

Although a meta-analysis conducted by Means et al. (2010) showed that students participating in online courses performed better than those in F2F courses, the researchers cautioned that several caveats were in order. For instance, they noted that “the online and classroom conditions differed in terms of time spent, curriculum and pedagogy” (p. xvii). An experimental study by Figlio, Rush, and Yin (2010) comparing online versus F2F instruction also raised concerns. Their study found that some learners, specifically Hispanics,



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males, and low achievers, performed worse in online courses than in F2F ones. Clearly these findings demonstrate that more research is needed about learners' performance in online education. However, research on factors that might influence students to withdraw from online courses and programs is worth examining, too.

Lee and Choi (2010) conducted a literature review of online course dropouts in postsecondary education. Through an analysis of 35 studies, they discovered three major categories of factors influencing online dropout rates: student factors, course/program factors, and environmental factors. Student factors included students' academic background (e.g., those who had higher grades in previous courses tended to complete online courses whereas those with lower grades had higher dropout rates), technology and time management skills, and psychological attributes (e.g., locus of control—those with a low locus of control were more likely to drop out of online courses). Course/program factors referred to course design, institutional supports (e.g., orientation), and interactions (e.g., student-student, student-instructor). Environmental factors involved work (e.g., increased workloads) and life circumstances (e.g., death in family) that affected students' ability to persist.

Of the three major factors described by Lee and Choi, the only factor that could be directly controlled by IHEs was course/program factors. Of these, institutional supports seem most promising for assisting learners. For example, one of the studies they analyzed found that the primary reason students withdrew from online courses was students' misconceptions about the demands and requirements of online courses. Moreover, the student dropouts had not completed an orientation, which could have educated them about online education (Clay, 2009 as cited in Lee & Choi, 2010). Therefore, a simple

remedy to educate potential online learners is to develop and require an orientation that informs them about the requirements for online learning before enrolling in an online course. Other supports might include encouraging or requiring such texts as Watkins and Corry's (2010) *E-learning Companion* that provides students with a comprehensive overview of the requirements and skills necessary for success in online courses. It also includes an E-learning Readiness Self-Assessment to determine their readiness for online learning and a plan to help them manage their time, peer relationships, and technology.

Increasingly, however, learners do not have a choice whether or not to take an online course. Often, it is the only option available to them. In such cases, those offering online courses should provide even more supports to foster the success of all learners. This assistance should involve completion of high-quality orientation by all students, examination, development, and implementation of effective strategies to support students in online courses, careful monitoring of the reasons why students might withdraw from online courses, factors that contribute to their persistence, and also research about factors that promote the success of all students. Online education is most likely not the best learning environment for all learners. However, if no other options are available, it is the duty of organizations and instructors to ensure that learners have the best supports available for them to be successful.

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"A LITERATURE REVIEW OF ONLINE COURSE DROPOUTS IN POSTSECONDARY EDUCATION ... DISCOVERED THREE MAJOR CATEGORIES OF FACTORS INFLUENCING ONLINE DROPOUT RATES: STUDENT FACTORS, COURSE/PROGRAM FACTORS, AND ENVIRONMENTAL FACTORS. STUDENT FACTORS INCLUDED STUDENTS' ACADEMIC BACKGROUND, TECHNOLOGY AND TIME MANAGEMENT SKILLS, AND PSYCHOLOGICAL ATTRIBUTES ... COURSE/PROGRAM FACTORS REFERRED TO COURSE DESIGN, INSTITUTIONAL SUPPORTS, AND INTERACTIONS ... ENVIRONMENTAL FACTORS INVOLVED WORK AND LIFE CIRCUMSTANCES."

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Crafting the “Right” Online Discussion Questions Using the Revised Bloom’s Taxonomy as a Framework

Natalie B. Milman

There are many different ways in which an instructor might organize an online discussion depending on the course goals, objectives, and

time frame for a discussion. For instance, an online discussion might be instructor-led, student-led, guest-led, or a combination of any of these approaches. The discussion might last a few days, a week, several weeks, months, and so on. However an online discussion is organized, *someone* must locate (e.g., use questions from a text) or develop the questions from scratch for the online discussion whether it is the instructor, students, or a guest facilitator. Yet, selecting or crafting the “right” questions for an online discussion is not an easy task! Of course many might debate what a “right” question is in the first place! The term “right” is used to differentiate it from a “good” question since good questions may not be the “right” ones to meet one’s goals and objectives, apply in an online environment, use with one’s target audience, and/or address the content.

According to Berge and Muilenburg (2002), “The right questions depend greatly on what the instructional goals and objectives are for the training, development, or education that is to take place. The right



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questions are those that foster learner engagement in the learning process” (p. 184). Yet, how is this accomplished? Berge and Muilenburg recommend using Bloom’s Taxonomy for developing questions that incorporate the higher levels of Bloom’s taxonomy since these tend to foster higher order thinking. However, Bloom’s Taxonomy has since been revised (see Anderson et al., 2001). Although other frameworks exist for developing effective online discussion questions such as the CREST+ model (Akin & Neal, 2007), this article shares a brief description of the original (Bloom, 1956) and revised Bloom’s Taxonomy (Anderson et al., 2001) and suggestions as to how one might use this framework for crafting the “right” online discussion questions to foster student engagement and higher order thinking.

WHAT IS BLOOM’S TAXONOMY? WHAT IS THE REVISED BLOOM’S TAXONOMY?

The original Bloom’s Taxonomy (Bloom, 1956) was developed by a group of higher education examiners to “establish a standard vocabulary for indicating what an item [such as a multiple choice question on an exam] was intended to measure” (Anderson et al., 2001, p. xxvii). Bloom’s Taxonomy is a classification system of cognition that identifies a continuum of six different levels. The levels, from lowest to highest, are: knowledge, understanding, application, analysis, synthesis, and evaluation. It is most often used for developing cognitive instructional objectives.

The revised Bloom’s Taxonomy was developed by a group of cognitive psychologists, curriculum theorists and instructional researchers, and teaching and assessment specialists in response to findings from more current research about our understanding of learning “emphasizing what learners know (knowledge) and how they think (cognitive processes)” (Anderson et al., 2001, p. 38). The revised Bloom’s

Taxonomy is a two-dimensional framework consisting of the “knowledge dimension” and the “cognitive process dimension.”

The knowledge dimension consists of four different types of knowledge: (1) factual, (2) conceptual, (3) procedural, and (4) metacognitive. *Factual knowledge* describes the basic and essential elements a person must know (e.g, key vocabulary). *Conceptual knowledge* refers to knowledge of the relationship between classifications and categories. *Procedural knowledge* is knowledge about how to do something, and *metacognitive knowledge* is knowledge about one’s own cognition (Anderson et al., 2001).

The cognitive process dimension includes six process categories: (1) remember, (2) understand, (3) apply, (4) analyze, (5) evaluate, and (6) create. Although more or less self-explanatory, these dimensions also have various verbs associated with them to describe them further (e.g., the verbs associated with “analyze” are “differentiating,” “organizing,” and “attributing”).

Table 1 illustrates this two-dimensional framework. Similar to the original Bloom’s Taxonomy, the revised Bloom’s Taxonomy also has a continuum of different levels from lowest to highest, as the arrows in the table show.

CRAFTING ONLINE DISCUSSION QUESTIONS USING THE REVISED BLOOM’S TAXONOMY

To create the “right” online discussion questions using the revised Bloom’s Taxonomy first requires thorough comprehension of this framework. After one has a solid understanding, one should create questions that might fall into the different knowledge and cognitive processing dimensions, based on one’s and/or a course’s goals and objectives. Once questions are developed, then one can use Table 1 to see where the questions fall into

Table 1. The Revised Bloom’s Taxonomy Table

Knowledge Dimension	Cognitive Process Dimension					
	Remember	Understand	Apply	Analyze	Evaluate	Create
Factual						
Conceptual						
Procedural						
Metacognitive						

Source: Anderson et al. (2001, p. 28).

Table 2. Sample Discussion Questions

Knowledge Dimension	Cognitive Process Dimension					
	Remember	Understand	Apply	Analyze	Evaluate	Create
Factual	#1					
Conceptual		#2				
Procedural						#4
Metacognitive					#3	

the two-dimensional framework. After revision and renewed analyses of where the questions fit, then one should select how many and which of these questions to use for the discussion, since it is unlikely all of the questions developed will be used.

Below are some examples of questions that might be used for a discussion on the principles of graphic design. Table 2 shows in which area of the revised Bloom’s Taxonomy the question might be categorized.

1. What are the four principles of graphic design? (Factual, Remember)
2. What are some examples of websites that demonstrate good implementation of the principles of graphic design? (Conceptual, Understand)
3. Evaluate how well you applied the principles of graphic design in your website. Which were integrated well? Which were incorporated poorly?

4. Explain your answers with concrete examples. (Metacognitive, Evaluate)
4. Create a simple website that applies the principles of graphic design. How did you do this? (Procedural, Create)

It is important to plan the “right” questions for online discussions. Advanced planning and attention will most likely result in a lively and engaging discussion. The application of the revised Bloom’s Taxonomy for crafting online discussion questions “can serve as a catalyst for increased adult learner understanding and meeting the instructional goals in both workplace training and higher education” (Berge & Muilenburg, 2002, p. 189), as well as fostering engagement and higher order thinking skills.

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Differentiating Instruction in Online Environments

Natalie B. Milman

Those who teach in online environments have many resources available to help them design effective online instruction ranging from first-hand accounts of teaching online (e.g., see Sugar, 2007), to recommended principles for evaluating effective online instruction (Graham, Cagiltay, Lim, Craner, & Duffy, 2001), to research that demonstrates

the importance of building a collaborative online learning community (Tu & Corry, 2003), among many other resources found in print (such as this journal!) and online, as well as through attendance at conferences. Even so, one strategy that has not been explored or discussed much in the distance education literature that may be very helpful to instructors for designing effective instruction is differentiated instruction. This article describes what differentiated instruction is and provides examples of how it may be implemented in an online course.



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WHAT IS DIFFERENTIATED INSTRUCTION?

Although many educators at all levels have implemented differentiated instruction practices in one way or another for countless years, Ward (1986) first coined the term “differential education” to describe instruction for gifted and talented students (Bravmann, 2004). Tomlinson has since advocated this approach, not only for gifted education, but most prolifically for the general P-12 education classroom. Tomlinson (2003) defines differentiated instruction as the planning, design, implementation, and evaluation of “varied approaches to what students need to learn, how they will learn

it, and/or how they can express what they have learned in order to increase the likelihood that each student will learn as much as he or she can as efficiently as possible” (p. 151). Differentiated instruction is not watering down curriculum to make it easier for some students to “pass” or more challenging for others to master the content; rather, it involves providing students opportunities to learn content using different resources, employing varied strategies, and/or allowing students to demonstrate their learning in different ways based on their individual learning needs and interests.

According to Tomlinson (1999), instructors differentiate instruction by varying the:

1. Content: Instructors differentiate the resources and sources students use to learn by using multiple resources and examples in various media formats;
2. Process: Instructors differentiate how students will learn by planning and/or structuring various learning activities and student groupings; and
3. Product: Instructors differentiate the output (how students demonstrate what they have learned) by providing different options for completing assignments.

Instructors should also vary the content, process, and product based on their students’ learning profile (i.e., learning style), interest (motivation), and/or readiness (background knowledge). Therefore, it is important for instructors to get to know their students, but also to pre-assess what they already know about a topic.

Key principles of a differentiated class are:

- The teacher is clear about what matters in subject matter.
- The teacher understands, appreciates, and builds upon student differences.

- Assessment and instruction are inseparable.
- The teacher adjusts content, process, and product in response to student readiness, interests, and learning profile.
- All students participate in respectful work.
- Students and teachers are collaborators in learning.
- Goals of a differentiated classroom are maximum growth and individual success.
- Flexibility is the hallmark of a differentiated classroom (Tomlinson, 1999, p. 48).

HOW CAN DIFFERENTIATED INSTRUCTION BE IMPLEMENTED IN AN ONLINE ENVIRONMENT?

