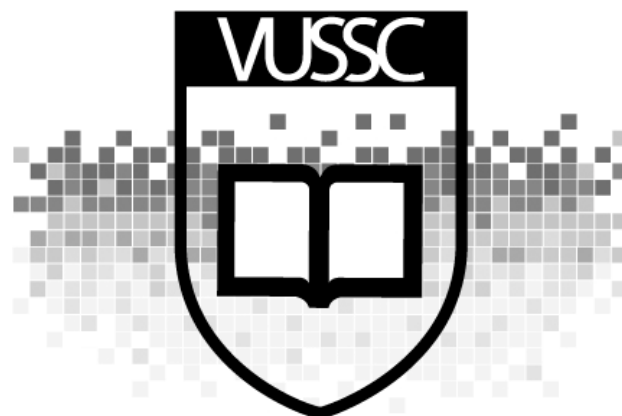


Training Educators to Design and Develop ODL Materials

A Facilitator's Guide



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What is the Commonwealth of Learning (COL) Virtual University for Small States of the Commonwealth (VUSSC)? VUSSC provides some of the smallest countries with stronger economic opportunities through improved access to quality education. Through the VUSSC, learners from island nations in the Caribbean, Pacific, Mediterranean and the Indian Ocean, as well as small countries in Africa, gain online access to open educational resources (OERS) designed to meet the development needs of participating countries. These non-proprietary course materials are used in the offering of credit-bearing qualifications at post-secondary institutions in the participating countries, strengthening their educational capacity and outreach. The courses will eventually be made more widely available for adaptation and use.

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DRAFT

About this Facilitator's Guide

The Training Educators to Design and Develop ODL Materials: A Facilitator's Guide has been produced by The Commonwealth of Learning (COL). All facilitator's guides produced by The Commonwealth of Learning (COL) are structured in the same way, as outlined below.

How this Facilitator's Guide is structured

The overview

The overview gives you a general introduction to the workshop. Information contained in the overview will help you determine:

- If the workshop is suitable for you.
- What you will already need to know.
- What you can expect from the workshop.
- How much time you will need to invest to complete the workshop.

The overview also provides guidance on:

- Study skills.
- Where to get help.
- Workshop assignments and assessments.
- Activity icons.
- Modules.
- Basic Facilitation skills.

We strongly recommend that you read the overview *carefully* before starting your study.

The workshop content

The workshop is broken down into modules. Each module comprises:

- An introduction to the module content.
- Module outcomes.
- New terminology.
- Core content of the module with a variety of learning activities.
- A module summary, as applicable.
- Web-based resources and further reading, as applicable.

Resources

For those interested in learning more on this subject, we provide you with a list of additional resources at the end of each module; these may be books, articles or web sites.

Your comments

After completing the Training Educators to Design and Develop ODL Materials: A Facilitator's Guide, we would appreciate it if you would take a few moments to give us your feedback on any aspect of this workshop. Your feedback might include comments on:

- Workshop content and structure.
- Workshop reading materials and resources.
- Workshop assignments.
- Workshop assessments.
- Workshop duration.
- Workshop support (assigned tutors, technical help, etc.)

Your constructive feedback will help us to improve and enhance this workshop.

Workshop overview

Welcome to Training Educators to Design and Develop ODL Materials: A Facilitator's Guide

Welcome to this facilitator's guide. It contains exciting materials for conducting a workshop to train educators to develop Open and Distance Learning (ODL) resources. As you navigate through this document you will find materials needed for planning and conducting sessions for training educators in the development of ODL learning resources. These materials have been designed so that they can be used for professional development as well as for personal knowledge.

The facilitator's guide is divided into sections. How one navigates through the guide is a matter of preference. This can be done by working through the sections in order or selecting sections that are relevant to your specific needs or interest. If appropriate, you may wish to check with your colleagues or workshop leader to decide how the sections should be prioritized.

Training Educators to Design and Develop ODL Materials: A Facilitator's Guide—are these materials for you?

This facilitator's guide is intended for people who are expected to train educators with little or no ODL understanding/experience to design and develop ODL materials.

Workshop outcomes



Outcomes

Upon completion of the Training Educators to Design and Develop ODL Materials: A Facilitator's Guide you will be able to:

- *Train* educators in the design and development of ODL materials.
- *Explain* the principles of ODL to participants.
- *Help* participants develop skills in the use of relevant technologies.
- *Explain* various instructional design models to participants.

Timeframe



How long?

Duration: 3 days (face-to-face workshop)

Modules 1-11 of this workshop is designed to be run according to the proposed schedule outlined below. Module 12 is significantly longer than the other modules and can be run as a separate workshop according to the schedule in Figure 2 below:

	Duration (mins)	Day 1	Day 2	Day 3
Session 1	90	Principles of ODL	Methods of Delivery	Relevant Technologies
Break	15			
Session 2	90	ID Models	Content Development Methodology for ODL	Course Evaluation
Lunch	60			
Session 3	90	Needs Analysis	Types of Assessment in ODL	Other key issues associated with ODL material development
Break	15			
Session 4	90	Developing Learners' Profile	Developing a Student Guide	Workshop evaluation and official closing

	Duration (mins)	Day 1	Day 2	Day 3
Total:	450 min/22.5 hours			

Figure 1 – Time schedule for Modules 1-11

	Duration (mins)	Day 1	Day 2	Day 3
Session 1	90	What is a facilitator? Knowing your group Feedback	Active listening	Valuing people
Break	15			
Session 2	90	Creative teaching techniques	Leadership	Dos and Don'ts
Lunch	60			
Session 3	90	How to facilitate active learning I	Teamwork	Workshop evaluation and official closing
Break	15			
Session 4	90	How to facilitate active learning II	Conflict resolution	
Total:	665min/11 hours			

Figure 2 – Time schedule for Module 12

NB: Module 12 could be compacted into two days

Study skills



As an adult learner your approach to learning (and those of the participants in your workshop) will be different to that from your school days: you will choose what you want to study, you will have professional and/or personal motivation for doing so and you will most likely be fitting your study activities around other professional or domestic responsibilities.

Essentially, you will be taking control of your learning environment. As a consequence, you will need to consider performance issues related to time management, goal setting, stress management, etc. Perhaps you will also need to reacquaint yourself in areas such as essay planning, coping with exams and using the web as a learning resource.

Your most significant considerations will be *time* and *space* i.e. the time you dedicate to your learning and the environment in which you engage in that learning.

We recommend that you take time now—before starting your self-study—to familiarize yourself with these issues. There are a number of excellent resources on the web. A few suggested links are:

- <http://www.how-to-study.com/>

The “How to study” web site is dedicated to study skills resources. You will find links to study preparation (a list of nine essentials for a good study place), taking notes, strategies for reading text books, using reference sources, test anxiety.

- <http://www.ucc.vt.edu/stdysk/stdyhlp.html>

This is the web site of the Virginia Tech, Division of Student Affairs. You will find links to time scheduling (including a “where does time go?” link), a study skill checklist, basic concentration techniques, control of the study environment, note taking, how to read essays for analysis, memory skills (“remembering”).

- <http://www.howtostudy.org/resources.php>

Another “How to study” web site with useful links to time management, efficient reading, questioning/listening/observing skills, getting the most out of doing (“hands-on” learning), memory building, tips for staying motivated, developing a learning plan.

The above links are our suggestions to start you on your way. At the time of writing, these web links were active. If you want to look for more go to www.google.com and type “self-study basics”, “self-study tips”, “self-

study skills” or similar.

Need help?



Help

Before beginning the course you should familiarise yourself with how you can get help. For example you may want to ask the registrar the following questions:

Is there a course web site address?

What is the course instructor's name? Where can s/he be located (office location and hours, telephone/fax number, e-mail address)?

Is there a teaching assistant for routine enquiries? Where can s/he be located (office location and hours, telephone/fax number, e-mail address)?

Is there a librarian/research assistant available? Where can s/he be located (office location and hours, telephone/fax number, e-mail address)?

Is there a learners' resource centre? Where is it located? What are the opening hours, telephone number, who is the resource centre manager, what is the manager's e-mail address)?

















Who do learners contact for technical issues (computer problems, website access, etc.)

Getting around this Facilitator's Guide

Margin icons

While working through this Facilitator's Guide you will notice the frequent use of margin icons. These icons serve to "signpost" a particular piece of text, a new task or change in activity; they have been included to help you to find your way around this Facilitator's Guide.

A complete icon set is shown below. We suggest that you familiarize yourself with the icons and their meaning before starting your study.

			
Activity	Assessment	Assignment	Case study
			
Discussion	Group activity	Help	Note it!
			
Outcomes	Reading	Reflection	Study skills
			
Summary	Terminology	Time	Tip

Before the Workshop

Pre-Workshop Activities

Introduction

This section is intended to be used as a guide in assisting instructors in successfully planning and delivering workshops on open and distance learning (ODL). It focuses on the pre-workshop activities that need to be considered for the effective execution of any workshop. It is anticipated that given the diverse contexts/environments in which workshops will be conducted, adaptations, additions and amendments may be required.

The objectives of the Pre-Workshop Activities module are to:



Outcomes

- *Provide* workshop planners with a checklist to guide course development and implementation.
- *Keep* planners on track during the planning phase.
- *Enhance* competencies/skills in planning and executing workshops.
- *Contribute* towards the development of a workshop planning template.
- *Provide* a reference map during the planning process.
- *Sensitise* planners to the need for incisive planning.
- *Ensure* the improvement in the quality of workshops.

Before the workshop

Before conducting a workshop you should ensure that:

- Workshop has been approved and budget secured.
- The programme duration and structure has been determined.
- The target group has been identified and notified.
- Allowances/transportation costs have been accommodated.
- Review and completion of the pre-workshop checklist (Figure 3).

- A venue and materials have been confirmed.

THE PRE-WORKSHOP CHECKLIST

Area	Activity	Completed <input checked="" type="checkbox"/>
1. Needs Analysis	<ul style="list-style-type: none"> ▪ Pre-test instrument has been developed. ▪ Pre-test instrument has been implemented. ▪ Pre-test data has been analysed and results compiled. ▪ Course content has taken pre-test results into account. 	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
2. Design and Development of Course Content	<p>Rationale is clearly stated.</p> <p>Objectives:</p> <ul style="list-style-type: none"> ○ are clearly stated. ○ are measurable. <p>Instructional strategies:</p> <ul style="list-style-type: none"> ○ are varied to meet learning needs. ○ are appropriate to the content. ○ are adaptable to the content. <p>Delivery methods:</p> <ul style="list-style-type: none"> ○ are audience friendly. ○ are based on andragogical principles. ○ take into account the use of technology. <p>Activities:</p> <ul style="list-style-type: none"> ○ are well-designed and do-able. ○ are linked to learning objectives. ○ take into account different learning styles. ○ provide opportunities for individual and group interaction. <p>Evaluation strategies have been identified.</p>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
3. Workshop Materials	<ul style="list-style-type: none"> ▪ Materials have been identified and procured such as hand-outs, CD-ROMs, web-based materials, workshop timetable, etc. ▪ Materials have been prepared and packaged. ▪ Adequate quantities of materials have been prepared. ▪ Copyright issues have been addressed. 	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>

Area	Activity	Completed <input checked="" type="checkbox"/>
4. Workshop Presenters/ Facilitators	<ul style="list-style-type: none"> ▪ Workshop presenters have been engaged. ▪ Alternates have been identified. ▪ A presenter's/facilitator's guide has been prepared and distributed. 	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
5. Workshop Materials	<ul style="list-style-type: none"> ▪ Stationery: folders, writing materials, etc. have been secured. ▪ Flip charts, markers, media equipment, etc. have been secured. 	
6. Facilities and Resources	<p>Venue:</p> <ul style="list-style-type: none"> ○ is suitable and accessible. ○ has appropriate furniture and equipment. ○ is well-ventilated and lighted. ○ is technology-friendly. 	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
7. Administrative and Technical Support	<ul style="list-style-type: none"> ▪ Support staff is in place for registration and distribution of materials and general operations. ▪ Technical support is available on site. 	<input type="checkbox"/> <input type="checkbox"/>
8. Catering	<ul style="list-style-type: none"> ▪ Catering arrangements have been finalised. ▪ Special needs participants have been catered for. ▪ Catering time schedule has been fixed. ▪ Disposal arrangements are in place. 	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
9. Workshop Formalities	<ul style="list-style-type: none"> ▪ Media releases have been prepared and sent. ▪ Invitations have been sent out to officials and other relevant personnel and the media. ▪ Banners and promotional materials have been secured. ▪ Opening ceremony agenda has been finalised. ▪ Guest speaker has been invited. ▪ Protocol measures have been put in place. ▪ Certificates have been printed and signed by appropriate official. 	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
10. Recording of Workshop Proceedings	<ul style="list-style-type: none"> ▪ Still and video photographers have been contracted. 	<input type="checkbox"/>
11. Workshop Evaluation Documents	<ul style="list-style-type: none"> ▪ Workshop evaluation instruments have been prepared and include: <ul style="list-style-type: none"> ○ Evaluation of modules; ○ Workshop evaluation and ○ Personal reflections. 	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>

Figure 3

Determining Content for Workshops

Decision-making inputs about content:

- Profile of target group
- Duration of workshop
- Objective(s) of the workshop
- What must participants:
 - Know; and
 - Be able to do at the end of the workshop
- Planned activities (group and individual)
- Instructional strategies

Module 1

Principles of Open and Distance Learning (ODL)

Introduction

Very often we think of ODL in the context of education that is formatted for a specific audience in this new age of technology and advance telecommunications. We invite you to consider some of the activities that we have all been part of that we might not consider with the ODL context at this point.

Everyday activities that are examples of ODL scenarios:



- 1 Sharifah is from Belize. She is married to a Namibian named Dennis and they live in Canada. Dennis has been to Belize and ate Curri Snails that Sharifah's grandma made the old-fashioned way. Now he wants to eat this same dish. He figures that since he does not have snails he can use crabs. Sharifah does not know how to make the snail meal and she certainly does not do it with crabs. Grandma died so Sharifah calls her mother (who is living in California) for help.
- 2 A nine-year old is at home with his mother. She clutches her throat but makes no sound. The child quickly calls 911. The operator, sensing that there is no time to send an ambulance,

quickly instructs the child to put the telephone on speaker and do exactly as the operator instructs. The child is coached to administer CPR and the parent is saved.

Upon completion of this module you will be able to:



Outcomes

- *Relate* ODL to everyday life experiences.
- *Provide* a forum and guidance for user exploration of personal and perceived definitions of ODL.
- *Examine* formal definitions of ODL.
- *Create* a working definition of ODL.
- *Explain* the usage of ODL concepts in:
 - i formal training;
 - ii information settings; and
 - iii professional development activities.
- *Enhance* the participants' knowledge of the benefits of ODL.
- *Differentiate* between face-to-face delivery and ODL.



Terminology

What is ODL?:

Open and distance learning (ODL) combines two forms of education – open and distance – that focus on expanding access to learning. It is characterized by two factors: its philosophy and its use of technology.

Most ODL systems have a **philosophy** that aims to:

- remove barriers to education
- allow learners to study what they want, when they want and where they want.

In short, ODL is about increasing educational **access** and increasing educational **choice**.

ODL systems typically use technology to mediate learning, for example:

- printed workbooks, radio, audio cassettes, and the web

- Examples:
1. Correspondence courses where learners study for professional qualifications and degrees.
 2. Interactive radio instruction in primary schools, where classroom-based students learn from studio-based teachers.
 3. Open learning systems using workbooks, study centres and online conferencing to enable working adults to gain school-leaving credentials.
 4. Web-based courses used to update technical staff in the workplace.
 5. Distance learning courses to upgrade classroom teachers without their having to leave their classrooms.

ODL Use

1. Formal Training
 - Structured arrangements that provides a systematic approach to the acquisition of credits
 - Needs some form of bureaucracy
 - Certificate, diploma and degree programmes
2. Informal Training
 - Personal development (e.g., IT courses, cooking courses)
 - Community support (e.g., developing course in areas where the community is lacking a skill like computer literacy)
 - Social development (e.g. courses on governance, globalisation, social change or materials on social capital)
3. Professional Development
 - Improvement of qualifications
 - Self-actualisation – the instinctual need of humans to make the most of their abilities and to strive to be the best they can.

Applicability

ODL materials are applicable in:

- Levelling of the “playing ground”
- Accessibility
- Affordability
- Continued development
- Social stability (i.e., brain drain and cultural denigration)

Face-to-Face delivery vs. ODL



Face-to-Face	ODL
 <p data-bbox="528 770 839 864">Each island can have a certain specialty. On their own they are separate.</p>	 <p data-bbox="900 777 1422 840">ODL can bring all these specialties together to create one common good.</p>
<p data-bbox="528 898 619 927">Better?</p> <ul data-bbox="528 972 863 1093" style="list-style-type: none"> • More personal • Face-to-face interaction with a teacher 	<p data-bbox="900 898 986 927">Better?</p> <ul data-bbox="900 949 1418 1252" style="list-style-type: none"> • Teleconferencing/videoconferencing allows for personal interaction • Caters for different learning styles • The introvert may be more involved because they can type without fear of intimidation • Breaks the barriers of learning • More variety in the learning experience
<p data-bbox="528 1279 639 1308">Location</p> <ul data-bbox="528 1335 850 1397" style="list-style-type: none"> • Limited to participants in the setting 	<p data-bbox="900 1279 1007 1308">Location</p> <ul data-bbox="900 1335 1406 1397" style="list-style-type: none"> • Open and distance learning provides a broader scope
<p data-bbox="528 1431 759 1460">Facilitator/Teacher</p> <ul data-bbox="528 1487 820 1550" style="list-style-type: none"> • Physically present – hence more control 	<p data-bbox="900 1431 1126 1460">Facilitator/Teacher</p> <ul data-bbox="900 1487 1353 1572" style="list-style-type: none"> • Not physically present • Can minimize student distractions
<p data-bbox="528 1599 619 1628">Setting</p> <ul data-bbox="528 1659 836 1805" style="list-style-type: none"> • Normally confined to one location • Pace determined by lecturer 	<p data-bbox="900 1599 986 1628">Setting</p> <ul data-bbox="900 1659 1445 1888" style="list-style-type: none"> • Allows for more independent learning • Learner-oriented – ability to work at your own pace • Asynchronous – allows learners to participate and complete material in accordance with their daily commitments

Figure 4



Group Activity

In small groups, derive a contextual definition of ODL (this creates ownership and personal value).

Invite participants to create:

User-generated definitions of ODL

- User interpretation of ***Open Learning***
 1. When you hear the term “Open Learning” what is the immediate thought that comes to your mind?
 2. Does the term have anything to do with openness to learning?
 3. Is “Open Learning” reflective of learning in the open?
- User interpretation of ***Distance Learning***
 1. When you hear the term “Distance Learning” what is the immediate thought that comes to your mind?
 2. Does the term reflect anything relating to space and location?
 3. Is distance a requirement for this type of learning?
- ***Open and Distance Learning***
 1. Does the term reflect merely the combination of Open Learning and Distance Learning?
 2. Is there more to this than the mere combination?
 3. What unique quality does this combination suggest?
 4. Is this type of learning different from the traditional type of learning in your environment?

Engage the participants in a scenario evaluation of ODL situations worldwide (based on the user definition and the dictionary definition).

Scenario 1: Hassan is the Senior Operator of DHIRAAGU substation in Seenu Atoll which is located in the southern tip of Maldives. He does not want to leave his job and move to the capital Male’ to do his Masters degree. However, he feels strongly he must continue with his studies. Is ODL the best solution?

Scenario 2: Mele Lami is an untrained primary school teacher with five children all under the age of seven years. She is one of only three teachers teaching at the Primary School of Tafahi, a village situated on the island

of Niuatoputapu. The school is made up of approximately 150 students ranging in age from five to six years old. Mrs. Lami wants to upgrade her teaching qualification so that she may be eligible for a promotion. However, she cannot leave her five children behind to take up the two-year diploma programme at the only Teacher's College in Tonga, which is located on the main island of Tongatapu. Nor can she leave the students under the care of just two teachers. The only way that Mrs. Lami will be able to study for her diploma in teaching would be through distance learning. Would ODL work in this situation?

Web Resources

Principles of ODL presentation (PowerPoint):

http://www.wikieducator.org/images/7/74/PRINCIPLES_OF_ODL.odp

Principles of ODL Handout:

http://www.wikieducator.org/images/0/0f/Principles_of_ODL.pdf

Module 2

Instructional Design Models

Introduction

As educators we are all accustomed to devising instructional design for the delivery of our face-to-face courses. Although instructional designs differ for the two modes of delivery – face-to-face and ODL – they are all linked to the various theories of learning such as *conditioning* and *cognitive processing*. In this module, you will be exposed to various instructional design models most of which involve the process of analysing learner profiles and goals; the development of a delivery system to meet the learner profiles; the development of content; piloting the content and evaluating and refining the materials if needed. In addition, the module explains some emerging concepts in eLearning such as content driven learning, process driven learning and interaction that affects the nature of your approaches in designing instruction for eLearning and the types of computer software, such as mind maps that are available to assist the design process. Finally you are provided with a comprehensive guide for developing ODL materials.

Upon completion of this module you will be able to:



Outcomes

- *Define* instructional design.
- *Define* key concepts in instructional design.
- *Identify* theories of learning used in instructional design.
- *Differentiate* between the different types of instructional design models.
- *Explain* the importance of the different design models for the web.
- *Use* basic instructional design guidelines to design instruction.

Type of Design Models



Group
activity

Assemble yourselves into small groups (2-3 people per group) and list at least three (3) factors to consider when designing instruction for your face-to-face class. As we go through this module, we will compare our lists.

This activity can also be done individually.

Introduction

So what is instructional design?



Terminology

Instructional Design
(ID):

From Wikipedia – Instructional design is the practice of arranging media (communication technology) and content to help learners and teachers transfer knowledge most effectively. The process consists broadly of determining the current state of learner understanding, defining the end goal of instruction, and creating some media-based "intervention" to assist in the transition. This systematic approach provides a step-by-step process for the analysis of the learners' needs, the design and development of training materials, and the evaluation of the effectiveness of the training intervention.

In recent years, more than 100 instructional design models have been proposed by different theorists and experts in the field of distance education. However, most have been based on the foundation created in the "ADDIE Model". Whatever the ID model, it makes use of the underlying principles of the popular learning theories. These learning theories include behaviourism, constructivism, social learning and cognitivism; they help shape and define the outcome of instructional materials.

**Tip**

As you work your way through the design models below, ask yourself the following questions:

- Who are my learners?.....**Learner Profile**
- What are their needs?.....**Goals and Objectives**
- What tools do I need?.....**Content**
- How can I solve their needs?...**Strategy**
- Is the strategy working or should I change it?...**Evaluation and Revision**

The ADDIE Model

The ADDIE model's five phases – Analysis, Design, Development, Implementation and Evaluation – represent a dynamic, flexible guide for building effective training and performance support tools.

One commonly accepted improvement to this model is the introduction of a feedback loop. This is the idea of receiving continual or formative feedback while the instructional materials are being created (this is often called 'formative evaluation'). The introduction of this phase helps to save time and money by catching problems while they are still easy to fix.

In the ADDIE model, each step has an outcome that feeds into the subsequent step.

1 ANALYSIS:

In the analysis phase, the instructional problem is clarified, the instructional goals and objectives are defined; the learning environment is identified; and a clear understanding of the "gaps" between the desired outcomes or behaviours and the learner's existing knowledge and skills is identified. Below are some questions that are addressed during the analysis phase:

- Who is the audience and what are their characteristics?
- Identification of the desired outcome or behaviour.
- What types of learning constraints exist?
- What are the delivery options?
- What are the pedagogical considerations?
- What is the timeline for project completion?
- What exactly is the (performance) problem? How do you know there is even a problem? Why is it a problem?

2 DESIGN:

This step deals with the selection of an instructional approach, learning objectives, assessment instruments, exercises, content, subject matter analysis, lesson planning and media selection. The design phase should be systematic and specific.

The steps used for the design phase include:

- Documentation of the project's instructional, visual and technical design strategy.
- Application of instructional strategies according to the intended outcomes.
- A description of the problem.
- Creation of storyboards.
- Designing the user interface and user experience.
- Creation of a prototype.
- Application of a visual or graphic design.

3 DEVELOP:

The development phase is where the developers create and assemble the content assets (materials, resources, technologies, tests etc.) that were created in the design phase. Technologies, if applicable, are developed and/or integrated. The project is reviewed and revised according to any feedback given.

4 IMPLEMENT:

During the implementation phase, materials are distributed to learners and a procedure for training the facilitators and the learners is developed. The facilitators' training should cover the course curriculum, learning outcomes, method of delivery, and testing procedures. Preparation of the learners include training them how to use new tools (software or hardware, if appropriate), and learner registration.

This is also the phase where the project manager ensures that the books, equipment, tools, CD-ROMs and software are in place, and that the learning application or Web site is functional (if appropriate).

5 EVALUATE AND REVISE:

The evaluation phase consists of two parts: formative and summative. Formative evaluation is present in each stage of the ADDIE process. The summative evaluation determines the adequacy of the distributed materials in achieving the course objectives and provides opportunities for feedback from the users.

You may also wish to visit the following site which outlines the

advantages and disadvantages of the ADDIE Model:

http://www/e-learningguru.com/articles/art2_1.htm

Alternative Design Models

The ADDIE model has been criticized by some as being too systematic, that is, too linear, too inflexible, too constraining, and even too time-consuming to implement. This has led to the development of newer design models that emphasize a more holistic, iterative approach to the development of training. Rather than developing the instruction in phases, the entire development team works together from the start to rapidly build modules, which can be tested with the student audience, and then revised based on their feedback. This section highlights the main features of four of the more popular alternative models.

Below are descriptions of alternative ID Models (including some common devices related to each type of theoretical approaches).

A printable version of this page can be found at

http://www.wikieducator.org/images/3/39/Alternative_ID_Models.pdf

1 *Dick and Carey Design Model*

The Dick and Carey (1996) model uses a systems approach for designing instruction:

- starts by identifying instructional goals
- ends with summative evaluation
- focuses on specific objectives
- similar to that of software engineering.

2 *Hannafin and Peck Design Model*

The Hannafin Peck model (1987) uses a three phase process

Phase 1: perform a needs assessment

Phase 2: design

Phase 3: develop and implement instruction

N.B. All the phases involve a process of evaluation and revision.

3 *Knirk and Gustafson Design Model*

The Knirk and Gustafson model (1986) also uses a three stage process:

Stage 1: identify the problem and set instructional goals

Stage 2: design and develop objectives, set instructional objectives and specify strategies

Stage 3: develop materials

N.B. this can be used for individual lessons or modules; focus is on evaluation and development seems to come late in the process.

4 *Kemp Design Model*

The Kemp model (1994) uses an holistic approach to instructional design:

- Includes all factors in the learning environment – subject analysis, learner characteristics, learning objectives, teaching activities, resources (computers, books, etc.), support services and evaluation;
- Focuses on:
 - learner needs so the process is constantly under revision (iterative)
 - content analysis
 - support
 - service

N.B. this model can also be used for individual lessons.

Theories of learning used in instructional design

As mentioned earlier, any instructional design model that has been developed is somehow related to one or more learning theories such as behaviourism, cognition, constructivism, information processing, etc.

Instructional design in an ideal world would be a simple matter of identifying learners' needs and goals and then creating some learning materials that enabled them to meet those goals. Such a statement presupposes that some theory exists to guide instructional designers in that process. What is the theory?

Behavioural approach: Gagné (1968) who stressed that the aim of instructional design was to create the particular conditions needed for a particular type of learning. Under this behavioural approach, he described, for example, the conditions that a student needed for learning things such as rules, concepts and problem-solving.

Cognitive approach: emphasizes design based on characteristics of individual learners.

Constructivist approach: emphasizes the learner's own activities as the mechanism for learning (Elen and Clarebout, 2001).

Although many writers today espouse the constructivist approach as the only one to use, any cursory perusal of ODL materials shows that instructional designers regularly make use of all three approaches. Some constructivist writers also acknowledge that other theories have their place: We believe that the initial knowledge acquisition phase is better served by instructional techniques that are based upon classical instructional design techniques. Classical instructional design is

predicated on predetermined learning outcomes, constrained and sequential instructional interactions, and criterion-referenced evaluation (Jonassen, et al., 1993). This judgment would seem to be supported by the practice of instructional designers. In fact the approach will depend on the learners' needs and abilities as well as the content and capabilities of the instructors. Hence, the analysis phase feeds all other phases.

Following is a summary of some devices and related theories. Note that what differs mostly between these theories is their philosophies rather than their methods of operation.