There are many diverse ways in which one might differentiate the content, process, and product of instruction in an online environment. It is important to note, however, that just like teaching in face-to-face environments, teaching using a differentiated instruction approach can be challenging, especially when attention to the instructional design process is lacking. Yet, with careful instructional design and consideration of learners’ interests, readiness, and learning profile, instructors will likely learn that differentiating instruction is a rewarding teaching approach. Moreover, instructors should recognize that differentiating instruction does not involve differentiating every aspect of instruction. Rather, it can involve differentiating only the content or only the product required for students to demonstrate their learning. Offering students a choice is also a significant feature of differentiated instruction. Below are some ideas for differentiating instruction in an online environment; many instructors will find that they are already employing various aspects of differentiated instruction in their online instruction:

- **Differentiating content:** An instructor might differentiate content by providing the content in different formats. For instance, an instructor might provide a lecture in PDF *and* as a podcast. This allows students to access the content based on their learning profile (e.g., are they visual or auditory learners?). Also, the instructor might provide some sources for reinforcement to help students struggling with the content by including a vidcast of key vocabulary or concepts, as well as a screencast highlighting some key concepts in a lecture. Instructors can differentiate for learners interested in learning even more about the topic by providing links to online materials that challenge them to delve deeper into the content.
- **Differentiating process:** An instructor might differentiate the process by providing different learning activities for learning the content. For example, an instructor might encourage students to complete questions in a text, examine a short case scenario, or work collaboratively in small groups or individually to solve a problem. The point here is that not all students will engage in the same activity. Instead, they will likely have a choice or be assigned different assignments based on their interest, learning profile, or readiness. Students who have work experience or background knowledge on a topic might be steered towards completing advanced activities, whereas “newbies” to a topic may be asked to complete activities that provide solid, foundational knowledge of the content.
- **Differentiating product:** One way an instructor can differentiate the product, or “output,” is by giving students several choices from which to choose for completing summative assignments. Rather than requiring that all students

complete a traditional research paper, an instructor might allow students to choose from the following assignments: writing a traditional research paper, developing a wiki research “report,” creating a website, or producing a video—all on the same topic/content and using the same grading rubric for evaluation. Although it is very easy to offer students differentiated opportunities for demonstrating their learning, it is very important that instructors develop clear guidelines and grading criteria prior to requiring any specific products.

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Scaffolding Student Facilitation of Online Discussions

Natalie B. Milman

One assignment that I require in several of my courses involves a student or a team of two-to-three students to facilitate an online discussion for a week. As part of the assignment, students are to author a summary of the week's discussion and to write a reflective

"debrief statement" that shares how responsibilities were divided between co-facilitators and what they learned as a result of facilitating the week's discussion. I require the discussion facilitation assignment because I believe it is imperative that today's online students engage in determining the course of their own and their peers' learning, experience first-hand what it is like to be in charge of an online discussion (an activity they may be responsible for leading at some point professionally and/or personally), and examine the course content from different perspectives. In many ways, this assignment mirrors my constructivist (Duffy & Cunningham, 1996; Fosnot, 1989, 1996) educational philosophy.

For some students, facilitating (individually or in a team) a week's discussion can seem overwhelming because they are often uncomfortable with serving as leaders on topics new to them. And, it certainly can be very challenging, particularly if students are required to facilitate without any support. I assure my students that any feelings of unease are normal. Moreover, I actively participate in discussions to ensure that the discussions are going well and inaccurate information is addressed (if



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facilitators do not catch such inaccuracies). However, I also emphasize that I am available to answer questions, as well as help them.

To scaffold the facilitation of online discussions, first I share guidelines (see Figure 1) and resources (see Figure 2) for facilitating the discussions. Second, I model how to facilitate discussions the first few weeks of class. Third, about a week before leading a discussion, I e-mail a draft of the lecture to the upcoming week's facilitators (see Figure 3). This allows them to read the lecture ahead of time, to ask questions about the material, to craft discussion questions, and to become more comfortable with facilitating. In some courses I supply the questions for discussion and in others I require students to create them; if so, I provide examples of questions that they may use, modify, or cut. The approach used depends primarily on the course objectives. Finally, if experienced facilitators (those who have taken other courses previously with this same assignment) are enrolled in the course, I pair them with students new to the program/course so that they learn from their more experienced peers.

Overall, I have found this assignment to be very rewarding; not only for students, but also for me. I have to admit that it is difficult to relinquish the direction of our course discussions sometimes, but this is part of the learning process where learning is in the hands of students—and not just their instructors. Anecdotally, the debrief statements, the reflections on how responsibilities were divided, and lessons learned, present a picture of student learning that is far richer than if I had led the discussions. Often, students describe their surprise at how much they have learned, as well as how much effort was involved in facilitating a discussion.

Engaging students in meaningful online discourse is a major responsibility for any distance educator. Another formidable task is to foster instruction in such a way that students experience ownership of the content and the learning process. Facilitation of online discussions provides students with the opportunity to gain first-hand experience managing online discussions, determining their own learning and that of their peers, and sharing their own expertise in a content area.

1. **Read the lecture and questions for discussion** prior to your assigned week—A draft lecture is e-mailed to facilitators at least a week before the facilitation is to begin.
2. **Guide the discussions** by asking thought-provoking questions, expanding on the other students' viewpoints, offering help and feedback, and by sharing pertinent resources
3. **Promote politeness and courtesy** by being supportive and complimentary to those who provide good effort
4. **Be a responsive, engaged facilitator** by responding to many postings but not necessarily *every* posting! Keep in mind that facilitators are to foster and promote discussion. At times, a facilitator may wish to summarize or highlight an important point, and others s/he may wish to ask a question or request more information.
5. **Communicate your concerns** to your instructor and your shared responsibilities with your cofacilitator(s)—issues will arise so it is important to document and discuss your concerns. Any problems between facilitators should be communicated
6. **Summarize the week's discussion**—Part of your responsibility at the end of this week's discussion will be to bring the discussion to a close by synthesizing the week's discussion where you will also highlight salient and possibly even controversial points.

Figure 1. Guidelines for facilitating online discussions.

1. Strategies for Promoting Discussion in Your Online Course: http://www.onlinelearning.net/InstructorCommunity/tips_oct2000.html?s=324.k080m7743.112e211310
2. The Moderators HomePage, <http://www.emoderators.com/moderators.shtml>, has resources online discussion in both academic and non-academic settings (although not updated, it has some good resources)
3. Academic Technology Center—Worcester Polytechnic Institute: Provides suggestions for grading online discussions: <http://www.wpi.edu/Academics/ATC/Collaboratory/Idea/gradingdiscussions.html>

Figure 2. Resources for facilitating online discussions.

Attached is the **draft** of the week <insert #> lecture which will begin <insert day and date>. I am sending this draft early to give you time to read the lecture and ask questions. Please:

1. Review the attached DRAFT lecture of week <insert #>.
2. Communicate with your partner(s) to determine how you will share the responsibilities for cofacilitating the discussion, including writing up the summary.
3. Post three questions no later than 10 AM EST on <insert day and date>. Be sure to use "posting descriptors" in the subject line (e.g., Q1. Define Technology). NOTE: At the end of this e-mail are some suggested questions. It is up to you to use, modify, and/or craft open-ended, thought-provoking questions that will foster robust discussion (not dull, easy-to-answer questions in which your peers will simply regurgitate information that is already in the lecture, web links, and/or books).
4. Review guidelines and resources for facilitating online discussions especially:
 - Appendix A of Brescia and Miller (2005) to learn what you can **do** to do a better job at facilitating, and
 - <http://pre2005.flexiblelearning.net.au/guides/facilitation.html>
5. Contact me with any questions or concerns.
6. Post the team summary of the week's discussion and your individual "debrief" statement no later than <insert day and date> in the appropriate locations.

Figure 3. Sample e-mail with instructions to facilitators.

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Strategies for Participating in Online Conferences and Discussions

Natalie B. Milman

Recently, I was asked by one of my students in an online course for tips for managing the volume of posts to read and respond to during the course of a week's discussion (also known as an online "conference"). My

first course of action was to search for online resources that provided such information; however, the majority of sites I found introduced recommendations for instructors or those facilitating discussions rather than strategies for students to make the most of their participation in online discussions. The second step in helping my student was to review the research articles and books I had amassed over the years about online discussions and distance education. Upon reviewing these, though, I encountered the same dilemma: the majority provided strategies for how instructors and facilitators could structure discussions to improve students' experiences but not ways in which students could better manage the process themselves. Therefore, I decided to develop my own recommendations. Below is a summary of the strategies that I have found to be helpful for students to be successful when participating in online discussions, no matter the setting. I am sure there are others applicable to unique settings and situations, but hope these will serve as a foundation from which to build.



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BECOME FAMILIAR WITH THE REQUIREMENTS FOR POSTING

To ensure you address the minimal requirements of participating in online discussions, it is important to become familiar first with what these are! If the requirements are not clear, be sure to ask the instructor for clarification. Your progress (and also very often your grade) depends on the quality and quantity of your participation and, in many cases, also when you participate. If you are not sure about how you are graded or would like an explanation for why you earned a particular grade—ask! It is your right to know and understand the assessment criteria utilized by your instructors.

DO NOT READ AND/OR REPLY TO EVERY POST

In a face-to-face discussion, would you be expected to answer every question asked by your instructor during class, or comment on every reply made by a peer? The answer is “no”! Likewise, you do not need to read or engage in *every* thread of a discussion. Read the subject heading for each post to help you determine if you believe you should read it. Of course, it helps if you and your peers use appropriate subject headings in your posts! One caveat, though, is that your instructor may require you to read every post—so ensure you fully understand the participation requirements.

USE APPROPRIATE SUBJECT HEADINGS!

It is very frustrating to read an entry that essentially says nothing new or is directed at a particular individual. Also, it is maddening to read a list of headings that are all identical. To ensure that your peers and instructor understand what is in your post, provide a clear, concise subject heading that elucidates just this. And, if a particular posting is directed to a particular

person, use a heading such as, “To Natalie—I disagree!”

REPHRASE AND/OR QUOTE YOUR PEERS

To ensure everyone understands your reply or question, be sure to include the portion of the question or comment and the author that your reply builds on in your response by highlighting it or posting it in a different color to differentiate it from your response.

DEVELOP A PERSONAL SCHEDULE—AND STICK TO IT!

After you become familiar with the participation requirements for the online discussion, set a schedule to ensure you address the requirements. Many instructors of online courses factor in the quantity and quality of your postings for your grade, as well as *when* you post your comments. For instance, to earn full points, you may need to post throughout the course of a week as opposed to only the last 3 days of a week’s discussion.

SPELL CHECK

Spelling is not each one of our strengths. No need to fear, though—spell check can help. Simply type your reply to a posting in a word processing program first, then conduct a spell check. Then, copy and paste your comments in the online discussion. Note also that many current versions of discussion boards include a spell check feature, so why not use it?

REVIEW YOUR RESPONSE BEFORE HITTING SUBMIT!

Have you ever received or, even worse, sent an e-mail that you did not intend to send yet? This can happen with your posts, too. Before you submit a posting, be sure to read it to ensure the response reflects what you really want to communicate about a topic.

BE PROFESSIONAL AND RESPECTFUL

It is imperative that you show humanity, respect, and professionalism in your posts, even if you wholeheartedly disagree with someone's views! Although we might think that no one will post "ugly" remarks, occasionally some people do. And, sometimes it is not even on purpose. So, be careful, polite, and tactful. In an online environment, words can speak louder than actions. And, if a post is upsetting to you, contact the individual in person or via e-mail directly, or contact your instructor to ask that he or she contact the individual personally—but please do not humiliate or antagonize by making a questionable post that everyone can see.

AGREE TO DISAGREE

It is important to keep in mind that the point of participating in online discussions is not to agree on everything; rather, it is to share and examine various perspectives about different issues. In fact, some of the best discussions I have participated in were those in which I did not agree at all with some of my peers and students. As such, let us agree to disagree!

CONTRIBUTE MEANINGFUL CONTENT AND RESOURCES

Participating in online discussions (and hopefully also an online learning community) involves the sharing and receiving of meaningful information, pertinent to course content. The Web affords us with the opportunity to link to definitions or other resources of interest, so please take advantage of the Web in making a meaningful contribution about the topics examined.

INCLUDE APPROPRIATE REFERENCES

Where applicable, include appropriate references—not only to give credit where credit is due, but also to substantiate your reply. Plus, it shows you have done your

homework when you can weave in references from your reading and other sources.