Type of Theory	Learning Devices Used
Behavioural	<ul style="list-style-type: none"> • learning objectives stated • tasks broken down into small steps • most tasks have clear right or wrong answers • learners assessed against the stated learning objectives • the learning package prescribes what is to be learnt
Cognitive	<ul style="list-style-type: none"> • learning objectives stated • task broken down into small steps • learners assessed against the stated learning objectives • a wide variety of tasks, but within the scope of the stated objectives • material is chunked into small, meaningful pieces • mnemonics are used to aid memory • advance organizers are used to help learners see the structure of the topic <i>(From Wikipedia - An advance organizer is information that is presented prior to learning and that can be used by the learner to organize and interpret new incoming information. NB: An advanced organiser is the literary equivalent of foreshadowing)</i> • simplification of real-world situations • the learning package tends to prescribe what is to be learnt
Constructive	<ul style="list-style-type: none"> • learner choice of task or situation • authentic, real-world tasks • case studies • complexity of the real world presented in the tasks • collaborative learning tasks • opportunities to learn from observing others (e.g., trainee teaching as observer in a classroom) • the learning package tends to be open-ended in terms of what is to be learnt • self-evaluation rather than formal assessment

Figure 5



*Get into new groups and think about your own learning environment.
How would you apply the learning theories to design instruction for your
specific course?*

Group Activity

Instructional Design and Learning on the Web

Emerging Concepts in e-Learning

Distance education has come to be known by many names such as e-learning, technology-enhanced learning, blended e-Learning, computer-mediated pedagogy and many others. This emerging method of delivering education encompassing many emerging fields in education that receive widespread attention from educators, researchers, teachers and practitioners all over the world. The number of national and international eLearning/computers in education conferences is increasing yearly where presenters expose lots of new and innovative ideas, revolutionary and sometimes controversial practices, and systems/technologies that have been developed to facilitate the implementation of these new modes of education.

What instructional designers need to remember is that the integration of technology in learning needs to enhance teaching and learning, rather than just being used as a new flexible delivery medium (Nichols, 2003). Used in this way, technology offers designers a new paradigm for learning.

The belief is that classic e-Learning through well-structured platforms, diffusion of content online with structured chapters and classic activities such as open-ended questions or multiple choice questions defeats the purpose of using e-Learning technologies to foster innovative pedagogies and to promote knowledge construction and autonomous development of the student (Santally & Senteni, 2004). The occurrence of successful learning in this module is therefore defined as a three-phased activity:

1. Knowledge Acquisition phase;
2. Knowledge Application Phase;
3. Knowledge Construction through Sharing and Reflexive Practice.

Learning is being re-conceptualised in the sense that course content is no longer the primary object of the activity. Content is now seen as a vehicle to help learners achieve the learning objectives, which might include skills acquisition, or other competencies that they need to develop. The framework that governs the setting up of this module is therefore based on the educational ecology concept (Santally, 2005) where teaching and learning is re-conceptualized as an activity framework governed by the following rules:

- *Self-Reliance*: Act using the resources available locally using a learning object repository for example.

- *Empowerment*: Enable subjects to react immediately to changing circumstances by having access to decision-making.
- *Interdependence*: It has been shown that adult learners learn as much (or more) from each other than they do from facilitators or educational materials.
- *Asynchrony*: Enable subjects to operate as quickly as possible, given local circumstances.
- *Reflexivity*: Enable critical thinking and creativity to continuously improve current practices.
- *Commitment*: Regulate social interaction, reciprocity and collaboration for knowledge construction and sharing.

Instructional Design and e-Learning Environments

Like the ADDIE and other models similar drawbacks exist in the traditional software but this has forced software engineers and researchers to adopt more contemporary models that would solve the problems encountered. While designing online courses, the following instructional design process should focus on three key inter-dependent components that would guarantee successful implementation:

- Pedagogy
- Technology
- Usability

Pedagogy



Case Study / Example

The Pedagogy-Technology-Usability Triad: *Content-based vs. Activity-based approaches*

Rich activity-based learning materials are meant to create more in-depth, integrated and applicable knowledge in different contexts (Schneider, 2003). In other words, people are thought to learn better from activity-based learning where learners physically engage with people and content rather than passive learning where learners simply try to “absorb” content.

The competencies that the learner could expect to acquire in activity-based learning would include **subject-specific** skills, **information technology** related skills and **general learning** skills. Please note that normally the subject-specific skills will consist of learning outcomes in the cognitive (mental skills), psychomotor (manual or physical skills) and affective (growth in feelings or emotional areas) domains.

Content-based approaches

In this section, we will use a course that has been developed at the University of Mauritius as an example. The CSE 1010E (Introduction to Information Technology) was initially delivered through print-based distance education and it became the first module to be delivered online at the University of Mauritius on a very large scale (~ 1000 students). The CSE 1010E module (Figure 6 below) has now been delivered without any major problems for four academic years. The module is hosted by the University of Mauritius Virtual Campus, which provides the technological infrastructure and pedagogical tools to enhance the teaching and learning process.

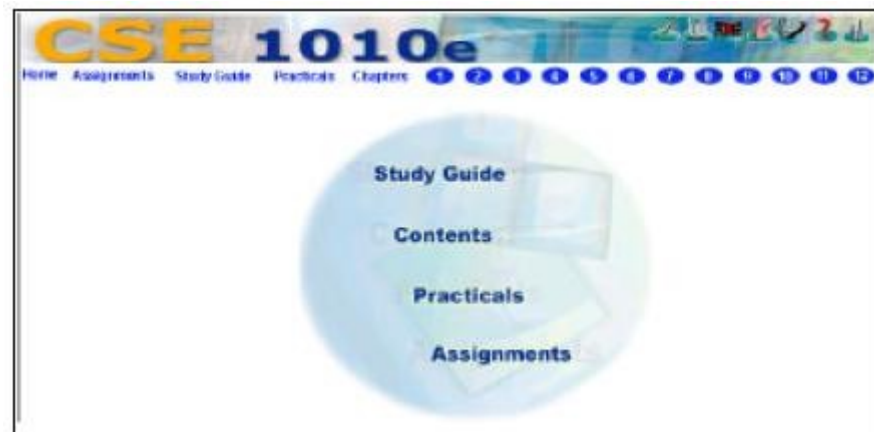


Figure 6 illustrates the 'home page' of an online module

Students have an online study guide (also available in print format) where they have access to an instructional plan that helps them in their learning. They get instructions about chapters to read and exercises to carry out. The contents section provides students with multimedia learning material arranged in a hypertext structure that helps them to understand concepts easily. Students also have access to a range of self-assessment questions for each chapter. The assignments and practical sections contain necessary information about continuous assessment and hands-on activities to be carried out in the computer lab. Students also have access to online discussion forums where they can communicate with peers and tutors about concepts and topics related to their module. Participation in online forums does count as part of the continuous assessment.

Designing this course involved traditional instructional design methodology and converting this module from traditional distance learning to eLearning was simply seen as a reproduction of the same material in electronic format i.e., only the delivery medium was changed. The only special skills needed were web design and usability which are normally carried out by the web communication designer and web multimedia developer and the instructional designer who oversees the process.

An evaluation of the module from a cognitive perspective (Santally & Senteni, 2004) revealed that the module was only an electronic version of the print-based distance education materials previously delivered to students. The module was only rated as average since it was obvious that the instructional design process for print-based material cannot be directly applied for eLearning courseware design. Even when the module was migrated to an online environment, the

contents, assignments and evaluation modes remained the same. In short, the behaviourist approach prevailed. Students in this case would prefer to print the materials to read since the content-based chapter-wise approach was used in the design of the module. As a result, the newer technologies were not seen to be adding to the learning process. Having students save html pages to print later at home would not be considered good pedagogical practice as it would be easier to give them PDF versions of the documents.

Activity-based Approaches

Using an activity-based approach, the instructional design is more centred on knowledge construction, socialization and collaboration based on a set of authentic activities. These activities will help the learners develop an understanding of the subject matter, formulate personal learning goals (depending on their professional interests) and the activities will also use a set of pedagogical and technological tools to support them in the process.

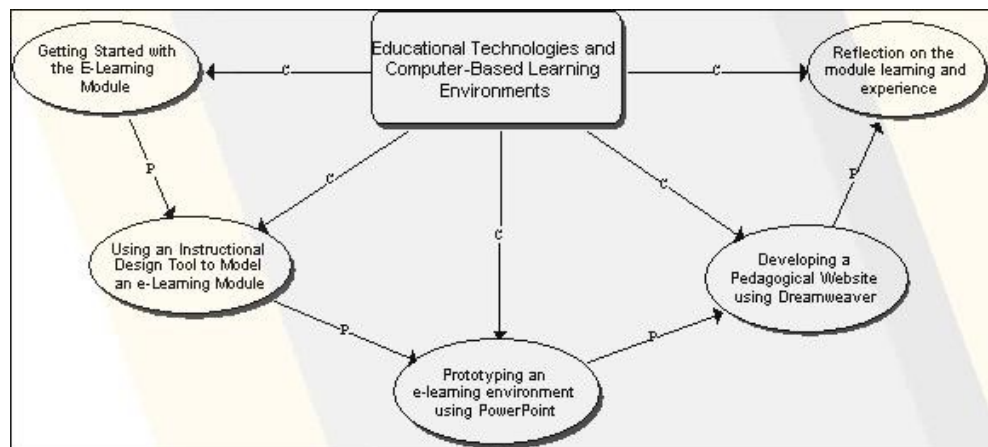


Figure 7 - Concept map of a module made up of structured pedagogical activities and scenarios.

The module shown above consists of five activities that need to be carried out sequentially throughout the semester (15 weeks). However, there is also a continuous assessment activity that consists of forum participation that is transversal to every other activity included in this module. Activity 1 (Getting Started) is not marked. However, since participation on the forum spans the entire module, student intervention in the forum for this activity is very important. All the other activities [24] carry equal weight in the assessment process. Activity 5 is marked similarly to Activity 1 in that the forum participation is essential to these two activities. Students who do not participate in the forum for these two activities will get no marks for forum participation even if they actively participate on other issues. Figure 8 below illustrates how the module is organized in terms of activities.

The guiding principles governing this approach rely heavily on a learner-centred approach, a focus on flexibility, autonomy and a commitment of the learner towards learning. While the learning activities should incorporate well-structured scenarios, the teacher is seen as a “facilitator, orchestrator and manager” (Schneider, 2003). However, a flexible approach needs to be adopted

while structuring the activities. For each activity, there is a tentative plan that is given to the student to guide him or her through the weeks over which the activity spans.

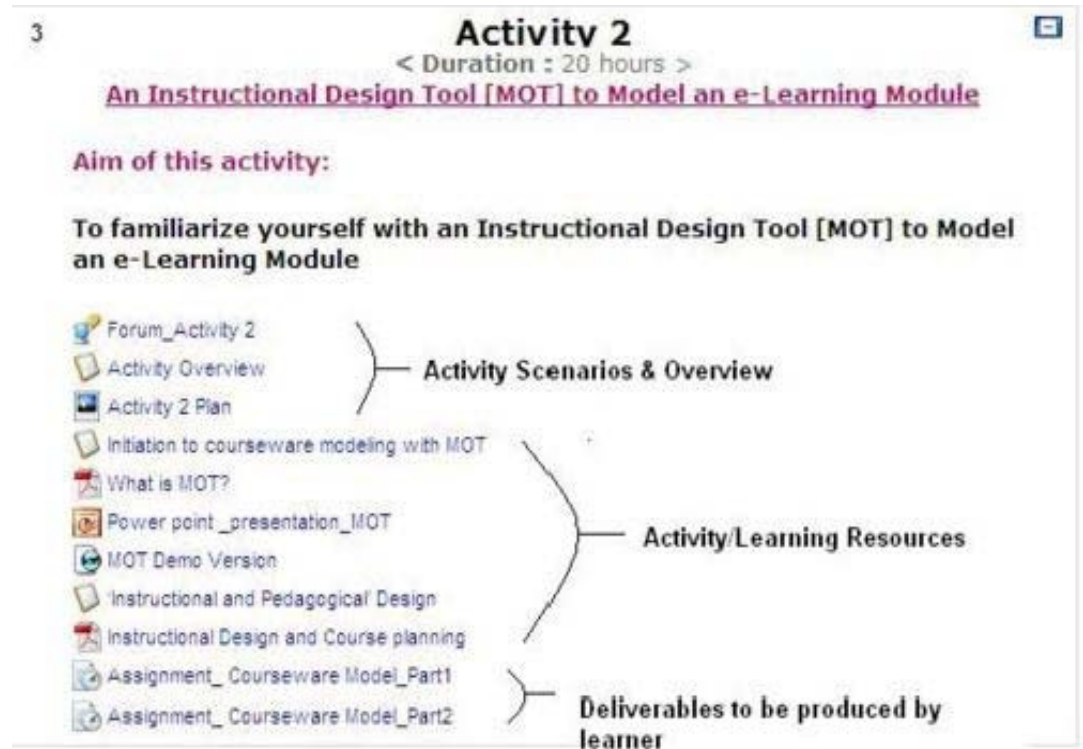


Figure 8 illustrates pedagogical structure of an eLearning activity

However, the student can change or adapt the plan according to his/her own preferences and decide on his/her own (usually negotiated with the teacher) how to allocate his/her time and effort on the different steps of the activity. The essential thing is that the student completes the learning activity and achieves the learning objectives.

Tasks	Modality	Week	Duration	Exchanges	Notation
2.1: Initiation to courseware modeling with MOT	Individual	2	7 hr	Forum : Modeling an e-Learning Module	None
2.2: Tutorial on Instructional and Pedagogical Design	Individual	2-4	7 hr	Forum : Modeling an e-Learning Module	None
2.3: Elaborate the courseware model	Individual	5-6	6 hr	Forum : Modeling an e-Learning Module	15 %

Figure 9 – Tentative activity plan suggested to the student

This case study is also available at http://www.wikieducator.org/images/0/07/Content_activity.pdf



Reflection

Think of your course as it is currently and reflect on the main pedagogical re-engineering that you would have to do if ever it had to be reconceptualised to suit an activity-based approach.

Technology

The technology component of an e-Learning course is a key factor to its success as its main role is to support the underlying pedagogy. In many cases, the technology drives the pedagogy which we believe is a mistake. Although there is a need to make sure that there is the right technology to support the pedagogy, it is always the pedagogical strategy that guides the technology to be applied. For instance, it is not because there is a Wiki tool that the teacher should use it in his course. If the teacher finds that a Wiki can bring added value in a particular aspect and is relevant to the context of his course, then he should do it. This kind of approach (that is of making sure to use every bit of functionality) is detrimental to the flexible and innovative nature that e-Learning brings in the process.