PRACTICE PARSIMONY

Just because you can write a whole lot of information and link to many, many resources does not mean that doing so will add to the "conversation." It is important to practice parsimony in your postings by answering question(s) in a concise manner.

ASK QUESTIONS

If you do not understand a particular post, concept, or acronym offered, ask the author for clarification. Oftentimes, students in online discussions shy away from asking a "dumb" question. Well, there are *no* dumb questions when it involves learning about a topic. And, chances are, if you do not understand something, there are many others who do not, too!

STICK TO THE TOPIC AT HAND

Sometimes students go off on tangents about topics that are not relevant to the topic being discussed. Be sure to stick to the topic at hand, and if you do have something very, very important to share that is somewhat related, ensure that you make this clear in your subject heading.

"COLLECT" OR DOWNLOAD ITEMS IN AN ENTIRE THREAD

Most systems that support online discussions include a feature that allows you to "collect," download, and/or print a group of postings. For many, this is an easier way to read posts (all in one long "thread") that saves time from having to click on individual posts. Also, most systems that have this feature allow you to select which items have been read, too. Thus, there is no need to sift between items that have and have not been read previously.

SUMMARIZE AND REFLECT

To help you get the most out of a discussion, reflect on your learning by summarizing the major points discussed and learned during the course of a discussion (e.g., during one week). This will help you understand the material better, as well as remember the information covered. You may even wish to enlist some peers in dividing up the work if writing a summary is not a required follow-up assignment to the discussion.

EXPECT THE UNEXPECTED

Although most systems that support online discussions are stable, you may encounter a problem accessing it or getting online; therefore, do not wait until the last minute to make posts. And, you may wish to have a backup plan for accessing the Internet to make your posts in case, say, your electricity goes out and your laptop is not charged!

If e-Learning Is the Solution, What Is the Problem?

Ryan Watkins

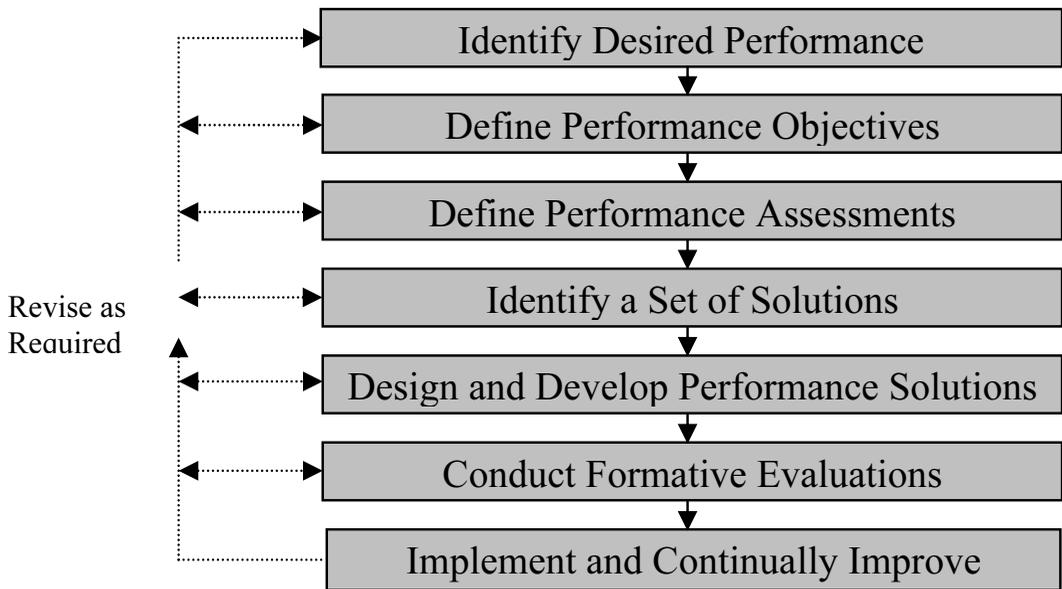
E-learning has become a common tool for improving individual performance in today's organizations and institutions. Improving the performance of people is, after all, a worthy ambition, and learning is a frequent contributor to success. But the path from the

ambition of improving performance to the accomplishment of useful results can be a difficult one. From e-learning to mentoring and from traditional training to employee retention, improving performance almost always requires more than just one improvement activity. As a consequence, we should view e-learning as just one potential component of any effort to improve either individual or organizational performance.

While visions, missions, and strategic plans are valuable and necessary foundations for accomplishing beneficial results, you can only improve performance by selecting, designing, and developing capable activities. Yet, to begin you must know what it is you are trying to accomplish. In other words, you must know the problem if you are going to select, design, and develop solutions that are intended to improve performance. Thus, effective approaches to improving performance don't rely on any specific activity, intervention, or solution to accomplish desired results. As we know, learning activities such as training and e-learning can only address a limited number of issues that lead to less than desirable performance



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Source: Watkins (2007).

Figure 1. A general systematic model for selecting, designing, and developing performance improvement systems.

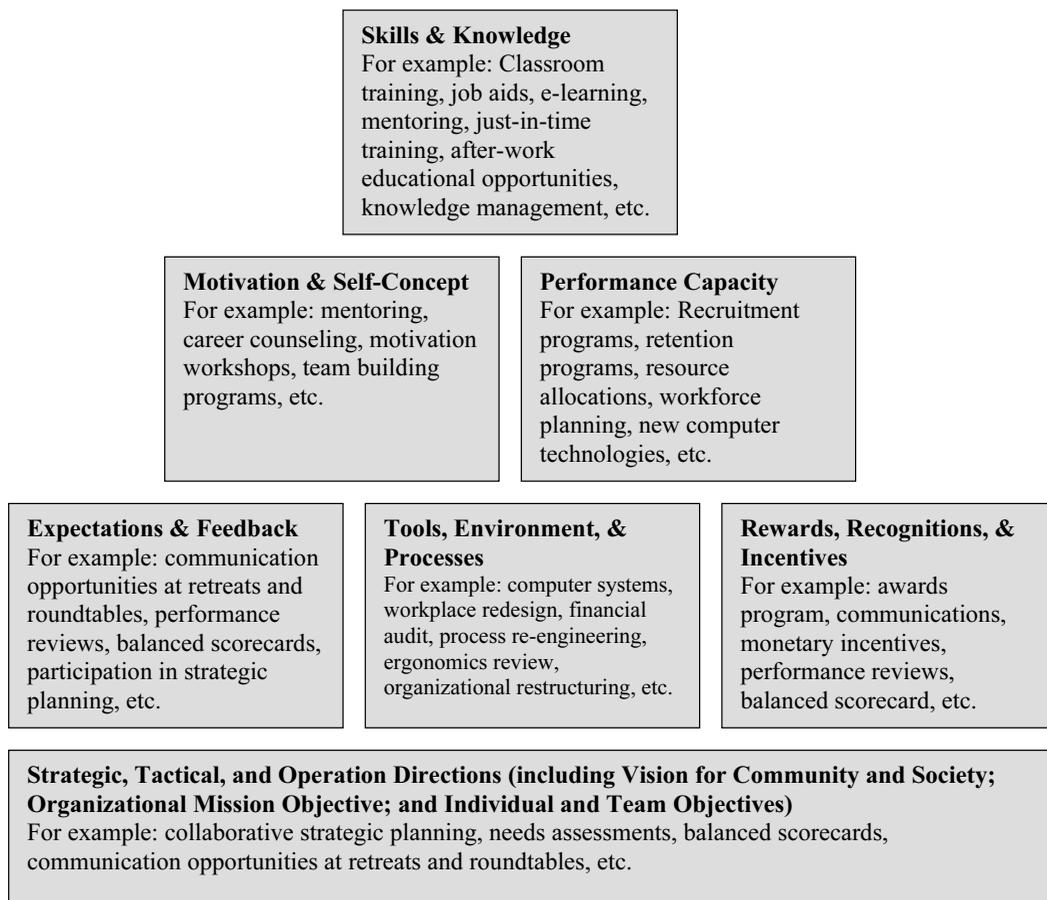
(specifically, issues related to knowledge, skills, attitudes, and abilities). In addition, e-learning activities do not address outdated processes, limited resources, lack of supervisor feedback, poor recruiting, inadequate performance appraisals, or policies that punish desired performance, to name just a few.

Equally, you do not want to rely on a training approach, instructional design approach, an even an e-learning approach to improving performance in your organization. Rather, apply a systematic process for selecting, designing, and developing a system of multiple activities based on their individual and combined abilities to accomplish desired results (see Figure 1).

Using this process, you can assess the capabilities of various potential improvement activities before choosing the right combination for achieving results in your organization. From mentoring programs and leadership seminars to e-learning and electronic performance support, you

should evaluate all of your options rather than sticking to just the ones you know best (see Figure 2 for examples). You can then address complex challenges and opportunities, rather than creating random acts of improvement through quick-fixes. You can even blend activities that individually and collectively to improve performance (such as, mixing career planning, health and wellness programs, and workforce planning; or combining recognition programs, e-learning, job aids, and a performance appraisal system).

As you can see, e-learning alone can rarely address complex performance challenges and achieve sustainable, beneficial results. While e-learning may frequently be part of your improvement plan, you should embed it within a more comprehensive approach that addresses performance problems from multiple perspectives; this allows you to capitalize on the strengths of e-learning, while not depending on it to accomplish everything by itself.



Source: Watkins (2007; based on Wedman & Diggs, 2001).

Figure 2. The performance pyramid with sample performance improvement activities.

Focus first and foremost on the measurable results you want to accomplish and then look at all of your options for implementing useful improvement activities. Use e-learning wisely and it will be a great tool for your improvement efforts.

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Developing a Digital Portfolio

Natalie B. Milman

In a previous *Ends and Means* article, Watkins (2005) discussed the importance of online programs and students marketing their own successes not only to promote online programs and individuals' achievements, but also to demonstrate program quality. A growing number of individuals, programs, and institutions across the United States and abroad, with

varying purposes, are using digital portfolios to do just this—and the numbers will likely grow. Consider that nearly 30% of public universities and 18% of private universities across the [United States]" use digital portfolios in some way (Green, 2004, as cited in Carney, 2006, p. 89) and 89% of the nation's schools, colleges, and departments of education are using portfolios in some capacity, too (Salzman, Denner, & Harris, 2002). These numbers show an interest in using digital portfolios, as Batson (2002) declared:

The term "electronic portfolio," or "ePortfolio," is on everyone's lips. We often hear it associated with assessment, but also with accreditation, reflection, student résumés, and career tracking. It's as if this new tool is the answer to all the questions we didn't realize we were asking. (para. 1)

In this article, I briefly describe what digital portfolios are, what the digital portfolio development process involves, which approaches might be used for developing one, and how some programs are using digital portfolios, by sharing some specific examples.

WHAT IS A DIGITAL PORTFOLIO?

A portfolio is a goal-driven, organized, collection of materials (often referred to as



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artifacts) that demonstrates a person's expansion of knowledge and skills over time. The contents, organization, and presentation of materials in a portfolio vary greatly, depending on its audience (e.g., employer or faculty advisor), purpose (e.g., to get a job versus to demonstrate a masters degree requirement), and type (e.g., showcase or employment portfolio). Digital portfolios, sometimes referred to as electronic portfolios, e-folios, multimedia portfolios, Webfolios and electronically-augmented portfolios, contain much of the same content as regular, traditional portfolios, but their materials are produced and shared in digital format such as a Web site (Kilbane & Milman, 2003, 2005). As a result, digital portfolios are not merely a number of artifacts or lists of experiences put onto the Web without a specific goal and ability to demonstrate reflection. A digital portfolio is *not* an electronic résumé. What distinguishes it from one is that it contains thoughtful, professional, reflective comments about its contents.

WHY DEVELOP A DIGITAL PORTFOLIO?

There are many reasons why you (or your students) might develop a digital portfolio. Among the many reasons for developing one are that they provide an easy and efficient way to showcase your knowledge and professionalism with many people simultaneously (there is no need to tote around a heavy binder of materials from person to person!), update portfolio materials effortlessly and cheaply, illustrate much sought-after technology skills, and control your "message." Academic programs within institutions can benefit as well from digital portfolios. For example, a program can highlight information about its courses and degree areas that demonstrate its quality and validate student competency, while also providing a marketing tool.

WHAT IS THE DIGITAL PORTFOLIO DEVELOPMENT PROCESS?