Another example is that of the Quiz editing facility common to most eLearning platforms and many educators. We know from personal experience that many educators make it a must to include quizzes in their courses. This is completely out of phase with the philosophy adopted in a project/activity-based learning approach. The final example that is worth mentioning is the online chat facility. While it is known that some educators involved in online learning and related areas would see to it that they organize regular (weekly) and structured chat

sessions, others may be more lenient on this basis. Making structured chats and marking that specific activity is analogous to taking attendance in the classroom! Nothing would have changed if the same practices are just reconverted and maintained in the e-environment. There is little we can say about innovation in such cases.

The technology used in an e-Learning module need not necessarily be completely electronic. It can be a combination of print-based, electronic through a CD-ROM and an online forum to discuss each activity. The print-based component can be a simple student guide on how to get started with the courseware. The print material also contains necessary instructions on how to use the different software and forums of the course. At this stage, it cannot be assumed that the student is familiar with the technological environment of the course. Getting started well with such a module is a critical success factor for the student.



Is it really important that an eLearning module be hosted on an integrated eLearning platform? Are there simpler alternatives that can provide more flexibility to the learner?

Reflection

Usability

The traditional distance education era gave rise to a new group of professionals called instructional designers. Their role has always been crucial to the success of manuals in terms of readability and understandability by students. They advised content experts how to better structure sentences, where to make a pause and ask a question and when to cut short a chapter and start the next. In the online environment, their role has been extrapolated to that of usability expert/engineer, as there is a need to **ensure optimal interactive experience** of the learner with the learning environment.

“Usability is often associated with the functionalities of the product (see Wikipedia ISO definition, below), in addition to being solely a characteristic of the user interface (cf. framework of system acceptability, also below, which separates usefulness into utility and usability).”

<http://en.wikipedia.org/wiki/Usability>

Usability is all about a paradigm shift from technology-oriented product design to user-centred design (Holzinger, 2005). The design of the interaction between the student, the machine, the courseware and the peers (fellow students and teachers) is a very important phase in the instructional design process. Usability engineering of a course should not be confounded with graphic design aspects of the website. Having high quality graphics, animations or sliding menus does not necessary result in a well-engineered course from a usability/human-computer interaction perspective. The practice of simplicity to maximize usability is a well-known factor (Nielsen, 1999). Usability consideration while

designing an online course has also many other implications of perception, memory and cognitive psychology. A courseware developer needs to be aware of individual differences since not all users are the same (Ayersman & Minden, 1995).

Usability applies to every single process from conception to implementation and testing of the module. It is an ongoing process that starts with usability engineering, applying usability heuristics during design, usability testing with users and starting the process over again in an iterative lifecycle.

While it is practically impossible for you to master human computer interaction principles here it is important that you know about it and the increasing importance it is having on the design of interactive educational environments.

Of course an educator who wants to write material to be delivered as an eLearning course need **NOT** be an expert in all three areas. An eLearning course requires a set of interdisciplinary skills that can be provided by different professionals. An eLearning courseware development team would normally consist of the:

- Content-Expert
- Instructional Designer (normally in most cases, he/she is the team leader for the project)
- Web Communication Designer (conceptual Design of eLearning environment)
- Web and Multimedia Developer (technical implementation)
- Computer/system Administrator (optional)



Tip

Remember . . . *the integration of technology in the process needs to be seen as a means to improve the teaching and learning practices and NOT simply as a new delivery medium*

For a summary presentation on emerging concepts in e-Learning, see http://www.wikieducator.org/images/d/d2/ID_Models.pdf

The process: A walk through the process of instructional design in eLearning

Whether you prefer your course to be content-based or activity-based, the basic principles apply. In this section, you will be guided through the instructional/pedagogical design of learning scenarios of an activity-based module named “Educational Technologies and Computer-based Learning Environments”. The module exists in two different eLearning versions. The first version is a ‘light-weight’ mainly ‘portable’ version while the second version is hosted on the Moodle e-Learning platform. The ‘light-weight’ version of the module can be accessed on the following address:

<http://vcampus.uom.ac.mu/edtech>

Username: *gemstudent*

Password: *gemstudent*

The Instructional Design Process

The first step is to know the rationale behind the conception of the module. Here are questions whose answers would normally guide the decision of whether or not to go forward with the module:

- Why was it considered?
- What were the needs and demands for such a module?
- What are the goals?
- What are the resources needed and are they available?

Module Information Sheet



Example

Example of an aim and rationale for a module: ILT1020 module

“To introduce an innovative edge in the University’s wide range of curricula by inculcating in our students the basic concepts of pedagogical design and engineering of eLearning courses. Many of our young graduates take up employment in the educational sector and their university experience is mainly based on the academic mastering of the subject matter. This module will help them in their future career as educators as well as keeping them up-to-date with the technological advances in education.”

The objectives of the module on Educational Designs – ILT1020

The main objectives of the ILT1020 module are to:

- Introduce our future graduates (aspiring teachers) to the field of educational technology with particular emphasis on eLearning.
- Provide the learners with knowledge of a range of technologies that can be used to improve the teaching and learning processes.
- Initiate the learners to simple instructional design and prototyping of computer-based learning modules.
- Develop the learners' ability to evaluate an eLearning module for a pedagogical, cognitive and human-computer interaction perspective.



Activity

Try to write down the broad aim(s)/goal(s) of one of the modules/courses you are currently teaching.

*Once you have the aim which depicts the broad vision you have set for yourself, you can break these into specific objectives. Remember that objectives of the module are generally things that you **want** to achieve with your learners and not **what** they (the learners) are going to achieve at the end of the course.*

Now try to write down at least three (3) specific objectives of the module you teach, i.e., what you are trying to achieve with the learners.



Tip

NB: *The concepts of Aims and Objectives are often confused or used interchangeably. A simple way to remember the difference is that Aims are very broad and do not have to be measurable. Objectives are narrower and must be measurable. An example would be: Aim – To have learners appreciate classical music. Objective – Learners will be able to distinguish between classical music of the modern and Baroque eras by listening to sample pieces.*

The objectives of the module on Educational Designs – ILT1020

While the objectives of the modules specify what the module is about i.e. what it is going to teach the students, the learning outcomes specify what the students will be able to do after following the module. Of course there is a kind of causal relationship that exists between the module's learning objectives and the learning outcomes. In a sense, when we know the objectives of the module, it can be used as the basis to formulate the learning outcomes.

The learning outcomes of the module can be in one or more domains of learning. It can be in the cognitive domain, psychomotor or affective domain of

learning. Furthermore, the learning outcomes can be either subject-specific skills, IT-specific skills or Learning-specific skills.

Instructional Design for Mobile Devices such as PDAs and Mobile Phones

Mobile devices such as PDAs and 3G mobile phones are becoming more and more accessible especially among the student community. The concept of mobile learning is reaching higher levels and there are many prototype systems that have been built and tested by research communities throughout the world.

While the technology embedded in these devices makes it possible to disseminate educational support and materials, the instructional design process needs to be adapted to suit the constraints imposed by these devices. Furthermore, it is unlikely that these devices could ever replace traditional paper or computers but they can be used as a complement to learning.

In the context of lifelong learning, Yuen and Wang (2000) postulate that m-learning fulfils growing demands for learning opportunities that enable learners to 'learn while you earn on the go'. This idea is supported by the assumption of Shepherd (2001) that 50% of the workforce does not sit at a desk, but instead is standing, walking around a factory. Although this argument shows that m-learning does fit into the work-style requirements of learners, the main question is whether such environments are really conducive to learning.



Reflection

Is it possible for learning to effectively take place in a site construction environment or while moving on a truck or while moving around in a factory?

Computer-Aided Instructional Design

Just as computers have helped in a number of domains, a number of software tools have been developed to help instructional designers improve productivity in their work. Such tools are called computer-aided instructional design just as computer-aided software engineering which are tools that help in the development of software.

Other ICT related tools that help in the pedagogical design of learning materials

Mind-Maps Software

A mind map is a diagram used to represent words, ideas, tasks or other items linked to and arranged radially around a central key word or idea. It is used to generate, visualize, structure and classify ideas, and as an aid in study, organization, problem solving, and decision making.

You can read more on http://en.wikipedia.org/wiki/Mind_map

A number of free and open-source software exist that will allow you to create concept-maps. Concept maps are not a must in every course but in many situations they can help to cater for learners with different learning preferences.

Examples of such tools are: Cmaps (<http://cmap.ihmc.us/>) and Freemind (http://freemind.sourceforge.net/wiki/index.php/Main_Page)

Knowledge Modelling Tools

Knowledge representation is an issue that arises in both cognitive science and artificial intelligence. In cognitive science it is concerned with how people store and process information. In the current context, we shall refer to knowledge modelling from the cognitive science perspective. A knowledge model is quite similar to a concept map in form but it may be fundamentally different from a conceptual point of view. Knowledge modelling tools normally have well-defined structures and rules to follow while developing the model.

One such knowledge modelling tool that has been used in the context of instructional design in MOT (Modelisation Objet Types|Object Oriented Modelling). MOT is a tool developed by researchers in Canada (Gilbert Paquette at the LICEF Research Centre – <http://www.wtn.net/2004/bio39.html>) to support the Method for Instructional Design and Analysis (MISA) model.

Courseware Authoring: The eXe software tool

The eXe project is developing a freely available Open Source authoring application to assist teachers and academics in the publishing of web content without the need to become proficient in HTML or XML mark-up. eXe can

export content as self-contained web pages or as SCORM 1.2 or IMS Content Packages.

The software can be downloaded from <http://exelearning.org/>

Instructional Design Guidelines

Instructional design guidelines are critical tools to ensure careful planning, correct ordering and processing of the course design, development and delivery. Though instructional designs vary considerably according to the goals of the instructor a general list of guidelines can provide some form of monitoring device as you develop materials. The following list of guidelines is a standard tool to monitor all instructional designs.

INSTRUCTIONAL DESIGN CHECKLIST

#	Checklist	<input checked="" type="checkbox"/>
1	Instructional Design Goals / Aims: <ul style="list-style-type: none"> • identify and write instructional goals guided by ID models, theories and research • determine steps to achieve the goals • identify constraints within which the instructional design may take place 	<input type="checkbox"/>
2	Needs Analysis <ul style="list-style-type: none"> • outline learner profile • list educational prerequisites • describe entry-level knowledge/technology skills • describe learner environment • identify resources and plan for uses Error! Hyperlink reference not valid.	<input type="checkbox"/>
3	Project/Course Development Team <ul style="list-style-type: none"> • form a course development team • set a framework or terms of reference for the team 	<input type="checkbox"/>
4	Goals and Objectives <ul style="list-style-type: none"> • state course goals and objectives • describe course expectations and navigation 	<input type="checkbox"/>
5	Course Specifications <ul style="list-style-type: none"> • identify users of course specifications (e.g. authors, marketing and finance staff) • develop contents for course specifications and indicate quality standards at each phase of course development and production 	<input type="checkbox"/>

#	Checklist	<input checked="" type="checkbox"/>
6	<p>Course Content Planning, Analysis and Development</p> <ul style="list-style-type: none"> • define quality assurance standards for the course • select appropriate approaches to content planning • determine the course scope in terms of quantity • establish a time line for the course development • develop checklists for the course development process • develop methods of sequencing/organising content within a course • develop pacing mechanisms to use (effects and devices). 	<input type="checkbox"/>
7	<p>Instructional Activities</p> <ul style="list-style-type: none"> • set active learning strategies (link to course objectives) • develop strategies to promote interaction and communication 	<input type="checkbox"/>
8	<p>Learning and Teaching Strategies</p> <ul style="list-style-type: none"> • create instructions to guide students to resources and their use • devise strategies to engage learners in active and meaningful learning • ensure that learners have a course outline and other necessary resources • choose appropriate and useful technology for learning and content delivery • create a teaching structure that benefits learning 	<input type="checkbox"/>
9	<p>Student Evaluation</p> <ul style="list-style-type: none"> • develop a plan for formative evaluation & ongoing feedback. • Provide a brief description of the summative evaluation and ensure linkage to objectives. • develop the grading criteria 	<input type="checkbox"/>
10	<p>Course Delivery and Support</p> <ul style="list-style-type: none"> • develop strategies for course delivery and support 	<input type="checkbox"/>
11	<p>Course Monitoring, Evaluation and Revision</p> <ul style="list-style-type: none"> • develop course monitoring strategies and tools • devise strategies for evaluating the effectiveness of course evaluation • create a tool (like a web board) to facilitate evaluation 	<input type="checkbox"/>

Figure 10

Module summary



Summary

There are numerous approaches to instructional design for ODL materials. Some approaches are more systematic such as the ADDIE model while others are more insular such as the Dick and Carey, Kemp and Hannafin and Peck models. Nevertheless, you will find that there are three main principles to every approach:

- i you must know your target audience and develop strategies for meeting their needs (Analysis and Design),
- ii you then develop your materials and pilot it -(Development and Implementation); and finally checking the piloted materials to see if they are working (Evaluation).
- iii Whatever the approach, they are all based on the principles of one or more learning theories such as behaviourism, cognition, constructivism, etc.

As with all other educational phenomenon, there are numerous emerging concepts in eLearning and the available software keep changing. Nevertheless their development is guided by three interacting principles; pedagogy, technology and usability. It is also important that a variety of media (e.g. urls, PowerPoint, audio clips, etc) and visuals (e.g. Cmaps, and Freemind) be used to enhance the design. The availability of the eXe software tool and other Open Source or proprietary authoring tools makes everyone at ease in publishing of educational web content and you don't have to be an expert in HTML or XML expert.

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Web Resources

http://en.wikipedia.org/wiki/Learning_theories

<http://www.funderstanding.com/theories.cfm>

http://carbon.cudenver.edu/~mryder/itc_data/idmodels.html

Module 3

Needs Analysis



Reflection

“If you don’t know where you want to get to...it doesn’t matter which way you go!” — Lewis Carroll, Through the Looking Glass

Introduction

Whether you are starting a new business or launching a new product, conducting a needs analysis is the first step in determining if there is a need or audience for your idea, product or service. Knowing the market’s needs and how it is currently serviced provides you with key information that is essential in developing your product/service and marketing plan. Too often, businesses/institutions spend thousands of dollars launching a “new” idea with a limited market because of competition.

This section will seek to introduce participants to the importance of conducting a needs analysis and the steps involved in conducting a needs analysis, prior to developing material for Open and Distance Learning.



Terminology

What is a needs analysis?

- the process of comparing a desired goal state with existing conditions
- a technique for understanding a performance problem before trying to solve it. (Rossett, 1987)
- a process for collecting information about a proposed online learning program before defining its goals and designing it. A needs analysis addresses the following issues: restating the request, stating the business need, identifying the performance gap, conducting a task analysis, describing the learners, describing the learning environment, and identifying the project constraints.

Source: <http://www.intelera.com/glosary.htm>

- a process for identifying the learning and training needs of a particular group or population.

Source: <http://www.col.org/colweb/site/pid/3128> (COL Glossary of ODL Terms)

Types of Needs Analysis

There are several types of needs assessment available for use. These include:

Context Analysis

This is an analysis of the institution's needs or reasons the training is desired. The important questions being answered by this analysis are:

- Who decided that the training should be conducted?
- Why a training program is being recommended as the solution to the institution's problem?
- What is the history of the institution in relation to the intended type of training?

User Analysis

This is an analysis dealing with the potential participants and instructions involved in the process. The important questions being answered by this type of analysis are:

- Who will receive the training?
- What is their level of existing knowledge on the subject matter?
- What is their learning style?
- Who will conduct the training?

Work Analysis

This is an analysis of the tasks being performed. It is an analysis of the job and the requirements for performing the job. It is also known as a task analysis or job analysis. This helps in human resource circles to determine training needs.

Content Analysis

This kind of analysis seeks to determine the level of knowledge or information that may be required.

Training Suitability Analysis

This is an analysis of whether training is the desired solution.

Cost Benefit Analysis

This is a financial analysis of the return on investment of training. Effective training results in a return of value to the organization that is greater than the initial investment to produce or administer the training.



Activity

Your task is to design a course of on-line training for a group of 30 teachers in both urban and rural primary schools in your country.

Select the type of needs analysis you would conduct and justify your choice.

Steps in Performing a Needs Analysis

STEP 1 - PERFORM A “GAP” ANALYSIS

The first step will require that you identify the problem. In identifying the problem, you will need to identify the following using the same methods outlined in Step 3.:

- 3 the training needs of your community/country/region
- 4 the demand for this kind of learning
- 5 the readiness of your institution to offer ODL (i.e., material, facilities and equipment and staff)
- 6 the readiness of the community/country/region
- 7 the number of institutions already offering ODL and their current offerings

STEP 2 - IDENTIFY PRIORITIES AND IMPORTANCE

At this stage, you will need to do the following:

- 1 Prepare a list of needs for training and development [career and country development]. These would have been identified from Step 1.
- 2 Examine the list in view of their importance to the institutional goals, realities and constraints.

- 3 Determine if the project is worth addressing in view of:
- cost effectiveness [how does the cost of the problem compare to the cost of implementing the solution]
 - legal mandates [are there laws requiring a mandate]
 - executive pressure [does top management, including Ministries of Education [policy makers] and the institution's Boards of Management require a solution and how supportive are they of the intended solution]
 - population [will persons be available for use in the project and will persons be available for training to ensure sustainability of project]
 - customers [what influence is generated by customer specifications and expectations]

STEP 3 - OUTLINE THE LOGISTICS/METHODOLOGY FOR CONDUCTING THE NEEDS ANALYSIS

At this stage, you will need to:

- identify the population: persons/organizations/institutions to be involved in the analysis
- identify the sample population - it will be difficult to get every possible person/institution or organization involved in a survey, hence it will be very important to determine how the actual persons to be involved will be chosen. You will therefore have to employ a method of sampling.

If you survey every person or a whole set of modules in a population you are taking a census. However, this method is often impracticable; as it is often very costly in terms of time and money. For example, a survey that asks complicated questions may need to use trained interviewers to ensure questions are understood. This may be too expensive if every person in the population is to be included.

Sometimes taking a census can be impossible. For example, a car manufacturer might want to test the strength of cars being produced. Obviously, each car could not be crash tested to determine its strength! To overcome these problems, samples are taken from populations, and estimates made about the total population based on information derived from the sample. A sample must be large enough to give a good representation of the population, but small enough to be manageable. In this section the two major types of sampling: random and non-random, will be examined.

For more information on each of the major sampling styles (i.e., random sampling; simple random sampling; systematic sampling; stratified sampling; cluster sampling and multi-stage sampling), refer to the Australian Bureau of Statistics website:

<http://abs.gov.au/websitedbs/D3310116.NSF/4a255eef008309e44a255eef00061e57/116e0f93f17283eb4a2567ac00213517!OpenDocument>



Activity

Outline a simple needs analysis you would want to undertake in which a stratified random sampling procedure would be more appropriate than a simple random sampling procedure.

Explain your reasoning and share it with other colleagues for feedback.

Methods of Data gathering

In conjunction with selecting a sample, you will also need to determine how you will gather your information:

- 1 observations
- 2 survey
- 3 questionnaires
- 4 interviews
- 5 checklists
- 6 tests
- 7 rating scales

Once you have decided on the method of gathering the data, you will then need to develop the data gathering instrument.

The data collecting step is a critical component of the needs analysis. In conducting a needs analysis several data collection methods/techniques can be utilised.

Questionnaires

- Questionnaires are also very important data gathering tools that can be used in conducting a needs analysis. However most problems with questionnaire analysis can be traced back to the design phase of the project. Well defined goals or objectives are the best way to assure a good questionnaire design. When goals of a study can be expressed in a few clear and concise sentences, the design of the questionnaire becomes considerably easier.
- As an on-line learner you will have to develop or sharpen your skills in designing questionnaires if you hope to be able to conduct and make effective use of the results of needs assessment.

In this case “practice makes perfect” so try out your questionnaires on colleagues before using them in the field.



Tip

See “*Tips For Developing An Effective Questionnaire*”:

<http://www.brainbliss.com/cat10/art04.html>

Interviews

- Interviews are particularly useful for getting the story behind a participant’s experiences. The interviewer can pursue in-depth information around a topic. Interviews can be useful as follow-up to certain respondents to questionnaires. For example to further investigate responses. Usually open-ended questions are asked during interviews.
- One thing to consider before you start to design your interview questions is to clearly articulate to yourself what problem or need is to be addressed using the information to be gathered by the interview. This will definitely help you to keep a clear focus on the intent of each question

Checklists and Rating Scales

Two other commonly used instruments that can be used in data collecting are checklists and rating scales. Both instruments have their own unique strengths and weaknesses and as a researcher you will have to familiarise yourself with these strengths and weaknesses and know when the use of one is more applicable over the other.



Tip

See “*How to Write a Checklist*” by Robert F Abbott:

http://sideroad.com/Business_Communication/how-to-write-a-checklist.htm

As you continue to develop your expertise at designing and conducting a needs analysis you will realise that many other instruments/tools for data collecting will make themselves available to you.

One thing you need to always keep in mind is that the type of information/data you seek to find will determine the instrument you will use.



Activity

You would like to find out if your teachers have the required hardware and IT skills to fully benefit from the outline courses you have designed. Construct a simple instrument that can help you to gather this data. Make sure to write out any assumptions you have made.

STEP 4 - ANALYSIS AND INTERPRETATION OF DATA

When data has been collected, in and of itself it is of no use. In order for it to become usable, it must be analyzed carefully. Once you have collected the data it needs to be analyzed and interpreted so that conclusions can be drawn for a final report to be submitted.

Data analysis is the act of transforming data with the aim of extracting useful information and facilitating conclusions. Depending on the type of data and the question, this might include application of statistical methods, curve fitting, selecting or discarding certain subsets based on specific criteria, or other techniques. *For more information, see http://en.wikipedia.org/wiki/Data_analysis*

STEP 5 - PRESENTATION OF DATA

Once the data has been analyzed, it can then be presented so that anyone can look at it and understand what it means. In other words it is presenting information in such a way that anyone, who is not necessarily an expert in the field, will be able to understand it. It is most common to present data using charts and tables. These allow for easy presentation and do not require any high level of understanding in statistics.



Activity

Use the instrument constructed in the previous activity and pilot it with a minimum of five teachers. Upload a short presentation and analysis of your findings for comments from your colleagues.

STEP 6 - CONCLUSIONS AND RECOMMENDATIONS

Once the data has been analyzed and presented in acceptable forms [tables, charts etc.], then the assessor [person[s] conducting the needs analysis], must now prepare a report to include conclusions drawn from the research and the recommendations. This is a critical part of the process as this presents the way forward.

For a summary of the needs analysis process see

<http://iit.bloomu.edu/id/NeedsAnalysis/NeedsAnalysis.htm>



Activity

Your school board of management is considering the introduction of instructing students using ODL. You have been asked to conduct a needs analysis, and to submit a comprehensive report to the Board on this new thinking. The board is funding the analysis exercise. You need to prepare a proposal detailing how the needs analysis will be conducted. This proposal must include, but is not limited to: people to be contacted, the method of contacting them; rationale for contacting them, costs involved etc. Once you have completed this proposal, you are required to present it in PowerPoint. You have one hour for the presentation.

The presentation must be uploaded onto your user page in the Wiki, along with your report in Word format.

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Module 4

Developing a Learner Profile

Introduction

A learner profile is basically information relating to individual learners who are engaged in the learning environment. In any course, it is always important to know who your learners will be, where they come from, their prior knowledge and their expectations from the course.

Developing a learner profile will enable us to better plan the course in a learner-centred way and to deliver the instruction in a manner that suits the individual preferences of the learner.

This module therefore aims at creating an awareness of the importance of a learner profile in the process of developing ODL (Open Distance Learning) materials. It outlines the steps the instructional designer would take in preparing a learner profile.

Upon completion of this module you will be able to:



Outcomes

- *Define* a learner profile.
- *Explain* the importance of having a learner profile.
- *Identify* the relevant content of a learner profile.
- *Identify* the methods of collecting learner profile data.
- *Differentiate* between the methods of collecting profile data.
- *Explain* how the instructional designer uses learner profile data.
- *Develop* learner profiles in specific territories.
- *Use* the learner profile data to contextualise and customise instruction.



Learning Environment:

a class, an online learning platform, a set of manuals and anything that forms part of learning for the learner.

Terminology

Learner-centred:	an educational philosophy that puts the learner in the centre of the learning process and not the teacher. Learner needs are given priority over the teacher's preferences.
Learning/cognitive styles:	The terms learning styles and cognitive styles have often been used interchangeably. However, some researchers make distinctions between the two terms. For instance, Jonassen and Grabowski (1993) distinguish between learning and cognitive styles by explaining that learning style instruments are typically self-report instruments, whereas cognitive style instruments require the learner to do some task which is then measured as some trait or preference.
Kinaesthetic resources:	resources that actually require the learner to 'do' things like note-taking, writing, putting parts together etc.

**Discussion**

Discuss the main difficulties/barriers involved in the process of learner profiling when it comes to distance education.

When you are involved in a face-to-face session, the participants are basically centralised at the same location. There are a variety of ways to interact with them, to access their records in a "just-in-time" fashion from the registry or administrative department etc. This kind of 'real' time access to the individual records can help you adapt your instruction on a daily or weekly basis. You can then progressively adjust your instruction to suit the learners' needs.

However, when you are in the process of preparing ODL materials for delivery, you need to plan your instruction, course guides and students' manual well beforehand. Furthermore, you will rarely know your learners because they are dispersed in different locations, come from different socio-educational cultures and means of interaction with them before preparation of course materials is minimal. The real challenge is then how to plan contents that are at the same time 'generic' (that is appropriate to diverse group of learners) but 'specific' (that is to meet the needs of the various learners with diverse profiles that you do not really know beforehand).



Reflection

As an educator, think of the students in your face-to-face classroom. Think of them in terms of their race, nationality, ethnicity, and social status etc. Jot down some 'sensitive' points that you think always need to be avoided or should not be used as examples in your classroom as they could be interpreted as offensive.

It is clear that in a class of say, 25 students we would have a mixture of students from different ethnic groups especially if you are in a multi-cultural and multi-ethnic society (mixture of people from Asian, African, Caribbean, European origins). Educators often unknowingly offend students when they make examples to illustrate concepts in their classes. For instance, in the Western world (Occident) sexuality is not a taboo subject while in most Asian communities (Oriental world) it is still taboo. So, as an educator, learner profiling would greatly help us in making choices which are important for the well-being of every learner in the course. One should also be very careful even when making jokes since not all jokes are acceptable in different communities and social classes! A course writer for ODL materials should therefore always bear in mind that the target groups for his course would be diverse and spread over different cultures from all over the world. So learner profiling should range from the more general profile (or group) to the more specific (or individualised) profile.

Contents of a learner profile

A learner profile can be broken down into two main categories:

1. Social, Personal and Professional Background
2. Learning and Cognitive Preferences

Social, Personal and Professional Background

When you are collecting data, it is possible to collect a lot of learner profile data – more perhaps than you could use. It is therefore important to think about what data you most need for the particular course you are preparing. For example:

- A course on a sequential subject (e.g., maths or a foreign language), data on prior learning might be the most important type of data to have.
- A course on a professional subject (e.g., law, accountancy), the most important thing to know might be learners' current work and the type of work that they hope to move into.

You therefore need to adapt your profile data collection to your needs as an instructional designer.

Look at Figure 11 below it outlines the types of information you may need to collect from your learners.

Category	Examples
Personal Characteristics	<ul style="list-style-type: none"> • Age • Gender • Family circumstances • Work circumstances
Reasons for Studying	<ul style="list-style-type: none"> • To gain entry to another course • To gain a qualification • For pleasure
Prior Knowledge	<ul style="list-style-type: none"> • The qualifications that the learners already have • Other learning that they have completed • Learning problems that they might have (e.g. misconceptions and bad study habits) • Learning or other disabilities
Prior Study Skills	<ul style="list-style-type: none"> • Experience the learners already have of studying other than in a classroom • Their ability to organize their own time • Their note-taking skills • Their self-assessment skills • Their ICT skills
Study Circumstances	<ul style="list-style-type: none"> • Their access to a library • Their access to a computer and the Internet • Their access to other learners • Their ability to visit study centres

Figure 11

Please note that much of the data mentioned in Figure 11 is personal and, at the very least, must be treated with respect. It may also be subject to privacy laws. Always be sure to check the regulations in your jurisdiction with respect to privacy.



Activity

You are planning a course for adults in an online environment. What information would you need to collect? Try to justify why you have included each piece of information.

Preferred learning/cognitive preferences

Learners mainly prefer to learn in ways that are different from other learners even if they are from the same class, culture or religion. It is believed that more than three-fifths of a person's learning style is biologically imposed (Restak, 1979). Furthermore, education research and practice have demonstrated that learning can be enhanced when the instructional process accommodates the various learning styles/preferences of students (Buch & Bartley, 2002).