Embarking on the creation of a digital portfolio is similar to going on a journey. It is a journey that will take you places you may not have otherwise visited (i.e., creation of a portfolio), or places you have not visited in some time (e.g., your résumé that requires updating, some wrinkled letters from a colleague, professor, or employer complimenting you on your work, or an old PowerPoint presentation you created years ago). The fun part about taking this journey is having other people to experience the new sights and adventures with you. So, I encourage you to find some critical friends, people you know will give you constructive feedback about your portfolio and who might develop their own portfolios along with you. This will provide you with a community of critical friends so that you may lean on each other, both for direction in this journey as well as encouragement, advice, ideas, critiques, help, and camaraderie.

OVERVIEW OF THE STEPS IN THE DIGITAL PORTFOLIO PROCESS

Before creating a digital portfolio, it is important to understand the five basic stages in the development of a portfolio (Kilbane & Milman, 2003), each consisting of several distinct processes or steps. They are:

Planning the portfolio. Focus on the goals of your portfolio and frame its objectives. Focusing your portfolio involves identifying the purpose(s) for and intended audience(s) of your portfolio, whereas framing your portfolio entails creating continuity among the various components of your portfolio.

Considering portfolio contents. Collect, select, and reflect on the materials you will include in your portfolio. In the beginning of this stage, the emphasis is on quantity (e.g., collecting as many artifacts as possible), and then on quality (e.g., selecting the

artifacts one wants to include in the portfolio). It also includes reflecting on the portfolio contents by writing reflective statements that provide commentary about the artifact, as well as information about what you have learned from it.

Designing the portfolio. Organize the materials you have selected and assemble them into digital pieces that make up your portfolio. This stage consists of organizing the contents of the portfolio, creating a table of contents, creating a storyboard and design grid, and finally actually producing the portfolio. Many artifacts may not be in an electronic format when you select them, therefore you may have to, for example, scan pictures or papers in order to include them in your new portfolio.

Evaluating the portfolio. Conduct formative evaluation to improve your portfolio-in-progress and summative evaluation to determine the quality of your portfolio. You may use rubrics or short question-and-answer forms for conducting these evaluations.

Publishing the portfolio. In this stage, you perform the necessary activities to present your portfolio materials in a format that others can view. This state requires server space for uploading your portfolio so that it is accessible on the Web.

WHAT APPROACHES/TOOLS ARE AVAILABLE FOR CREATING DIGITAL PORTFOLIOS?

There are two major approaches for developing a digital portfolio: the integrative approach and the turnkey solution approach (Kilbane & Milman, 2005). Each of these has its advantages and challenges. The integrative approach involves a variety of skills, programs, and knowledge about various software programs, such as Web site development, graphics, and FTP software. If you were to create a digital portfolio using this approach, you might use Dreamweaver for developing your

portfolio Web site, Photoshop for creating and modifying any graphics, and WS_FTP for uploading and downloading files to a server.

On the other hand, turnkey solutions require less technical skills and knowledge, and typically require simply understanding how to upload and download your files using the turnkey solution's Web-based interface. Usually this approach requires creating files in a common file format such as Microsoft Word that can be uploaded via the turnkey solution's Web site. A few popular turnkey solutions are:

- Chalk and Wire (<http://www.chalkandwire.com/>);
- Epsilen (<http://www.epsilen.com/Epsilen/Public/Home.aspx>); and
- Taskstream (<http://www.taskstream.com/pub/electronicportfolio.asp>).

You can also use blog, social networking, or other template-driven Web sites if you are not comfortable publishing your own Web page.

The best advice I can share for choosing an approach is to evaluate: your skills and available resources; the amount of creative and technical control you desire in the digital portfolio's appearance, navigation, and organization; and, ultimately, the amount of time you want to spend creating one. An excellent resource for learning more about digital portfolios is Helen Barrett's site (see <http://electronicportfolios.com/>). She also maintains a site that contains multiple versions of her digital portfolio using various approaches and tools (see <http://electronicportfolios.com/myportfolio/index.html>). Here you can see first-hand what a digital portfolio looks like using various turnkey solutions, as well as some other open source tools.

HOW ARE PROGRAMS OF HIGHER EDUCATION USING DIGITAL PORTFOLIOS?

I believe the best way to learn about the potential for digital portfolios is to examine some first-hand. Keep in mind that digital portfolios are being created and promoted for a range of purposes and audiences, occasionally resulting in conflicting outcomes. Some programs dictate the contents, whereas others allow students complete autonomy in choosing which items to include. As you examine these digital portfolios, consider how we might use these tools for “encouraging our students to share their positive online experiences with their colleagues and working together to market the value of online graduates to the many organizations that may be their future employers” (Watkins, 2005, p. 35). Consider how these digital portfolios market your achievement or an academic program’s successes as well. Examples of digital portfolios created by individuals and compiled by specific pro-

grams are available at <http://home.gwu.edu/~nmilman/dl>

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A PORTFOLIO IS A GOAL-DRIVEN, ORGANIZED, COLLECTION OF MATERIALS THAT DEMONSTRATES A PERSON’S EXPANSION OF KNOWLEDGE AND SKILLS OVER TIME.

Is Google Making Us Dumber?

Ryan Watkins

Tough question. From the best I can tell the answer depends on the task at hand. Google, along with several other Internet-based technologies, has notably transformed not only how we access information but also how we interact with others regarding information as well as how we create knowledge based on information. For many tasks, these

changes could easily lead us to the conclusion that people are becoming dumber thanks to tools like Google. After all, they have significantly altered the conventional competencies we routinely associate with success in modern society.

College students today, for example, rarely go to the library in search of books, periodicals, journals, and other traditional reference materials for use in their term papers. Instead they commonly rely on Internet search tools to find available wikis, blogs, podcasts, and other nontraditional sources of information. Sometimes they find accurate and worthwhile information to guide their thinking; often, however, they fail to even scratch the surface of the information, knowledge, and wisdom that is available, but not on the Internet. Limiting our ideas solely to those that are easily found online does little to advance our abilities to create knowledge from information. In this way, tools like Google may be making us dumber.

Our easy access to the vast amount of information available online provides us with a valuable, yet precarious, resource. While Google search results may provide us with quick access to information on most any topic, at most any time, from most any location; many of us are easily lulled into a false confidence regarding the



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quality and breadth of information we get back from our searches. We often forget that Google, as a private, for-profit company, is in the business of pushing content to us using the always coveted first-line-search-return that was routinely sold to the highest bidder. Likewise, online tools like Wikipedia can inflate our sense of information quality, as the openness of the tool, a characteristic that makes it especially comprehensive, can be its greatest liability when it comes to the quality of information.

Our false confidence in the quality of information available on the Internet may also come from a continuing perception that anything that is published must be of quality. After all, just 2 decades ago published media were limited to the tight controls of a few publishing companies that maintained a large staff of quality-control editors. Today, however, most anyone can publish their thoughts and ideas to the Internet; regardless of the quality, accuracy, biases, or other characteristics that each of us must weigh when determining what information we should use when making decisions or building knowledge.

Nevertheless, as we continually modernize the standards used to judge a person's capacity to be successful, we quickly find that tools such as Google are likewise transforming the corresponding competencies. The knowledge and skills that were precursors of success just a few years ago are no longer the minimal standards that we can apply today to judge competence. From selecting the right search tools for the task to accurately assessing the quality of information, the competencies

being developed by Internet users today may give them the capacity to be smarter than any generation in the past.

Developing effective skills for identifying, accessing, comprehending, analyzing, and evaluating information that is available online have therefore become essential to those who will be successful in our connected world. From efficiently using online library databases to applying systematic evaluation criteria to Web articles, the skill set of Google users must grow beyond keyword searches to include a comprehensive approach to managing the volume, quality, and usefulness of information that is now available.

In the future, as the traditional resources for building knowledge move into more publicly available online formats, tools like Google have the opportunity to expand access to information for people around the world. In doing this they can add valuable new dimensions to the standards we use to define a person's capacity for success; or, as is the case today, they can provide only a limited view of the information, knowledge, and wisdom the world has to offer. These are not, however, decisions for Google to make alone. As is characteristically the case with most Internet-based technologies, the users of the Internet will determine the fate of Google, the fate of knowledge, as well as the fate of our own intellects. When used poorly, tools like Google can limit our perspectives; when used wisely, these tools can complement, update, and even expand the information that we will hopefully transform into knowledge and wisdom to be shared with others.

Where Are We Going ... and Why?

Ryan Watkins

For decades, technologies such as satellite communications, personal computers, the Internet, and learning management systems have been primary drivers in the evolution of distance learning. These *electronic* technologies have simultaneously challenged and changed how learning is viewed by students, instructors, managers, CEOs, and others. From where we learn and when we learn,

to how we learn and what we learn, these and other technologies continue to challenge our perspectives of learning, frequently turning many of our perceptions upside-down.

For students and instructors alike, numerous benefits have been the consequence of these technical innovations. The Internet, for instance, offers educational and training opportunities to millions of people who would otherwise be disadvantaged by their geographical location, physical disabilities, and/or competing obligations. Similarly, personal computers provide millions of users with the capacity to create and share information more easily than at any other time in history.

Yet, as I have discussed in previous *Ends and Means* columns, advancements in these technologies have outpaced advancements in *conceptual* technologies (such as theories, procedures, frameworks, and models) for creating effective learning experiences. This lag has left instructors, learners, researchers, instructional designers, and others without clear answers to where they are headed with distance learning and why.

Instead, we seem to be on a never-ending merry-go-round of *electronic* technologies. As soon as we grab one gold ring (e.g., podcasting, compact streaming media,



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wikis), a new technology is released and we are once again grabbing for the next technology. Often, we are striving to integrate the newest technologies before we have even discovered the potentials of the earlier technologies. And, more often than not, we are applying new technologies without any theoretical or foundational frameworks for relating technologies to learner performance.

Without strategic objectives to answer the questions about where we are going and why (and lacking *conceptual* technologies to guide our practice) we just keep grabbing for the next gold ring without knowing if it is going to help us achieve our goals. Frequently, we can't even describe how we will measure our success beyond the boundaries of the next fiscal quarter, let alone two, three, five or even ten years down the road. And getting off the merry-go-round to catch your breath is difficult, if not impossible. All of this leaves us with little time, and few opportunities, to reflect on "where we are going, and why?"

Advances in technological hardware and software are not likely to end, nor should they. By no means do I advocate that the merry-go-round should stop. These advances continue to expand our capacity to deliver valuable learning experiences to learners around the world. But we must also find time in our busy schedules to ask basic questions about what results we are trying to accomplish and why those results are of value to our students, organizations, and communities. These answers, after all, should guide our decisions to a much greater degree than the technology tools we may (or may not) use to achieve our objectives.

Take a few minutes now to reflect on where are you and your organization are going with distance learning. Then ask yourself "why?" Can you identify the strategic objectives that distance learning is intended to accomplish for your organization, its clients, and your societal partners?

Is distance learning simply an option to cut production and delivery costs, or is distance learning intended to guide colleagues, clients, organizational partners, and others in the accomplishment of useful results? Are advances in distance learning technologies leading your daily decisions, or are the strategic objectives of your organization and its partners you guide?

For most of us, these are challenging questions to answer. Frequently, we are too busy trying to achieve loosely defined goals to question and discover why they are our goals in the first place. The daily tasks associated with designing, publishing, and revising e-learning tutorials, for example, take the place of any time we may have had for adequate pre-design planning, needs assessment, and needs analysis. Strategic plans routinely gather dust on the shelf while our daily to-do list grows in length and complexity.

Yet, these are essential questions for everyone in all organizations to ask and answer. Without clear answers to these, we are left to continually chase the latest in technological advances, not knowing which are going to truly help us achieve valuable results for our internal and external partners. After all, if you don't know where you are going, then any path (or technology) will do.

If you don't have clear answers to the questions of where you are going and why, now is the perfect time to find them. With the answers, you can then ensure that all of your daily decisions are made on the basis of accomplishing long-term goals and objectives, letting strategic ambitions replace new technologies in deciding where to go next and why.

Begin by reviewing the strategic plans of your organization and its partners. Include the long-term goals of your organization along with the strategic goals of clients, clients' clients, the communities you service, suppliers, and others. Building a comprehensive understanding of where

your efforts fit in this mosaic is critical to determining where you are headed, and why.