It has been observed in learning style schools that many poor achievers do not function well under stress, but their stress appears sufficiently reduced after learning through their preferences to enable them to attain significantly higher scores on tests (Dunn et al., 1995). However, this opinion is not always shared by all educational researchers and practitioners. For instance, McLoughlin (1999) points to different empirical findings showing that learning styles not only enhance but can also hinder academic performance in several respects.

Dunn (1996) describes seven learning styles that discriminate between high-risk students and dropouts, and students who perform well in school. Dunn argues that a good instructional model to reduce drop-outs and problems in the learning experience should allow for:

- The students to be able to be frequently mobile.
- Decisions about how, with which resources, and with whom to learn.
- Different instructional environments and social groupings rather than routines and patterns.
- The possibility to learn during late morning, afternoon, or evening hours depending on personal preferences.
- No formal seating arrangements.
- Soft illumination of the learning environment.
- Introduction to materials with kinaesthetic or visual resources, followed by reinforcement.
- Frequent use of visual or kinaesthetic resources or an introduction to materials using kinaesthetic or visual resources, followed by reinforcement with visual or kinaesthetic resources. This mis-match of learning styles (i.e. using a variety of styles) makes learners 'better' learners.

However, these give us an indication of the importance that contextualisation of learning content based on information received from a learner profile can have in the success of the learner in a particular

course. One of the main problems that ODL systems have faced are high drop-out rates. While research has shown that there are a number of factors that contribute to this phenomenon, the problem is mainly attributed to a lack of personalisation of those environments. This is related to the fact that most materials are generic and may not be accommodating for the varying preferences of the learners.

There are a number of different instruments that are available to measure preferred learning and cognitive styles of learners. The variety of instruments available and the 'lack' of consensus and standardisation of the instruments has given rise to criticism from different researchers and educators. The validity of these instruments have also been questioned by some since they are mainly self-report activities carried out by the students that will in cases be subjective rather than done in an objective way. However, despite these criticisms research in this area is still ongoing. Some of the main learning/cognitive styles instruments that are available are the:

1. Honey and Mumford Learning Styles
2. Dunn and Dunn Learning Styles
3. Kolb Learning Styles
4. V-A-K (Visual - Auditory - Kinaesthetic) Cognitive Styles

The constraint that is posed by these learning style instruments in the context of ODL is that it is difficult to get the students to fill in the forms and submit them in a timely manner. Furthermore, in each student group, this information will vary. Once an educator gets to know these preferences, they will have an affect on the way he/she shapes learning support (discussed in a different unit).

The broad idea is to make you aware of the different preferences of learners and that one needs to design ODL materials in such a way that it accommodates different types of learners.



Activity

Write down four media that are available to you and short notes about how you would use each of them to cater for a learner with different preferences. You may carry out a brief Internet search on the V-A-K cognitive style. For example, how would you use radio broadcasting to teach a maths lesson?

Note: The V-A-K instrument has been developed by Barbe and Milone (1980) and describes the learner as visual, auditory and kinaesthetic. Persons with a visual preference tend to show a greater ability to analyse and integrate visual information, mentally convert non-visual information into visual, and show superior retention of mental images (Ayersman and Minden, 1995). An auditory learner, on the other hand would prefer to process information in the form of verbs and, either written or spoken (Jonassen and Grabowski, 1993). Kinaesthetic learners prefer to process information through tactile means such as interactive media or using physical objects (sometimes referred to as “manipulatives” in the literature.

Methods of collecting learner profile data

Information can be collected by several different methods as follows:

- **Direct observation** (e.g. observing the person at work)
This method reduces the chance that incorrect information may be gathered, but it is not always viable (e.g. it would be practically impossible to follow lectures for a month to find out her competencies in delivering content).
- **Personal surveys**
Data can be collected using a questionnaire, or direct interviews. This method has the advantage that many questions can be asked quickly and that high response rates are achieved. It is generally used to collect information / data from small numbers of people. You may need this to find in-depth information about the learner. However, this may not be possible since participants could be from different countries.
- **Postal surveys/Emails**
Use a sample of people drawn from a specific mailing list or from an electoral register. The people selected could be sent (e-mailed or posted) a questionnaire.
- **Telephone surveys**
Telephone surveys are special cases of personal interviews. These are becoming more widely used because more and more people have telephones at home.



Reflection

Discuss the advantages and disadvantages of the above mentioned methods.

Sources of learner profile data

The most accurate source of data is that from the learners who are going to take the course you are designing. Unfortunately, you may have no access to those learners. For example, if you are setting up a new ODL organisation, you will need to start planning courses many months before any students have enrolled. Even if you are working in an existing ODL institution, you cannot necessarily assume that the institution's existing students will represent the students for the new course. For these reasons, collecting accurate profile data is problematic and you need to be careful in extrapolating data from existing learner groups to future ones.

Alternative Methods

- Use the characteristics of the students that you have had in your classroom.
How will ODL students be similar to these? How will they differ?
- Contact other teachers who have taught similar students.
Ask them for learner profile data on their students.
- Gather together a group of students on an existing but similar course.
- Ask them for data about themselves.
- Mail a questionnaire to past students, current students or people who have enquired about the courses offered by your institution.
- Find out what sort of student profile data is kept in your institution's administrative records. If this is on computer, you might be able to search for data on courses at the same level or in the same subject as the one you are working on.



Group activity

Discuss in your groups, some other alternative ways to collect similar type data from existing groups?

Use of learner profile data to design instruction

To cater for the two categories of learners, an instructional designer may need to use the balanced training design method which would provide a

balance of text, pictures and diagrams. Let us look at Figure 12 showing how learner profile data could be useful to instructional designers.

Type of data	You need to know this to decide . . .
Literacy Level	The level of language to use when writing materials.
Age Group	What types of examples to use; the extent to which you can draw on learners' experience (e.g., older learners will have more experience from work and raising children).
ICT Skills	The skills you can assume learners have and which will have to be taught.
Reasons for Studying	The approach and types of examples to use to best motivate learners (e.g., learners studying law to become lawyers might be motivated by a different approach than that of learners studying law to help them as managers of small businesses).
Home Situation	Does the learner have a place to study? Does the learner have access to electricity?
Prior Knowledge	The skills you can assume learners have and which will have to be taught.
Learning Situation	The sorts of tasks you can set (e.g., can you set a task that requires going to a library?).

Figure 12

Resources



Reading

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Module 5

Methods of Delivery (including learner support)

Introduction

This module introduces you to the varied approaches/methods used in the delivery of Open and Distance Learning (ODL) programmes. It is designed to provide you with ‘hands on’ experiences in using tools to deliver ODL programmes. We will examine synchronous and asynchronous approaches to allow flexibility in the choice of delivery methods to suit varying contexts and learning environments. The module also introduces you to some learner support strategies inherent in ODL methods of delivery.

Upon completion of this module you will be able to:



Outcomes

- *Identify* different methods used in the delivery of ODL programmes.
- *Distinguish* between synchronous and asynchronous approaches to delivery.
- *Identify* synchronous and asynchronous tools.
- *Identify* types of learner support strategies in the delivery of ODL programmes.
- *Apply* ODL delivery methods in the delivery of content.



Discussion

‘Open Learners’, ‘Distance Learners’, or ‘Open and Distance Learners’?

- *Who is an open learner?*
- *Who is a distance learner?*
- *Based on ideas generated from above, identify some characteristics of open and distance learners.*

Open learners study on their own time and at their own pace (within reason). Distance learners are physically and/or temporally remote from each other and their ‘tutors’. So each type of learner has their own needs.

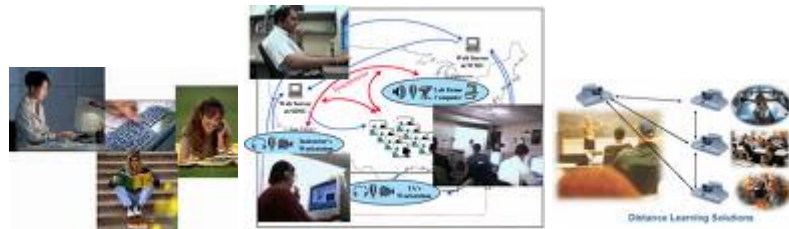
The activity which follows will help you to better understand those two concepts.



Group
activity

What are the different ways of connecting distance learners to their 'learning community'? Make a list.

*From your list, identify those that could **not** be used for open learners without compromising their 'open-ness' and specify why?*



The important message from this section is that open learners need not be distant and distance learning need not be open.

Open and distance learning (ODL) is the term coined to cover the common ground between both types of learner. You need to decide where on each of the scales of open-ness and distance you want or expect your learners to be.

Delivery Methods

The delivery method is the medium through which course content is transmitted and human interaction occurs. The choice of delivery method is influenced by a number of factors that include the nature of the content, the characteristics of the learner, the specific environments for learning and the available technologies.

Delivery methods fall under two broad areas: **Synchronous** and **Asynchronous**.

Synchronous Learning: A real-time, usually moderated online learning event in which all participants are available at the same time and can communicate directly with each other.

Synchronous methods provide immediate availability of the instructor for questions and feedback. It provides many different types of tools, is similar to the classroom, and allows for real-time collaboration among participants.

Asynchronous learning: Learning in which interaction between instructors and students occurs intermittently with a time delay. Asynchronous methods allow time for reflection, allow participants to work at their own pace and can be highly structured.

Figure 13 below lists some of the examples of the above:

Synchronous	Asynchronous
Teleconferences (SKYPE); video conferencing; audio conferencing; web conferencing	Discussion boards; calendar – dates for assignments, examinations, events, etc.
Chat; chat rooms	Website links; Listservs; blogs
Instant messaging : MSN, IRC- Internet Relay Chat, ICQ	Group announcements; messaging; e-mail
White-boards	Surveys & polls
Virtual Classrooms	Threaded discussions

Figure 13

Synchronous Methods of Delivery

There are four equally compelling advantages to synchronous systems (although you may not agree with the order in which they are usually presented):

- **motivation** - synchronous systems focus the energy of the group, providing motivation to distance learners to keep up with their peers and continue with their studies.
- **telepresence** - real time interaction with its opportunity to convey tone and nuance helps to develop group cohesion and the sense of being part of a learning community.
- **good feedback** - synchronous systems provide quick feedback on ideas and support consensus and decision making in group activities, both of which enliven distance education.
- **pacing** - synchronous events encourage students to keep up-to-date with the course and provide a discipline to learning which helps people to prioritize their studies. (Distance Education Solutions: North American Web Developers Conference, October 1997).

Features of synchronous systems

- live interaction in real-time
- allowing individual and group work
- presentation formats incorporating both discussion or lectures
- learning both from the instructor and other students input

- resource tools and materials that can be introduced, presented, shared and removed
- student activity that can be monitored and facilitated by the instructor.



Group
activity

Get into small groups and discuss/debate the following statements. When you are done, report back to the larger group.

Synchronous technologies:

- 1 allow content to be produced in less time and expense;
- 2 can be used for any content type having a long or short lifespan and for large or small audiences;
- 3 can be created quickly, therefore it is especially useful where there is an immediate need.
- 4 make it difficult to repeat the work or a lecture towards mastery.
- 5 provide limited opportunity to allow remedial or extension exercises.

Disadvantages of synchronous delivery methods

- Difficult and /or expensive getting to the venue
- The learner is dependent on the ability of the teacher.

Asynchronous Methods of Delivery

There are four crucial advantages to the asynchronous media; they are arranged in descending order of significance:

- **flexibility** - access to the teaching material (e.g. on the Web, or computer conference discussions) can take place at any time (24 hours of the day, 7 days a week) and from many locations (e.g. oil rigs).
- **time to reflect** - rather than having to react 'on one's feet', asynchronous systems allow the learner time to mull over ideas, check references, refer back to previous messages and take any

amount of time to prepare a comment .

- **situated learning** - because the technology allows access from home and work, the learner can easily integrate the ideas being discussed on the course with the working environment, or access resources on the Internet as required on the job.
- **cost-effective technology** - text based asynchronous systems require little bandwidth and low end computers to operate, thus access, particularly global access is more equitable.

Other Advantages

- Supplements classroom resources.
- Allows students and instructors to communicate with each other at any time.
- Typically useful for large audiences.
- Useful where the need is not immediate.
- Ideally suited to structured content requiring pre-examination.

Disadvantages

- Takes more time and resources.
- Loss of face to face contact, if this was the only mode.
- Possibility for overload of resource material.
- Possible loss of a sense of continuity and immediacy.



Note it! /

In ODL the learner depends on the adequacy, reliability and accessibility of learning informational resources. As distance educators one should be competent and committed to compiling and delivering the course information to the distance learner at the right place and time. Planning and deciding on delivery methods and the resources required to support the delivery of a course is a crucial factor. What are these methods of delivery? As distance educators we need to carefully decide on appropriate methods of delivery. The following methods of delivery are used by ODL institutions. We need to assess each one and decide how useful it is to the delivery of ODL courses.



Case Study / Example

See handout related to “Delivery Methods”:

http://www.wikieducator.org/images/e/e0/Adv_and_Disad_of_synchronous_and_asynchronous_2.pdf.

See Module 9 – “Appropriate Technologies” – for a fuller discussion on choosing and integrating the appropriate delivery medium, including blended learning.

Learner Support

Learner support is a ‘support system’ underpinning material and learning task provisions. This defines learner support as the means through which individuals are enabled to make use of institutionalised provisions.

Learner supporters are ‘intermediaries’, able to talk the language of the student/learner and to interpret the materials and procedures of complex bureaucratic organisations (Sewart, 1993). While course production might work within a management model appropriate to manufacturing industry, Sewart likens learner support to a service industry, in which the needs of customers are paramount. Learner support activities are produced and consumed simultaneously, a process in which the learner/consumer must participate actively, as well as the tutor/supporter. One of the major reasons for the fairly high drop out rates in ODL programmes is the lack of adequate learner support. The problem of learner support becomes more critical when interaction between tutor and learner is not as constant as that which may exist in face-to-face classes.

One of the key questions to address as a provider of ODL is the extent and manner of support you will be offering to learners. All learners need access to some kind of ‘tutor’ to help guide them through the sticky patches. The range of possibilities extends from old-fashioned ‘correspondence tuition’ to regular face to face meetings and includes student/student peer support. Many factors combine to influence what level of support is appropriate, ranging from the geographical distribution of learners to the cost of providing a given level of service. But there must be support if learners are to complete in any numbers. (Mark Endean, 2006).