If you can't find answers in current strategic planning documents, then this is likely an indication that it is time for your organization to undertake practical strategic planning. Every department, division, and person within an organization should be able to look to the strategic plans of their organization to identify their contributions and guide their decisions. From maintenance crews to software engineers, the strategic plan of an organization should provide answers to where they are going and why.

Useful strategic plans develop out of collaborations with internal and external organizational partners. These collaborative efforts help you define the valuable results that your organization, together with its partners, is working to accomplish for clients, clients' clients, and others in society. Consequently, practical strategic planning begins outside of the organization and provides a foundation for answering the question "why?"

Begin strategic planning outside of your organization and then move inward as you look to define the desired results of the individuals, departments, units, and other colleagues that make up your organiza-

tion. This outside-inside approach ensures that the goals and objectives within the organizations are aligned with the desired results of your external partners. For instance, if your clients' clients are looking to use your products in a safe and effective manner, then any internal training and education for new customer service representatives should include skills related to answering the safety questions of indirect clients. This external alignment then replaces old planning processes where you may have started with off-the-shelf e-learning modules on customer service and then looked for "problems" that these resources could address.

Even when your direct-clients are internal to your organization (for example, new employees or the manufacturing division), your strategic goals and objectives should be informed by the external clients. This ensures that your decisions are aligned with the long-term objectives of all organizational partners rather than those of discrete factions within the organization. Focus first and foremost on the desired results of your external partners (including clients, suppliers, and community members), and you will quickly learn where you are heading and, more importantly, why.

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Twenty Essential Questions for Deciding if Your Organization Is Ready for E-learning

Ryan Watkins

E-learning takes on many forms and functions in organizations. Although e-learning is often closely associated with Internet-based

training, the true range of e-learning delivery options is much broader (such as Internet, CD, DVD, satellite, digital cable, PDA, and Blackberry), as are the types of e-learning events (such as seminars, job aids, tutorials, audio books, quizzes, and study guides). That's why e-learning in your organization may include such diverse opportunities as brown-bag lunches facilitated by desktop video or certification programs delivered on DVDs. This diversity also highlights why e-learning decisions must be based on holistic (or systemic) business models (Watkins & Kaufman, 2003).

Making practical decisions requires multiple perspectives on what e-learning can and cannot achieve for your organization. Both a systemic model for ensuring that all e-learning activities lead to useful results and a holistic framework of a complete e-learning system can be useful tools as you try to determine if your organization is ready for e-learning. Even if e-learning in your organization will include just a few vendor-purchased online courses,



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assessing your organization’s readiness for e-learning multiple perspectives is an essential step toward success.

As a foundation for making useful decisions, begin with a model for aligning all that you and your organization uses, does, produces, delivers, and contributes. This gives you a valuable systemic perspective on e-learning success—aligning inputs, processes, and results. Use the Organizational Elements Model as a framework for viewing these relationships (see Table 1). The Model helps you to align the resource that you use (i.e., inputs) and the activities that you participate in (i.e., processes) with the results that you create (i.e., products), the value they add to your organization’s deliverables (i.e., outputs), and the expected contributions of clients, community members, and others (i.e., outcomes).

The Organizational Elements Model helps you relate and align organization resources, activities, and results. Yet,

because e-learning initiatives are complex systems with many variables critical to their success, you will want to also view your organization’s readiness from a second perspective. This second, e-learning specific, perspective adds structure and context to your readiness decisions. From this perspective e-learning initiatives are viewed in relation to eight distinct, yet closely related, dimensions (based on Kahn, 2005 and Watkins, 2006). These dimensions are:

Organization—focuses on the alignment of results at the individual/team, organizational, and societal levels (accomplishing results that contribute to success at each level is essential).

Pedagogy—refers to issues related to goals/objectives; design approach; instructional strategies and tactics; e-learning activities; formative, summative, and goal-free evaluation; and media selection.

Table 1
The Organizational Elements Model

Level of Results	Focus	Examples
Societal outcomes	Results to be contributed to external partners, clients’ clients, and the shared society.	<ul style="list-style-type: none"> • Profits over time (not just one-shot) • Self-sufficient citizens • Zero disabilities from accidents • Zero starvation
Organizational outputs	Results to be delivered by the organization to external clients.	<ul style="list-style-type: none"> • Delivered vehicle • Discharged patient • Competent graduate • Dividends • Unpolluted exhaust
Individual/team products	Results to be produced by individuals or teams for internal partners and clients.	<ul style="list-style-type: none"> • Delivered technical advice • DVD training materials • Manual for executive coaches • Component of automobile brake system
Processes	The activities or steps used within an organization to accomplish results	<ul style="list-style-type: none"> • Training • Designing courses • Formatively evaluating materials • Managing
Inputs	The resources or assets used within an organization to facilitate processes	<ul style="list-style-type: none"> • Servers • People • Satellite dishes • Money

Source: Based on Watkins (2006) and Kaufman (2006).

Technology—comprised of infrastructure planning and installation, as well as hardware and software issues.

Interface Design—focuses on all aspects of how the learner interacts with the learning technology, instructor, and peers in the learning experience (e.g., Web-page design, videoconference layout, content design, navigation, and usability testing).

Evaluation—relates to issues concerning assessment of learners, return on investment, and formative evaluation of instructional materials (i.e., finding what works and what doesn't, so results can be improved upon).

Management—focuses on successful maintenance of learning environments, distribution of information issues, management of personnel, and leadership.

Resource Support—examines issues related to online support and resources for learners, instructors, developers, administrators, and others.

Ethical—evaluates issues of plagiarism, social and cultural diversity, geographical diversity, learner diversity, information accessibility, etiquette, adding measurable value to our shared society, and legal issues.

By applying both of these tools (the Organizational Elements Model and the eight dimensions of a complete e-learning system) you can gain a holistic perspective of e-learning within your organization. Out of them you can also derive many questions that should be asked (and answered) before deciding if your organization is ready for e-learning. Below are the 20 essential questions I have found to be most useful when working with organizations.

ORGANIZATION

1. Is the organization committed to the long-term success of its clients, clients'

clients, and others in our shared society?

2. Is the organization committed to the contributions made through the professional development of its associates?
3. Does the organization integrate e-learning as part of the long-term strategic plans?
4. Have the required results for continuing organizational success been linked to the capabilities of e-learning solutions?

PEDAGOGY

5. Will training content be based on formal job/task/performance analysis?
6. Will e-learning content and activities be linked to the accomplishment of results by learners after the training?
7. Will e-learning courses be aligned with other e-learning (and non e-learning) courses to ensure synergy?

TECHNOLOGY

8. Will e-learning technologies support a variety of media technologies (e.g., video, audio, synchronous, asynchronous)?
9. Who will maintain the technology infrastructure for e-learning?

INTERFACE DESIGN

10. Will the e-learning interface provide learners with visual information on their progress and offer opportunities to create long-term learning plans?

MANAGEMENT

11. Will the training team have adequate experience, knowledge, and skills to develop interactive e-learning materials and learning environments?
12. Will e-learning instructors receive training on using the e-learning tech-

nology and interacting with learners online?

13. Will instructors have time to provide individualized feedback to learners throughout the e-learning course?
14. Will associates taking courses have the e-learning study skills and technology experience necessary for success in this new learning environment?
15. Will associates taking courses have the work-release time (and supervisor support) to be successful in their courses?

RESOURCE SUPPORT

16. Will associates taking courses have access to specialized technology support personnel (as well as content support staff)?
17. Will the training developers have access to the design and development technologies (e.g., digital media converters, course management system) necessary to create useful learning experiences?

ETHICS

18. Will the organization develop and communicate comprehensive plagiarism and/or code of conduct policies regarding e-learning?

EVALUATION AND CONTINUAL IMPROVEMENT

19. Will e-learning courses have time and resources for formatively evaluating all courses so improvement can be made prior to release?
20. Will the e-learning initiative be evaluating for accomplishing results that

align all that the organization uses, does, produces, and delivers with the desired contributions of external clients and society?

CONCLUSION

When trying to decide if e-learning is the “right” tool for your organization, take time to make certain that desired results are going to be achieved. You can use the five levels of the Organizational Elements Model to verify adequate alignment of e-learning activities with desired results, and the eight dimensions of e-learning systems to provide a complete outlook. In addition, by asking important questions around each of these, you can estimate the readiness of your organization for e-learning success. The 20 essential questions provided above are only a starting place in planning for successful e-learning; add your own questions for each of the eight dimensions—and remember to align all that you use, do, produce, and deliver with valuable contributions to clients, external partners, and society.

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The Mid-Term Tune-Up

Getting Student Feedback Before it is Too Late

Natalie B. Milman

INTRODUCTION

I was extremely disappointed with this course. I don't feel I got all I could have/should have out of this class. I felt like I was going through the motions of being there.

Have you ever read a comment like the one above on one of your course evaluations, often months after you have taught a course?



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How did it make you feel? If you are like me, reading such a comment was quite frustrating. It was frustrating not only because I found it hard to believe that a student would end any course feeling this way (how could he or she go through the motions without asking for help, how did I not realize that there was a student that I was not “reaching”?), but also because it was too late to do anything for this student or to change what I was doing.

This comment, from a course evaluation of a class I taught in 2001, made me realize that I needed to do something to garner feedback from my students *before* the end of the semester. Therefore, I decided it was time to develop a strategy to solicit feedback from my students—at the mid-term—before it was too late. That way, I would be able to address their concerns, and even change the course, to meet my students’ needs, if necessary.

WHAT IS THE MID-TERM TUNE-UP?

The “Mid-term Tune-up” is an evaluation tool for requesting feedback from one’s students at the mid-term (well, it could be used any time during a semester or workshop), and not just at its completion, as is the case with most courses and workshops. Just as every car needs a tune-up to see what is working well and what needs to be

repaired, so do most classes and instructors! The Tune-up typically consists of two questions, although I occasionally add one or two additional questions. Table 1 contains the prompt and questions of a Tune-up I used recently. A question that I have begun to include more recently (see Item #4 in Table 1) asks students whether or not they give me permission to share their responses in a publication or conference, while also emphasizing that their permission or refusal to share their comments will not affect their academic standing. I plan to add a request for inclusion in my own digital portfolio in subsequent Tune-ups. (NOTE: This is for Institutional Review Board purposes, as well as to inform my students about how I might use their responses). I inform all of them also that their responses will be shared with the class. In cases where a student might post an inflammatory remark about another

student, I will delete the reference to the student in question.

I developed the idea based on some approaches I had learned about at the University of Virginia Teaching Resource Center (see <http://trc.virginia.edu/home.htm>) while a doctoral student and graduate instructor. The first approach that influenced the development of the Tune-up, the “one-minute paper” (see Magnan, 1991, for a description), was an excellent approach to use in my face-to-face (F2F) classes, but not in my online ones, particularly those taught asynchronously. And, although a second approach that I discovered, “anonymous feedback” (see Martini, 1998) could be developed easily for my online students, I found it to be too open-ended for what I wanted to learn from my students. Specifically, I wanted to learn what was working well for my students and what was not. Another approach, the “mid term

Table 1
Mid-Term Tune-Up Prompt and Questions

Just as every car needs a tune-up to see what is running well and what needs fixin'— so do most courses/ instructors. I would like to know what you believe is running well with our class and what needs fixin' by completing the answers in this “survey.”

NOTE: This is anonymous and voluntary.

1. What's running well? (What most helps you learn in this class?)

 2. What needs fixin'? (What impedes your learning, and how can realistic improvements or changes be made?)

 3. Please write any other things you'd like to share here.

 4. I give Natalie Milman permission to share my anonymous comments in future publications in scholarly journals or educational conferences. I understand that my permission or refusal to share my comments will not affect my academic standing at The George Washington University.
 - a. Yes, I give Natalie Milman permission to share my comments in future publications in scholarly journals or educational conferences.
 - b. No, I do NOT give Natalie Milman permission to share my comments in future publications in scholarly journals or educational conferences.
-

evaluation" (see Loevinger, 1993) seemed to fit what I had hoped to learn from my students, although the questions were different and, as a former elementary school teacher, I just had to make the idea more "interesting" for my students. So, the Mid-term Tune-up idea was born!

WHAT TOOLS ARE AVAILABLE FOR CREATING MID-TERM TUNE-UPS?

For the past few years, I have used Zoomerang (see <http://info.zoomerang.com/>), an online survey tool, for administering the Mid-term Tune-up. I maintain a free account with Zoomerang. It allows me to develop a survey with up to 30 questions for as many as 100 respondents. The data are available (which I copy and paste to word processing or HTML editing software) for up to 10 days. After ten days, to access the responses, I would have to upgrade to one of its subscriptions (which are much more expensive than not having to pay anything!). Many other online survey tools exist, such as SurveyMonkey (see <http://www.surveymonkey.com/>) and Question-Pro (see <http://www.questionpro.com/>), among many others. The features vary from tool to tool, but many offer a free version, or at least a free trial version that you can test out. I use Zoomerang because it was one of the first online survey tools available for free and it continues to serve my purposes for a simple, easily accessed online survey tool. It is easy to modify previously created surveys. Plus, although I know how the tool works, it is very easy to use.

WHAT HAVE I LEARNED FROM THE MID-TERM TUNE-UP?

I have learned many things as a result of using the Mid-term Tune-up in my classes over the past few years, not only about my students but also about my teaching. I have learned, for instance, that some students have felt overwhelmed by some of the work I assign, hated a particular text, and/or did not like working in groups.

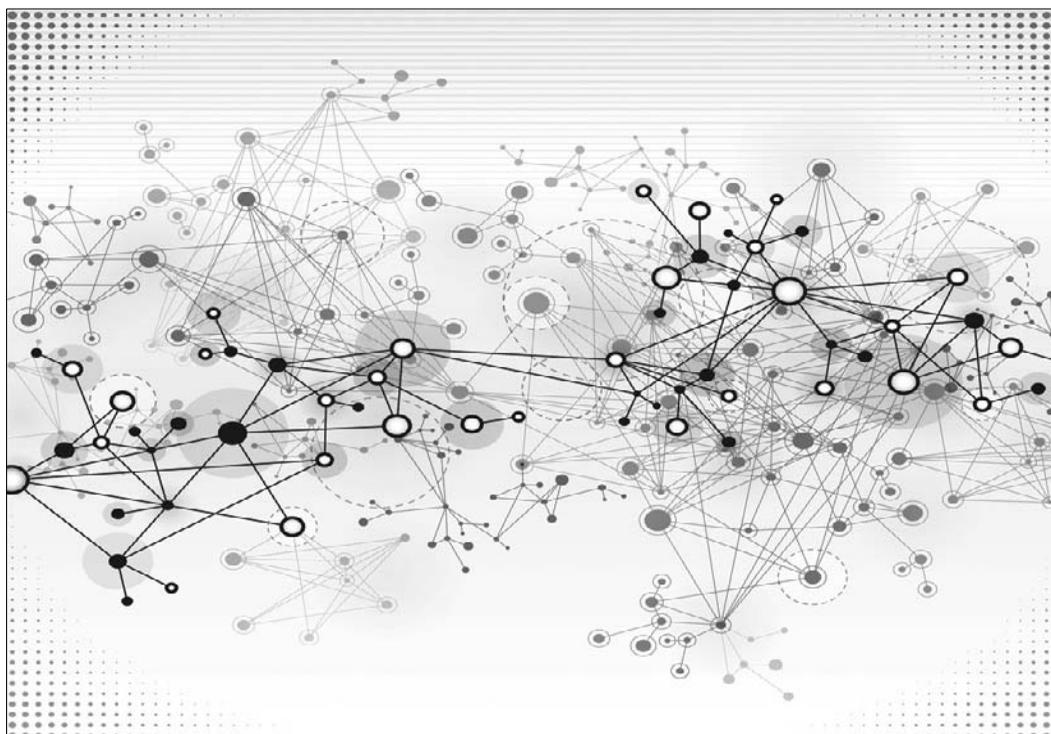
Some of these things I could not change, whereas others I did not want to change. More importantly, the Tune-up provides a means for my students to communicate with me about what helps and impedes their learning, in a risk-free way.

For my online courses, I always provide feedback in written format as a PDF file that may be downloaded from one week's lecture. Although at times redundant, I make sure to respond to each comment. In my F2F courses, I always share the students' responses as a handout and then discuss realistic solutions with the students.

I do not know if it is having over a decade of teaching under my belt or the Mid-term Tune-up, but I am finding that, like my end-of-semester course evaluations, the Mid-term Tune-ups tend to be generally very positive. In places where I can make changes, I make them. In areas in which changes cannot be made, I explain why. Perhaps it is this simple communication in a risk-free environment that has helped to improve things all around, as well as my teaching and my students' learning!

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Turning Common Conversations Into Consulting Contracts

Ryan Watkins

Consulting takes on many forms in today's organizations. From traditional external consultants who join an organization to assist on specific projects to the modern internal consultants who often sell their services to many organizational units, consulting has become an

essential ingredient to the business model of many organizations. As part- or full-time consultants, moonlighters, entrepreneurs, internal advisors, or external partners, consulting offers many professionals a range of unique opportunities to share their ideas and expertise with new organizations. Consulting, in any of these forms, can often help organizations improve their performance and lead to exciting opportunities for everyone who is involved.

Opening the doors to new opportunities isn't, however, always an easy process or one that can be mastered from reading a few good books. Experience is an essential ingredient to success in sales, whether is it selling learning management software or a conceptual framework for designing effective e-learning courses.

At conferences, on airplanes, in the classroom, and even on vacation, it is often easy to find people who are interested in the concepts and ideas that we have developed over our years of professional service. But turning those interesting conversations into consulting contracts is tricky at best. Based on this premise, I have found it useful to talk with experienced professionals who have nurtured many



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interesting conversations into very exciting consulting opportunities.

Recently, I took the time to ask a friend and colleague a few questions about his strategies for turning casual discussions into consulting dollars. Beyond his role as a faculty member at Florida State University's prominent program for instructional systems, Roger Kaufman has provided a variety of consulting services for hundreds of organizations that surround the globe. Many of clients are among leading corporate organizations (such as, Motorola, Microsoft, Chase Manhattan Bank, Shell Oil, IBM) while others provide everyday products that we all enjoy (like, M&M Mars or the March of Dimes). His clients also include small companies in South America as well as large government clients in countries from Australia to Germany. Based on these experiences and his many successes a consultant, I asked Roger for some suggestions and tips for turning colleagues into clients.

Ryan: At conferences and other events, experienced professionals are often invited into discussions and asked for advice only to discover that turning those conversations into consulting contracts it is more difficult than expected. What general advice can you offer colleagues who are looking to turn those discussions into consulting dollars?

Roger: Listen to the potential client and identify both what they are asking for and what they should ask for. Be ready to offer something unique and also that which will add measurable value to them.

Ryan: Are there any tactics that you use early in conversations to illustrate for potential clients just how much information or advice you are willing to share with them at no cost and what ideas they will have to pay for in a consulting contract?

Roger: Find some area of your experience and theirs that overlaps. Build a con-

nection based on common ground. It can be over the topic at hand or geography. This helps you "humanize" the interaction.

Ryan: How do you balance between offering potential clients enough information that they will become interested in your consulting services, without providing them with so much advice that they no longer require your services?

Roger: I don't worry about giving them too much information. If a simple conversation can help them be successful, that is fine. It is only if I can actually add value to their organization that I want to work with them.

Ryan: There are many sales seminars and videos on "closing the deal." What techniques do you use when trying to get potential clients to write a contract for services?

Roger: Tell them you would like to work with them and ask them to identify how they see you contributing.

Ryan: What type of potential clients do you find most difficult to move from good conversation toward a consulting contract?

Roger: Ones who already have the solution fixed in their minds. If they are not open to defining and justifying their problems and opportunities before rushing into a solution, I don't want to work with them.

Ryan: Do you recommend that consultants set their initial fees at a high amount and use reductions in those fees as a tool to motivate potential clients into offering a contract?

Roger: First, determine how much you want to work with the client. Then give your usual fee (unless you have a different charge scale for educators, NGOs, etc.) and if you think it is too high, let them know that you are open for discus-

sion if that doesn't fit their budget requirements.

Ryan: What sales or marketing advice would you give new professionals who are interested in offering consulting services to organizations?

Roger: Peter Drucker differentiates between "selling"—when nobody can actually use what you have—and "marketing" where there is an overlap of what you can deliver and what the client can really use. Market. Don't lie, don't cut corners. Charge what you are worth, and never do anything to just get the money. Never.

Ryan: How important are follow-on contracts to consultants in distance learning and related fields?

Roger: Important, but don't string people out with partial help in order to keep up the cash-flow.

Ryan: What characteristics do you find most organizations are looking for in the consultants they hire?

Roger: Most, unfortunately, are looking for someone who strokes them and their pre-existing solutions. At the end of the day, they want success and you have to find if you can contribute to their success while not compromising your ethics.

Ryan: What, if any, resources would you recommend new professionals review when preparing to offer consulting services to organizations in their field?

Roger: I would have them look at the Organizational Elements Model (OEM) and identify how you can help them align and link all of the elements.

Ryan: What additional questions on this topic should I have asked?

Roger: How much am I going to charge you for this interview.

Note: Thanks again to Roger Kaufman for volunteering to share the wisdom of his experience. Any opinion, findings, and conclusion or recommendations expressed in this material are those of the author and do not necessarily reflect the view of the National Science Foundation.

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Dimensions of a Comprehensive Needs Assessment

Ryan Watkins

Within most traditional problem-solving frameworks, practical decision making starts with either a formal or informal assessment of “needs.” These initial assessment processes are the preliminary steps in determining the performance criteria by which alternative solutions can later be evaluated and

selected. To facilitate this critical step in problem solving, needs assessments typically identify and prioritize discrepancies between the current and desired accomplishments. And these assessments are most valuable when you define “needs” solely as the gap between what results should be accomplished and what results are currently being accomplished without discussion of disparities in resources, inputs, processes, or other means.

In organizational practice, however, needs assessments are often informally skirted when organizations immediately respond to a request (for example, “we need xyz training program,” “I need a new computer,” or “we need more distance education courses”) with either a causal analysis or a course development process while the yet-unverified need continues to be assumed as a performance problem.

By assuming, and neither measuring or validating that the “need” identified in the request is actually a reflection of a discrepancy between the results that are expected to be achieved and those currently being achieved, the problem-solving and decision-making processes begin without adequate justification. Not only may the “need” be exaggerated, misunderstood, or



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miscommunicated, the “need” may actually be a strength or asset when measured. But without a systematic assessment process, the assumed “need” drives decision-making rather than allowing for measurable evidence and clear criteria to be the drivers for a successful intervention.

As a result, a comprehensive and systematic needs assessment process is necessary for practical decision making. Comprehensive assessments are defined on multiple dimensions, including a first dimension that requires that the assessment collect evidence that includes both hard and soft data; hard data being those that are independently verifiable and soft data being those that are not independently verifiable. For the assessment process, this distinction of data (rather than the traditional qualitative and quantitative differentiation) is of greater value, since it is the ability to validate the data that is essential to making good decisions (more so than the tools and techniques used to classify the data).

A second dimension for a comprehensive assessment is that it must address results at three levels of focus: societal, organizational, and individual/small group. At the societal level the assessment focuses on the *outcomes* and contributions

of the organization to the community at large (i.e., clients, clients’ clients, and others). The organizational level of a comprehensive assessment examines the *outputs* of the organization, and at the individual/small group level the assessment observes the distinct *products* of individuals or teams (Kaufman, Oakley-Brown, Watkins, & Leigh, 2003). Only when all three levels of results have been included in the assessment can problem-solving processes adequately align the types of results to be accomplished with the distinct beneficiaries of those results.

A third dimension is the comparative relationship of the current results being accomplished (i.e., What Is) with those that desired or required (i.e., What Should Be). This relationship of results is essential for identifying discrepancies and ties the assessment process to the long-term strategic directions of the organization. By collecting data during the assessment that addresses both the current achievements and the necessary achievements for long-term success, the assessment’s data can be most valuable during decision-making (specifically, providing the required data for the next three dimensions of comprehensive assessment).