Two vital elements of successful ODL programs are the quality of learning resources and the efficacy of delivery mechanisms. However, given that students might have limited access to support from teachers and other learners, the social aspect of ODL also deserves attention in education for development. While experienced students with good learning skills might succeed in ODL conditions that provide only limited contact with instructors and other learners, the drop-out rate in ODL is troubling; often more than 50%. Students with less experience in academic education and training are the main constituency for ODL in

development. Thus, in order for education to assist in the achievement of development goals, it is vital to address social aspects of learning. Students require access to appropriate and adequate support and social contact in order to decrease drop-out rates and increase successful course or program completion. (Calvert, 2006).

Meeting Student Needs

To function effectively, students must quickly become comfortable with the nature of teaching and learning at a distance. Efforts should be made to adapt the delivery system to best motivate and meet the needs of the students, in terms of both content and preferred learning styles. Consider the following strategies for meeting students' needs:

- Assist students in becoming both familiar and comfortable with the delivery technology and prepare them to resolve the technical problems that will arise. Focus on joint problem solving, not placing blame for the occasional technical difficulty.
- Make students aware of and comfortable with new patterns of communication to be used in the course (Holmberg, 1985).
- Learn about students' backgrounds and experiences. Discussing the instructor's background and interests is equally important.
- Be sensitive to different communication styles and varied cultural backgrounds. Remember, for example, that students may have different language skills, and that humour is culturally specific and won't be perceived the same way by all.
- Remember that students must take an active role in the distance delivered course by independently taking responsibility for their learning.
- Be aware of students' needs in meeting standard university deadlines, despite the lag time often involved in rural mail delivery.



Case Study /
Example

See

http://www.wikieducator.org/images/a/ad/Learner_support_handout.odt
for handout of the above on Learner Support.

And http://en.wikipedia.org/wiki/Internet_forum for information on
discussion forums.



Activity

Please click on <http://www.bellaonline.com/articles/art47688.asp> and read about online discussion forums.

Feedback mechanisms

Feedback mechanisms enable the instructor to identify and meet individual student needs. The following are some feedback mechanisms:

- Pre-class study questions and advance organizers to encourage critical thinking and informed participation on the part of all learners.
- Early in the course, require students to contact you and interact among themselves via electronic mail or discussion boards, so they become comfortable with the process. Maintaining and sharing electronic journal entries can be very effective toward this end.
- Arrange telephone office hours using a toll-free number. Set evening office hours if most of your students work during the day.
- Integrate a variety of delivery systems for interaction and feedback, including one-on-one and conference calls, fax, E-mail, video, and computer conferencing. When feasible, consider personal visits as well.
- Contact each site (or student) every week if possible, especially early in the course. Take note of students who don't participate during the first session, and contact them individually after class.
- Use pre-stamped and addressed postcards, out-of-class phone conferences, and e-mail for feedback regarding course content, relevancy, pace, delivery problems, and instructional concerns.
- Have students keep a journal of their thoughts and ideas regarding the course content, as well as their individual progress and other concerns. Have students submit journal entries frequently.
- Use an on-site facilitator to stimulate interaction when distant students are hesitant to ask questions or participate. In addition, the facilitator can act as your on-site "eyes and ears".
- Call on individual students to ensure that all participants have ample opportunity to interact. At the same time, politely but firmly discourage individual students or sites from monopolizing class time.
- Make detailed comments on written assignments, referring to additional sources for supplementary information. Return assignments without delay, using fax or electronic mail, if practical.

Academic Counselling



What is counselling?

Counselling is the process of helping students to select, prepare, enter and progress in the patterns, which comprise human activities in the educational, vocational, recreational field as well as in connection with community service group. Counselling prepares the student for his life. Counselling helps the student to identify his problems and get at solutions by himself. (DRAFT FOR DISCUSSION Commissionerate of Collegiate Education Module for Academic Counsellors in Government Colleges).

Peer review/ evaluation



Personal interaction/availability

Students need to have personal interaction with instructors, content and other students. To access an instrument for gauging/assessing student participation in online discussions, see http://www.wikieducator.org/images/d/d2/Assessing_Effectiveness_of_Student_Participation_in_Online_Discussions.pdf

Learner Support in ODL: A model

Deschênes & Lebel (1994) addressed the very important issue of supporting the learning process in distance education. It is very often that distance learners find themselves isolated in the educational process. This results in a decrease in motivation or they are very often tackling other priorities that come up in their life. Finally, they no longer see the importance of continuing their studies.

The high drop-out rate of students in distance education courses has been the subject of various studies. The Internet, however, with its collaborative and networked infrastructure has significantly contributed to overcome the first problem by allowing interactive synchronous or asynchronous communication between peers and tutors and among peers themselves. Learning therefore becomes a kind of social process in these environments and the individual gets a sense of being someone involved in a social relationship with others sharing the same goals.

The two main models related to learning support are the academic and the autonomist model (Deschênes & Lebel, 1994). The academic model works in the sense that the support to learning has an urgency to recreate the relationship of tutor-student as in traditional face-to-face education. On the other hand, the autonomist model mainly favours interaction between the student and his learning objects and has a tendency towards the constructivist approach while according much more autonomy to the student.

As we mentioned above, while flexibility and independent learning are highly valued attributes in the concept of distance education, the feeling of loneliness and rejection very often take the place of the learner's confidence and motivation to carry on with the course. The academic model seems to cater to this disadvantage since the simulation of a traditional environment is at the base of it while the autonomist model seems to cater to independence, flexibility and better learning methodology. The model shown in Figure 14 below illustrates a combinatorial approach of both models that is adopted at the University of Mauritius in supporting the learning process for DE modules.

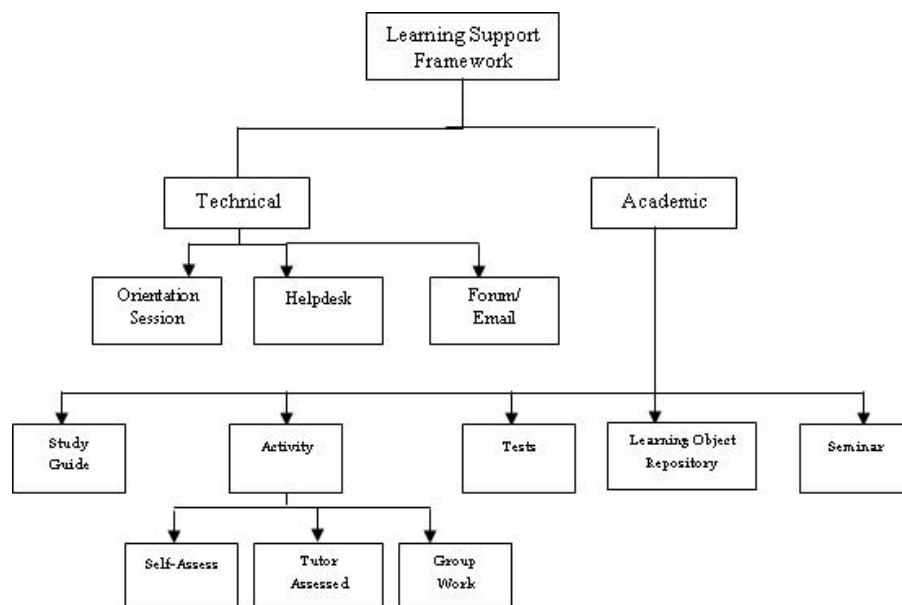


Figure 14 - eLearning model at the University of Mauritius (Santally et al., 2005)

Module summary



Summary

In this unit we have looked at methods of delivery that can be applied in the delivery of ODL courses. You should by now have a sound understanding of various types of synchronous and asynchronous methods of delivery. You should also be able to classify the various types of methods under the broad categories of synchronous and asynchronous. We have also looked at the contributions and impact of delivery methods on the quality of learner support services a learning institution can offer. Examples of common types of learner support services like discussion forums, feedback mechanisms, academic counselling, peer review/evaluation and personal interaction have been mentioned in this module. Remember, whatever support services your institution offers, you need to make sure they support the delivery methods employed by your institution. We know that when methods of course delivery are well planned, adequately resourced and effectively implemented, the distance learner will find the course very interesting and the course material much more user friendly.

References

- 1 Calvert (2006).
- 2 Deschênes, A.-J. et Lebel, C. (1994). La conception du support à l'apprentissage dans des activités de formation à distance. *La formation à distance maintenant (Conception of learning support in distance learning activities. Distance Education Today* (Thème II, Texte IV). Québec Téléuniversité.
- 3 Santally, M., Govinda, M., & Senteni, A. (2005). The University of Mauritius e-Learning Model: Practice, Pedagogies and Tools. World Conference on Educational Multimedia, Hypermedia and Telecommunications. 2005(1), pp. 619-625.

Web Resources

Plan for Module 4:

http://www.wikieducator.org/images/9/90/Plan_for_Workshop_Module_4_PDF_Version.pdf

Module 6

Developing Content for Open and Distance Learning

Introduction

In this module you will be exposed to examples of best practices and recommended techniques for developing distance education materials. You will also explore the rudiments of structuring content which facilitates independent learning and an interactive, enjoyable experience for the learner. This process will involve practical interactive exercises.

Upon completion of this module you will be able to:



Outcomes

- *Identify* characteristics of good open and distance learning materials.
- *Create* SMART learning objectives.
- *Produce* interactive learning content.
- *Use* appropriate language to create open and distance learning materials.
- *Use* an existing template to structure content for open and distance learning.

Best Practices

Over the years institutions such as the UK Open University (OUUK) and other open learning institutions around the world have suggested some proven practices for developing ODL materials. In this section of the workshop you will get the opportunity to review some existing ODL materials. This will give you a good picture of what you will be creating during the rest of the workshop.



Activity

1. Go to <http://www.indiana.edu/~disted/index.html> to view good samples of distance learning materials. Remember to click on icons to view as many parts of courses as you possible can.
2. As you survey the materials, try to identify some unique characteristics or key features of the distance learning materials that are common to all the sample materials.

Key Features of ODL Materials

1 LEARNING OBJECTIVES

Learning objectives are important for developing self-instructional materials. The following highlights critical information that should be closely observed when preparing learning objectives for open and distance learning.

Writing SMART Learning Objectives

What are learning objectives?

- Statements of intent (what the learner should be able to do as a result of studying a unit or section)
- Learner competency/outcome related statements

Types of objectives

Objectives can be classified in many different ways. Benjamin Bloom identified three levels of objectives:

1. cognitive level
2. affective level
3. psychomotor level

Characteristics of good learning objectives

Objectives should indicate the learner behaviour at the end of the unit/module. Objectives should be **SMART**:

- Specific
- Measurable
- Achievable
- Realistic
- Time-bound

They should also be simple, clear and precise.

Sources of Objectives

- Syllabus/module/unit outlines/subject content
- Your understanding of the target group
- Skills/attitudes to be developed/changed
- Existing objectives (if any)
- Own experience

Value of Objectives

Enable writers to:

- Clarify educational intentions
- Identify and sequence content
- Decide on most appropriate teaching media
- Select the most appropriate activities
- Decide on suitable ways of assessing learning
- Evaluate the effects and effectiveness of materials

Advantages for learners:

- Show them what is to be covered (concepts to be learned, skills to be mastered)
- Present them with challenges ahead and standards to be achieved
- Enable them to evaluate themselves (assess own progress against objectives)

- Build their self-confidence
- Prepare them for final exams (if applicable)



Note it!

For a PowerPoint version of the above materials, see
http://www.wikieducator.org/images/e/e6/Learning_Objectives2.pdf



Activity

Identify a unit topic in one of your courses and use the SMART principle to develop a minimum of four (4) objectives.

2 INTERACTIVITY ASSESSMENT AND FEEDBACK

Interactivity, assessment and feedback are the most critical aspects in developing ODL materials. Here is a brain teaser for you.

Brain Bumper - Use your knowledge of types of assessment tools to classify each of following as INTERACTIVE or NON-INTERACTIVE:

- multiple choice
- portfolio
- observation
- essay
- research
- questionnaire
- matching

To view a PowerPoint presentation for this section, see
http://www.wikieducator.org/images/3/30/INTERACTIVITY%2C_ASSESSMENT_AND_FEEDBACK.pdf Please pay close attention to the information and suggestions given.

The materials from the presentation are also provided below.

Defining the Terms

Interactivity:

- In this context interactivity is meant to refer to degree to which course material is able to elicit frequent, active responses from a learner.

Assessment:

- In the context of creating ODL materials, assessment is meant to refer to using either self-assessment or instructor-led assessment methods to determine learner/student progress.

Feedback:

- Refers to responses made to learners' submissions and self-study activities included in the course materials.

Rationale for Use of Instructional Activities in DE Materials

- Guide learner through learning objectives (understand scope and relevance of course, assist learner to achieve a specific level of competency)
- Reinforce learning
- Encourage learner's active participation (learning by doing!)
- Promote curiosity and learner motivation
- Provide opportunities to apply newly introduced concepts
- Promote critical thinking skills
- Measure learner performance
- Build quality control into self-instructional materials
- Encourage self-directed learning
- A variety of instructional methods should be utilized to avoid monotony

Forms of Assessment

- Tutor-marked assignments (TMAs)
- Self-marked assignments (SMAs)
- In-text questions (ITQs)

Self-Marked Assignments (SMAs):

- Tasks in materials which make the learning process interactive
- Developed by course writer immediately after objectives have been written
- Enables learner to check progress
- Should test learning at cognitive, affective and psychomotor (if appropriate) levels
- Feedback is critical

Different Types of SMAs:

- Writing (list/record)
- Reflect on own experience
- Consult other sources (e.g. local expert)
- True/false questions
- Ticking boxes (agree/disagree)
- Multiple choice questions
- Matching items, underlining
- Completing blanks, tables, crossword puzzles, number puzzles, tables
- Perform a calculation
- Examine experiment results
- Practical activity

In-Text Questions (ITQs):

- Questions which are included in the text that relate to the theme/topic being explained
- Used in self-instructional materials to replace the quick question that form part of effective face-to-face teaching
- ITQs appear at regular intervals in the text – no formal policy on the number of ITQs, but remember the following:
 - The number of ITQs depend on the nature of the subject and the level of difficulty
 - Use ITQs when you consider it important for the student/learner to think about something first before carrying on

- Ask yourself whether you would have deemed it necessary to ask a question of this nature in a face-to-face session
- Keep the concentration span of learners in mind – they need a stimulus every 10 – 15 minutes

How Do You Generate SMAs and ITQs?