Table 1
Six Dimensions of a Comprehensive Assessment

Dimension	Characteristics
Data verification	Hard and Soft (i.e., externally verifiable and not externally verifiable)
Results focus	Outcomes/Societal, Outputs/Organizational, and Products/Individual
Comparative	What Should Be (i.e., desired or required) and What Is (i.e., current)
Needs and strengths	Relationship of data regarding What Should Be and What Is
Spread	Size of the discrepancy between What Should Be and What Is
Perceived priorities	Relative relationship of strength or need to others identified during data analysis

A fourth dimension of comprehensive assessments is the inclusion of both needs and strengths in the analysis of data. By comparing data collected with regards to the results that should be accomplished with the data concerning what results are to be achieved, the assessment can define both the strengths and the needs of the organization. When the desired or required results are greater than those currently being achieved, then a “need” exists. Likewise, when the desired or required results are being achieved (i.e., the data regarding “What Is” are equal to or greater than the data regarding “What Should Be”), then a “strength” has been identified.

By identifying both needs and strengths in the single assessment, decision-makers can better determine how to prioritize resources. Many strengths can be leveraged to help close needs. Some strengths may be maintained and monitored, just as some needs will be monitored and closed at a later time. In any case, having the availability of data for comparing data regarding the current accomplishments and future requirements is valuable to most any problem solving process.

A fifth dimension of a comprehensive assessment that supports useful decision-making is identifying the spread of data between What Should Be and What Is. The greater the differential between data supporting these two states (i.e., future requirements and current accomplishments) then the more attention decision makers should likely pay to the associated strength or need. This isn't to say that strengths or needs defined by small discrepancies are any less important than those defined by larger differences, but the size of the strength or need as defined by the data from the assessment should be included in the analysis of the data as a key variable in a problem-solving process.

The final dimension of a comprehensive needs assessment is the prioritization of a strength or need as defined by its relative

position to other strengths or needs. For example, if an assessment included survey data from employees (identifying perceived discrepancies in results) on a Likert-type scale, and responses indicated that there was a need with regards to customer service support with an average What Is score of 1 and a What Should Be score of 3; And the survey indicated that employees perceived another need with technical support, scoring What Is at 3 on average and What Should Be at 5. Then, in problem solving, decision-makers may want to consider that employees view the size (or spread) of the needs as roughly equal (2 points on a Likert-type scale), although they perceive that the need related to technical support is more critical given its higher position on the scale relative to the customer service support need.

By collecting and analyzing data along all six dimensions of comprehensive needs assessment, the assessment process can better support valid and useful decision-making. A dual-matrix assessment design (with data being collected for both What Should Be and What Is) is one way to develop assessments that are capable of supporting these six dimensions (see Kaufman, Watkins, & Leigh, 2001).

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Note: Any opinion, findings, and conclusion or recommendations expressed in this material are those of the author and do not necessarily reflect the view of the National Science Foundation.

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Developing E-learning Activities

Ryan Watkins

Imaginative ideas can lead to engaging, interactive, and meaningful learning experiences ... and this is equally true for learners in either the traditional classroom or the online classroom. Creative ideas are not, however, always easy for us to come up with when we are designing, developing, or teaching online courses. While most of us can see the bene-

fits of including engaging activities in our e-learning courses, the ideas (and the details) for how those can be developed and integrated often escape us (Watkins, 2005).

To introduce learners, stimulate discussions, increase interactions, challenge presumptions, and achieve a host of course objectives, e-learning activities can be used throughout most any online course. From ice breakers to informal assessments, and from online debates to guest speakers, we can use activities in our online courses to engage learners and develop active learning.



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WHAT ARE E-LEARNING ACTIVITIES?

Online courses do not have to be digital correspondence courses that include few opportunities for interactivity and engagement. In contrast, online courses can effectively use Web technologies to facilitate e-learning that is exciting, interactive, purposeful, and beneficial for online learners.

E-learning activities use online technologies, such as chat rooms, discussion boards, or e-mail, to facilitate interactions among e-learners in meaningful exercises related to the course. Much like the activi-

ties and games used in traditional classroom training, e-learning activities can be used by instructors and trainers to accomplish a variety of goals, such as introducing learners to one another, sharing experiences, benefiting from team learning, increasing participation, or encouraging learners to develop constructive online relationships throughout the course (Watkins, 2005).

For many e-learners and e-learning instructors, the online classroom is a new environment that requires a variety of technology skills and communications strategies that are not the same as those used in previous classroom experiences. Consequently, while developing and teaching online courses, we have a tendency to forget that the e-learning classroom can (and should) offer engaging and interactive learning experiences.

Many e-learning activities can be adaptations of the training games used in traditional classroom instruction, and other activities can use the unique aspects of the online environment to develop distinctive activities for online courses. By including these interactive e-learning experiences, you should be able to improve retention rates, increase learner participation, achieve your learning objectives, develop online learning communities, and ensure that your online courses engage learners, regardless of the course topic.

HOW CAN YOU DEVELOP E-LEARNING ACTIVITIES?

Developing e-learning activities does not have to be difficult or time-consuming. There are, however, a few considerations that should be made before selecting an activity to use in an online course:

- a. Are the learners in the course experienced e-learners?
- b. Am I experienced with facilitating interactive e-learning?

- c. What technologies are available for facilitating the course's activities?
- d. Do the learners have the technical skills to use these technologies effectively?
- e. What pre-activity exercises would help prepare learners?
- f. How much time do I want to use for the activity?
- g. How much time do learners set aside for participation in the course?
- h. What learning objectives do I want to achieve through an activity?
- i. What other goals do I want to achieve through an activity?

After considering these important issues, you should brainstorm the types of activities that will best achieve your goals and objectives. It is often helpful to reflect on activities you have used in traditional classroom courses to achieve similar goals, and to recall some of the positive training experiences you have been through as a learner. From these experiences you can begin to list the potential activities that would be valuable in your online course.

For example, here is a short list of e-learning activities that may be helpful in sparking some creative ideas (sample activities from Watkins, 2005):

- *Let Me Introduce*: Based on an activity that is commonly used in traditional classroom courses, this online adaptation has learners interviewing other learners and posting online introductions of their partners.
- *Websites About Myself*: Taking advantage of the unique resources available to online learners, this activity lets learners introduce themselves by identifying Websites that illustrate their interests and backgrounds.
- *Playing Roles in Groups*: By assigning group members to interesting and challenging roles within group discussions (for example, idea proposer, disagreeer, devil's advocate, questioner, naysayer,

example giver, clarifier, tension reliever, discussion leader, note taker, online resource finder, or conflict negotiator), you can use this activity to add diversity to course discussions.

- *In the News*: This activity capitalizes on the number of newspaper and magazine articles available online to bring discussions of current events into online courses.
- *Group Blogs*: Much like course journals, online blogs can be used as an effective e-learning activity for encouraging learners to work together in reflecting on course experiences.

When you have selected an activity, either one from the traditional classroom that you want to adapt for online learners or a completely new activity that uses the unique tools of the technology, you will then want to plan for successful implementation. In planning for implementation you will want to consider the following:

- a. what tasks you will have to complete as an instructor prior to starting the activity (for example, emailing out instructions, forming groups, establishing chat rooms),
- b. what learners will have to do in preparing for the activity (for example, reading course materials, downloading software, identifying partners),

- c. what are the logistical steps that will be necessary for both you and the learners to participate effectively in the activity (for example, when you will post the instructions, how often will learners participate, what will happen if a partner does not participate), and
- d. how you will assess the participation of learners in the activity (for example, will the number of postings to the discussion board be important, will you review the content of all discussion postings, will learners summarize their interactions).

SUMMARY

E-learning activities can turn rather dull online experiences into entertaining, interactive, meaningful, and valuable learning experiences for learners; and getting the creative ideas for online activities does not require hours of meditation. By using adaptations of activities you are familiar with from the traditional classroom, along with imaginative ideas that take advantage of the unique online technologies, you can create e-learning activities that will both excite and engage learners.

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Building Skills for E-Learning Success

Ryan Watkins

For many, the years spent sitting behind desks in both academic and training classrooms have molded their perceptions of what learning is, where learning takes place, and how to be successful. From these perceptions, many of us have actually become quite effective in our skills for interacting, learning, and assessing our progress from behind the

desk of the traditional classroom environment. E-learning, however, typically challenges each of these perceptions about learning and, as a result, the transition from the traditional classroom to the online classroom can be difficult for many learners.

In response, e-learning courses can (and should) offer learners both the opportunities and resources that are necessary to build useful learning strategies, skills, and techniques for adapting to the online classroom. By building on the achievements of “student success” programs (like those offered at more than 800 colleges and universities in the United States), e-learning courses and programs can achieve improvements in both the persistence and achievement of learners. According to Joe Cuseo (n.d.), professor of psychology and Director of First-Year Seminar at Marymount College, student success courses, tutorials, lectures, and activities have been shown to increase student retention, improve academic performance, and raise the number of students progressing toward graduation.

These programs, which typically focus on developing both study habits and life-long learning skills, can also be adapted for online learners to improve the odds of their retention and achievement. For



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online educational programs and corporate training alike, the success of e-learners is central to their goals and objectives, and the persistence of learners toward the completion of online courses is therefore a necessary requirement for success. Online courses cannot, however, always depend on the study skills and learning strategies that learners bring from the traditional classroom to translate into success in online courses.

While technologies have changed many aspects of how learners study and how courses are taught, the metrics of persistence and performance continue to be used by institutional decision-makers in defining success. Consequently, it is both to our benefit and the benefit of the learners to design online courses that include components intended to improve the study skills of e-learners. From course activities that develop time management skills to examples of effective online communication strategies, as instructors we can help learners develop functional e-learning study skills as an integrated part of our curriculum.

For most online learners, the development of effective study skills is critical to their achievement and retention (i.e., their success and our success). After all, "[s]tudents enrolling in an e-learning class must not only master the course's subject matter but also possess the technical skills to participate in the course and study effectively" (Arabasz, Pirani, & Fawcett, 2003). And, while many traditional study habits can be adapted for application in online courses, the development of new high-tech learning skills is also necessary for e-learning success (Watkins, 2004; Watkins & Corry, 2005).

For online instructors, concerns of student readiness for distance education are central to how we plan and deliver online courses. While many learners come with remarkable skills for searching retail Websites and downloading music from the Internet, few have experience or knowl-

edge of how to effectively use online technologies to advance their studies.

In a report prepared for Educause, Morgan (2003) affirmed that, despite the popular myth that students are technologically savvy and converse mainly through instant messaging and e-mail, the study illustrated that faculty members discover that many students are not proficient with technology. As a result, building skills for communicating effectively when using e-mail, synchronous chat rooms, or asynchronous discussion boards, are among the basic study skills that many online learners must adopt to be successful in the high-tech classroom. While formal courses or tutorials on developing e-learning study skills may be a desirable first option, most of us (and our students) can not afford to wait for the development of comprehensive courses or tools.

In lieu of a formal study skills program (e.g., course, tutorials, mentoring), I suggest that we should build into our course lectures, activities, and assignments a number of strategies and techniques to improve the study skills of learners. For example, this can be done by including models of useful note-taking strategies in the course materials or by designing activities to require the application of effective online communication skills for their completion.

For instance, instead of requiring learners to merely submit a paper at the end of an assignment, instructors can require within the assignment the demonstration of effective note-taking skills, appropriate outlining techniques, or the use of peer-review strategies. In another course, learners could contribute to the rules and policies that will be used to structure the course's synchronous or asynchronous online discussions. By involving learners in the development of guidelines related to online etiquette and protocols, e-learners can be given the opportunity to reflect on the other strategies they will be using to

communicate online with their peers and instructors.

For every course there is a variety of techniques that can be used to incorporate the development of effective e-learning study skills. By adding these to the design of our online courses, we can often improve both the retention and performance of our e-learners. As an alternative to more formal and independent study skills courses or tutorials, this is one option we have for improving the capacity of learners to successfully make the transition from the traditional to the online classroom.

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Defining Success

Ryan Watkins

Like beauty, success is in the eye of the beholder. As a result, success can have a thousand definitions.

In our many roles as distance educators, we must therefore determine how we can be successful in an environment that is characterized by the many perspectives that define our success. How can we improve the odds that our president or CEO will view our distance learning project or initiative as a success? How can we ensure that learners will leave our courses believing,

and sharing with others, that we have been successful in our objectives? What can we do to improve the feelings of success our team members and instructors have each time a new course is pilot-tested and released?

Answering these and other questions related to our success requires that we unwrap our current beliefs about what it is that makes us successful; and view our success from the many perspectives of those who will later be evaluating our success.

The definitions of success—as well as the related criteria for evaluating success—for any distance learning course, program, or initiative—will vary greatly based on the individual perspective of the evaluator. For the instructor, learner, program administrator, technical support staff, college president or CEO, current or future supervisor of the learner in the workplace, and others who either have an influence on the distance learning experience or who are affected by the results of the experience, the criteria that will be used to define the success of distance learning typically include a range of variables that we will want to consider as we design, develop, and implement any distance learning project.

To begin, let's face it; most perspectives of success are developed with little data to support the conclusions. Personalities, politics, agendas, and other variables often



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play an equal or greater role in determining the generalized success of distance learning initiatives than do the numbers. And when data are considered, more often than not most of the data will be soft data (or data that are not independently verifiable). Even as some hard data (or data that are independently verifiable) regarding learner results, retention rates, learner evaluations, or return-on-investment may be considered, many of the variables that will be used to develop a perception of success are not those that are clearly identified in the visions, missions, goals, and objectives of the project.

Distance learning initiatives, as well as many other professional activities, are often evaluated on criteria that are not those developed by the project team, leader, or instructor. Yet, as leaders we can (and must) take steps to ensure that we have defined success based on the many perspectives and definitions of success that may later be used to develop formal or informal evaluation criteria.

The question thereby becomes, if we are to be successful in the eyes of the many stakeholders in our distance learning project, then how do we ensure that we are addressing their criteria when we are designing, developing, and implementing? Fortunately, most often we won't have to please a thousand masters. Some perspectives on our success will have a higher priority than others. For example, knowing what criteria the president or CEO will use to determine your success is often a priority. In addition, many perspectives of success will commonly share similar criteria; making it possible for you to be successful from the perspective of the president or CEO at the same time as from the viewpoint of the learner.

From each perspective, however, the criteria for success will typically include variables that we may or may not have addressed from our perspective and role. For example, retention, learning, costs, political implications, cultural changes, test

scores, graduation rates, and transfer of skills, may be variables that we have failed to include in defining success from our perspective.

To ensure the success of our distance learning initiative, we will want to make certain that we have designed and developed the distance learning system to meet all (or at least most) of the definitions that will be used to determine its success, and consequently our success as well. We can start expanding our definition of success by first identifying all of those individuals or groups inside and outside of our organization who may have a role in evaluating our success.

From the multiple perspectives of success, we can then determine those that are valid, how to assign priorities, and what strategies we can use to balance competing interests that may become apparent. It is by identifying, understanding, and addressing the criteria of success from multiple perspectives that we can better ensure that the initiative is going to be as successful as possible from all perspectives.

When we don't identify, and therefore don't address, the criteria that will be used to judge our success from any one or more of these perspectives, then we are at risk of unnecessary obstacles and barriers to achieving our goals as well.

For instance, imagine that you have been asked to develop an online technical course for your organization or institution. In developing the course, you will want to consider the many partners in the project who will later be developing a perspective on the success of the project. For example, what criteria will future learners in the course use to define success? What are the criteria your supervisor will use when evaluating the project? Does your supervisor's perspective and related criteria differ from that of his or her superiors, the board of directors, or CEO? How will learner performance in the workplace be utilized to determine the success of the project? And what other individuals in the organization

or institution will be in a position to develop an influential perspective on your success?

Like any system, distance-learning initiatives are complex; and, while it is unlikely that we can create a system that meets the criteria to be a success for everyone who will evaluate the initiative (formally or informally), we can take steps to ensure that we are addressing the perspectives in a systematic manner.

In developing any distance learning course, program, or initiative, a results-focused needs assessment is an essential planning tool that should be utilized. By using the needs assessment process as a means for exploring what results are necessary for future success, you can tap into the definitions that others will be using to evaluate the performance of the system.

At the same time, during the needs assessment and related planning processes, you can also proactively generate success criteria for the project; criteria that are created based on the mosaic of perspectives you have examined during the assessment. By focusing all of these efforts solely on the results to be accomplished, rather than the processes to be implemented, you can further use the needs assessment to guide later evaluations of success (even if you have altered your implementation plans to address new technologies or unforeseen barriers).

As a result, the definitions for success of the distance-learning project are not on what you will do, but what results you will accomplish ... and how those accomplishments address the multiple perspectives of success that will sooner or later be used to define the evaluation criteria of your success.

Performance and Performing

Ryan Watkins

In most of our discussions about distance learning the distinction between what we *do* and what we *accomplish* is often overshadowed by talk of the latest technology innovations or tactics for increasing our market share. If you are like me and many others, you find that it is typically more stirring to talk about a new software application or techniques used to

increase learner participation, than it is to define the results distance learning is going to deliver for the organization and its external clients, as well as how you should go about evaluating your success. In general, most of us prefer to talk about *performing* rather than *performance*.

Nevertheless, our success is most often judged by our *performance* and not our *performing*. After all, we don't reward cows for standing over the bucket, nor do we reward sales people for keeping a client on the phone all afternoon if it doesn't result in a sale. The same is true in distance education and e-learning; although the processes we use are important, we do not want to be distracted by the number of courses we have online, the latest options in streaming media, or the number of learners we have enrolled. Even if most of us can't be successful without high levels of *performing*, the true value and benefit of distance learning solutions are the *results*, or *ends*, accomplished both in the online classroom and on-the-job.

By clarifying the distinction between *performance* and *performing*, we can influence how we define success and the likelihood that we will achieve it. For many of us involved in training, education, and performance improvement, the focus has traditionally been on the behaviors of our-



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selves and others. This has been done based on the assumption that increasing the efficiency of *performing* (i.e., productivity) will automatically lead to improved effectiveness and valued *performance* (i.e., results). Unfortunately, the relationship between *performing* and *performance* is often thwarted by misguided expectations, inadequate resources, moving performance targets, and other organizational managerial nightmares.

In response, we have experimented with measuring discrete variables of behavior, developing distance learning programs, evaluating employee morale, reengineering processes, moving training to be just-in-time, and a barrage of other well-meaning efforts; always remaining focused on improving how we *perform*, while rarely defining and measuring the required *performance*. For example, we commonly count the number of hits our distance learning Websites have each month or the number of hours in which we have content streaming through satellites, all the while very few of us evaluate our success beyond end-of-course exams or surveys of learner satisfaction.

Complementing our current evaluations of *performing* with the assessment of *performance* is essential for enduring success of distance learning initiatives. Organizational resources will not be expended in the long-term on initiatives that do not demonstrate measurable results for the organization, its clients, and its clients' clients.

Isolating and measuring the results contributed by training and education programs within an organization is essential. This requires, in addition to assessing how

we are *performing*, that we measure our *performance* in terms of the results accomplished through distance learning outside of the online classroom. For example, learner performance on the job, learner contributions to departmental achievements, organizational accomplishments, as well as the success, safety, and satisfaction of the clients and the clients' clients.

Performance, when defined as the results of an individual or organization, can be the true measure of success for any distance learning programs. Distinguishing what we *do* from what we *accomplish*, offers training professionals and educators a valuable and unique perspective that is useful when defining criteria for program success, requesting additional funding, making difficult decisions, evaluating accomplishments, designing distance learning courses, and when trying to keep one step ahead of the competition.

Without forgetting the necessity for high levels of *performing*, distance-learning initiatives can benefit from clearly denoting the distinctions between *performance* and *performing*. In other words, the distinction between Ends and Means.

NOTE

The *Ends and Means* column is based on a feature written by Roger Kaufman throughout the 1980s for the Performance Improvement Journal of the International Society for Performance Improvement. His articles each month informed and inspired many professionals, and it is my goal to continue his tradition of performance-focused articles through my contributions to *Distance Learning*.

students some wonder how to manage the learning environment. Those who advocate equivalency theory have a guideline for this issue: identify those strategies that are used for management in traditional classrooms and find an equivalent—not identical—strategy to use in a distance education class. For example, teachers have long used the proximity technique for classroom management; they walk up to and stand close to students to get their attention—the proximity technique. What is the equivalent strategy to use at a distance? Perhaps it is virtually paying close attention to a student—contacting them in an unusual way such as the telephone, or asking a very specific question and requiring an answer quickly—the virtual proximity technique.

Time management is another area of concern for many distance teachers. Once again, time management is often misunderstood. Almost all school, college, and university classes have some form of time limits—minimally the school term or college semester. One indicator of a well-designed distance education course is the type of time structure provided by the teacher or professor for the student. Group reports, due dates, activity logs, and assignment deadlines are the hallmarks of effectively organized courses, distant or traditional. Certainly, some courses have little structure and few due dates; these classes probably fall into the category of “poorly designed.”

Motivation of distant learners is another concern. Perhaps the problem is about whom or what is responsible for motivating. Motivation is most likely a characteristic of a person—some of us are always motivated and some seem never to be motivated. The psychologists call this the “trait of motivation.” Instructors want to motivate students to do their best in a class, so

teachers design strategies that foster a kind of motivation—the “state of motivation.” The assumption is that the teacher probably can not change learners, but instructors can design strategies that require a student to act motivated. Examples include requiring work in learning communities of seven, regular graded assignments, routine and specific feedback, and the expectation that artifacts of learning be submitted. The teacher motivates by planning, interacting, and requiring; all contributing to the greatest educational motivator there is—the grade.

Finally, there are *best practices*. Classroom management in traditional courses is obviously different than management of an online course. Once again, there is one place where distance teachers should start when organizing their online classes; what the literature says about organizing and managing a traditional class. We do not need to start over; rather, the instructor of a course delivered to students at a distance should refer to the “tried and true” techniques of traditional education and with this foundation identify equivalent strategies. We know that 20 students is the optimum, so 20 is what should be a best practice. We know that learning communities are best when about seven students are in a group, and we know that regular and frequent interaction contributes to student success, maybe because of the motivating factor of knowing the teacher is near. Best practices are there, we just need to apply them.

And finally, the well-trained educator is the key to success in any educational setting, traditional or distant. Beware of those who would have us forget what is known.

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Questions Asked and Answered

Michael Simonson

Frequently asked question (FAQ) lists are everywhere. So, we have joined the bandwagon. This issue of *Distance Learning* gives a number of answers to practitioners' questions. Here are more.

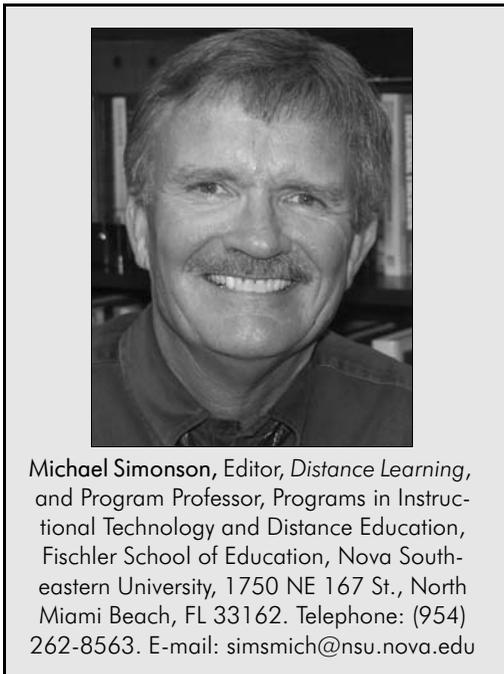
First, there are questions about the ideas of *independence and autonomy* of distance learners. Moore (2013) has written about these two concepts repeatedly and

eloquently. Unfortunately, many have not read Moore's work, and apply their own interpretations to these terms. In short, distance learners can be autonomous and are often independent. However, there is no requirement that every learner must be autonomous and independent. In other words, the designer of online instruction must make assumptions about learners when instruction is planned. Autonomy and independence are variable and should be design considerations. For example, considerable course structure requires less autonomy and independence.

Next there are questions about *class size*. MOOCs have clouded the facts about class size. Writers have observed that tens of thousands of students can enroll in a single class, thus creating a massive lecture. However, the literature on class size is quite clear. One instructor can successfully manage about 20 students in a class—distance delivered or traditional. When class size significantly exceeds this number a new classroom management strategy is needed, such as the use of teaching assistants, the implementation of teams of instructors, or the dividing of the class into subsections.

Managing distance education is another area that is often questioned. Since instructors cannot see or directly interact with

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