- Keep the learning objectives in mind to test understanding or apply a concept
- Anticipate a problem/misconception learners might face and ask a question or design an activity to break the misconception
- Involve learners in a dialogue as they study through the materials
- Ask learners to interpret diagrams, tables, charts, etc.
- Think of your own learning experiences (what kind of activity would have been useful to you to understand the ideas/procedures under discussion)
- Adapt suitable face-to-face group exercises

Important Don'ts:

- Do not ask value questions
- Do not ask irrelevant questions
- Do not set an activity unless you are sure that learners have a reasonable chance at attempting it
- Make it worth spending their time on it

Technical Issues:

- Be clear on how long you expect learners to spend on each activity and the length of the expected answer
- Keep the balance between short and long activities
- Give ample feedback: it is the only way for your learners to assess their own progress
- Give clear instructions and always have your learner in mind!



Activity

Using the objectives that you created earlier and the information you learned from the presentation, develop two self-mark activities that promote learner interactivity.



Reflection

Remember frequent, immediate feedback is critical for promoting self-directed learning!

3 DISTANCE EDUCATION WRITING STYLE

Simple Language

Your course materials may be well-planned and constructed, but may be ineffective if the language used is not appropriate to the learner population. This section provides some suggestions for writing in an accessible way. It is important that you consider the following guidelines:

- Write in very simple language
- Use vocabulary appropriate to your target group (Remember English is a 2nd or 3rd language for most learners)
- Keep to one idea per paragraph
- Eliminate unnecessarily long phrases and sentences by using one word (e.g. use “*Many*” instead of a large number)
- Use familiar words
- Use relevant examples
- Use precise words
- Use strong active verbs (e.g. “You may use scissors” instead of “Scissors may be used”)
- Choose your structures (simplify sentences, keep them short, limit the use of negatives, watch your word order)



Reflection

Remember, simple language makes it easier for learners to study and comprehend!

Learner-friendly Style (conversational)

It is important and desirable when creating ODL materials that you create a warm, learner-friendly environment for your learners. Below are additional tips that are useful in doing this.

- Make the materials as readable and accessible to as wide an audience as possible
- Be consistent in writing - users become familiar with your writing style
- Use a more informal style of writing (e.g., refer to yourself as “I”)
- Speak directly to the learner and call your learner “you”
- Use the kind of tone you might use in a one-to-one conversation (conversational tone)
- Include humour where possible

- Use gender sensitive language (rather use they, them instead of he/she, etc.)
- Use bulleted lists and tables where possible



Reflection

Remember, learners should ENJOY reading and using the course materials!

Accessibility

Using access devices can create a more pleasant experience for learners by making it easier for them to navigate through the information or content. The following list of access devices can be useful in achieving this.

- 1 Before the Main Body of the Unit/Section include:
 - Explanatory title
 - Contents list

- Flow diagrams
- List of objectives

2 During the Unit/Section include:

- Introduction
- Headings and sub-headings
- Instructions
- Numbering system
- Verbal signposting (don't just tell your learners what you are telling them - tell them why you are telling it)
- Visual signposts (icons, layout and structure should be apparent where possible)
- Summaries

3 After the Unit/Section/Module include:

- Keywords
- Motivational chat
- Linking statements



Reflection

Remember, ODL materials have a fairly complicated structure and access devices help learners find their way around the materials!

Physical Features of ODL

It is imperative that you keep your learner in mind by considering how your material will appear physically on each page. The following tips do not only enhance the appearance of your materials but it enhances readability and understanding by your learners.

**Tip**

On physical features of ODL materials:

- White margins and white space (give space for learners to make notes in the margin and to answer SMAs, ITQs)
- Notional hours ought to be included (assume the time it would take the average learner to complete a Unit/Section - this is done to avoid overloading). When in doubt, estimate the time that it would take you or an expert learner to get through the materials and multiply that time by three (3).
- Keywords (to explain technical terms, new concepts, difficult words - decide where to include your keywords)
- Graphics and illustrations (to break monotony, makes materials interesting and appealing)
- Icons (develop own set - remove the need for repeated written instructions)
- Summaries and linking statements
- References

**Activity**

Use the information you learned in this section of the workshop to prepare a checklist that you can use as a tool for monitoring the inclusion of all the key features in ODL materials.

Structuring a Unit/Module

It is important to break content up into manageable chunks to facilitate independent learning. ODL courses are normally subdivided into units that correspond to a week's work. In print, each unit is like a chapter of a book. On the web, units usually correspond to one subdivision of the course web site. This part looks at the structure of a typical unit. Good self-study materials usually have three key stages:

- explaining what the unit will be about (through the use of an introduction and a list of learning objectives)
- conducting the session (this is the bulk of the unit where learning objectives are addressed and teaching and learning mostly takes place)
- reminding learners what the unit was all about and checking whether they have learnt the content (a common way to do this is to provide a self-mark activity and a summary of key points in the unit). The Commonwealth of Learning (COL) proposes the following components at each stage of the unit structure:

Introductory material

1. Unit number and title
2. Introduction
3. Contents list
4. Statement of pre-requisite knowledge (or pre-test)
5. Learning objectives for unit
6. List of any equipment needed for studying the unit
7. Other resources needed for studying the unit (e.g., a textbook)
8. Time required for the unit

Teaching and activities

1. Examples
2. Explanatory text
3. Activities with feedback
4. Diagrams and illustrations
5. Topic summaries

This stage is usually divided into topics, each matching one learning objective.

Closing material

1. unit summary
2. self-mark activity (based on the unit learning objectives)
3. link forward to the next unit

**Activity**

Using the objectives, self-mark activities and checklist you created earlier, fully complete the materials for the course unit that you selected for the initial exercise.

You are expected to utilize the information, principles, techniques and methodologies learned thus far.

Module summary



Summary

Developing ODL materials gets easier with practice. You will find that working in groups is a great idea together with the use of peer review. You have learned that one of the most important things is to organize your work into a template that captures the key features of ODL materials such as:

- Objectives
- Activities
- Assessment
- Resources

Writing objectives and content using language that is clear, specific and relevant to the context of the learner is important for enhancing the appeal and readability of your materials. Creating the zeal or desire for learners to continue to interact with the ODL materials depends on how easy it is to understand and apply the information. Thus it is crucial for you to make use of accessible icons, pictures, illustrations, concept maps, flow charts and other enhancing tools for cognitive processing. Providing other resource materials and various types of assessments enables learners to monitor their progress. At the same time keeping your text straight to the point while using a conversational and friendly tone helps to keep your learner on task and makes the lesson more personalised and sociable.

Web Resources

COL's website: <http://www.col.org>

Create a crossword puzzle: <http://www.puzzle-maker.com/>

Create other kinds of puzzles: <http://www.puzzle-maker.com/>

Facilitator Resources:

http://www.wikieducator.org/images/1/18/Facilitator_Resource_Pack.pdf

Participants Resources:

http://www.wikieducator.org/images/2/2d/RESOURCE_PACK_FOR_MO_DULE.pdf

Module 7

Assessment in ODL

Introduction

In this module, you should pay attention to the following issues:

1. How to meet learners' needs as they prepare for different modes of assessment.
2. How to ensure a high degree of validity of assessment results.
3. What should be the balance between continuous and final assessment?

Upon completion of this module, you will be able to demonstrate knowledge/understanding of:



Outcomes

- The role of assessment in student learning.
- Learners' needs for different modes of assessment in ODL.
- Methods of planning and writing assessment instruments for ODL.
- Methods of planning and writing tutor-marked assignments.

You will also develop skills in:

- *Creating* a balance between modes of assessment.
- *Matching* assessment to appropriate levels of thinking.
- *Planning and writing* assessment for ODL.
- *Creating* assessment instruments.
- *Creating* assessment instruments for tutor-marked assignments.

Principles of Assessment

1. Issues for designers of ODL Materials
2. Role of assessment
 - Formative assessment
 - Summative assessment
 - Continuous assessment vs. Final assessment
3. Validity and reliability issues
4. Selecting assessment using Bloom's Taxonomy

In this section, we will:



Objectives

- *Define* the term 'assessment' and 'e-assessment'.
- *Explain* the role of assessment.
- *Describe* the main modes of assessment.
- *Outline* the procedures to ensure a high degree of validity and reliability of assessment results.

The Role of Assessment

Assessment: a general term that includes the full range of procedures used to gain information about student learning. . . and the formation of value judgements concerning learning process . . (Linn and Gronlund, 2000, pg. 31-32).

In its broadest sense, e-assessment is the use of information technology for any assessment-related activity. This definition embraces a wide range of student activity ranging from the use of a word processor to on-screen testing. Due to its obvious similarity to e-learning, the term e-assessment is becoming widely used as a generic term to describe the use of computers within the assessment process. E-assessment can be used to assess cognitive and practical abilities. Cognitive abilities are assessed using e-testing software; practical abilities are assessed using e-portfolios or simulation software. *See more information in e-assessment at <http://en.wikipedia.org/wiki/E-assessment>*

It is generally accepted that assessment will propel student learning. Therefore, there must be a match between what is assessed (content) AND how this content is assessed (format) in order to make assessment meaningful and to the meet the instructional goals.



Group
activity

Brainstorming Exercise:

In groups, discuss the role of assessment in general. Apply your thoughts to an ODL situation. Report your results back to the larger group.

Modes of Assessment



Activity

Matching Exercise:

- 1. This kind of assessment is administered during instruction to find out which learning outcomes learners are mastering or which they need help with; it is done in order to shape, and improve performance and behaviour.*
- 2. This kind of assessment is administered at the end of a specified period of time: course, unit or year. This is to identify whether learners have achieved the objectives of the course. Emphasis can be placed on assigning grades.*
- 3. This assessment is given to compare learners' score with the average score of the other students in the class. The teacher can include a large number of easy items.*
- 4. This assessment is given to compare learner performance against a standard or a set of performance tasks. A learner's outcome is dependent on what he/she can do – what objectives each learner has mastered. The facilitator can use some very easy and some very difficult items.*
- 5. This assessment is based on authentic tasks that require students to show what they can do. Learners have to create responses to any given problems and be able to defend their positions. At times learners must demonstrate their ability in real life contexts while working on projects, or designing something. This encourages higher analytic and critical thinking.*

For each of the descriptions above:

Match the description with the mode of assessment as indicated below.

- A. Criterion-referenced Assessment*
- B. Formative Assessment*
- C. Norm-referenced Assessment*
- D. Performance-based Assessment*
- E. Summative or Final Assessment*

Types of Assessment in ODL

Remember that the learning style (of the learner) is also a major consideration. See *Types of Online Assessment*: <http://ss-dev.air.org:8090/eric/docs/pfile03.htm#role>

Issues Related to Validity and Reliability

There are two other factors that contribute to the effectiveness of assessment, namely: *reliability* and *validity*.



Terminology

- Reliability:** is related to the consistency of assessment scores over time and between and among raters.
- Refers to the assessment obtained with an assessment instrument.
 - Consistency of test scores or assessment results from one measurement to another.
 - Inter rates – consistency of scores between raters.
 - Intra rater – consistency of scores given by the same rater at different times.
- Validity:** is related to the appropriateness of the inferences that are made on the basis of the results of assessment.
- Accuracy.
 - Criterion-related: concerned with adequacy and appropriateness of the interpretation and use of assessment results.
 - Content-related: how well the sample tasks are representative of the domain of tasks or content to be measured.
 - Construct-related: The correspondence between achievement test items and the instruction for which the test is built.
 - Does the test measure what it sets out to measure?

When evaluating it is sometimes helpful to keep the following two questions in mind:

- 1 Are people doing (learning) what they are supposed to be doing (learning)? – Validity
- 2 Are people doing (learning) it well? – Reliability

In order to ensure a high degree of *reliability* and *validity* there are several approaches the facilitator can utilize.

- How can the facilitator improve *Reliability*?
 - Avoid ambiguous questions and directions or instructions.
 - Sample more items with similar content.
 - Use well defined scoring/marking schemes.
 - Train raters/markers in an effort to standardize marking or interpretation of students' work
- How can the facilitator improve *Validity*?
 - Design a table of specifications.
 - Test only what is taught.
 - Consider 'for whom' and 'for what'.
 - Ensure that instructions are clear.
 - Use item types that enhance reliability of tests – both subjective and objective items.
 - Ensure appropriate sampling content.
 - Determine which low discriminating items to discard after item analysis.
 - Pay attention to scoring procedures and test administration.

Gronlund (2000) points out: “The degree of *validity* is the single most important aspect of a test”. Furthermore, the teacher must be aware of the many factors which may influence the validity of tests measurement, or evaluation results at any given time in the assessment process. Therefore, the teacher must pay attention to:

1. the test;
2. administration and scoring;
3. pupil's responses;
4. the group and the criterion.



Note it! /
Key Points

- *Integrate assessment and instruction in order to support student learning. This will promote a high degree of validity and reliability of the educational decisions we make that can impact the learners' future.*
- *Specify the purpose of the assessment.*
- *Use a variety of assessments as appropriate.*
- *Communicate the criteria.*
- *Provide timely feedback.*
- *Use appropriate grading procedures.*



Activity

Journal Tasks:

- A. *Utilise the factors outlined by Gronlund, 1998, 17 -27; Chapter 11:*
1. *Outline procedures you can follow to enhance the validity and reliability of recent assessment results.*
 2. *Find ONE other reference related to the topic and discuss the main ideas with a colleague.*
- B. *Explore the merits of ipsative (self-reporting) assessment.*
- C. *Apart from the four modes of assessment dealt with in Activity 1, diagnostic assessment is also important:*
1. *Describe Diagnostic Assessment*
 2. *Explain why Diagnostic Assessment would be useful to you as a facilitator / tutor*
- D. *Design an assessment, taking care to indicate the following:*
1. *Type*
 2. *Subject Area*
 3. *Topic (s)*
 4. *Objectives: (Please indicate the levels/Bloom's Taxonomy)*
 5. *Items: (Ensure each item is matched with one of your stated objective; try to include at least three types forms)*



Note it!

Assessment Checklist:

This is based on the views of Ebel & Frisbie, 1991; Gronlund 1998.

Have you...

- decided on the purpose of the assessment?*
- identified learning outcomes or objectives?*
- prepared test specifications?*
- constructed items which match the learning outcomes or objectives?*
- reviewed items?*
- edited items?*
- organized a test?*

Planning and Writing Assessment in ODL



Objectives

In this section, we will:

- *Discuss* issues relating to planning and writing assessments.
- *Identify* self assessment test techniques.
- *Design* diagnostic type self assessment questions.
- *Give examples* of what to test in self assessment formats.
- *Explain* the purposes of tutor-marked assignments.
- *Select and write* appropriate tasks for preparing tutor-marked assignments.
- *Identify* criteria for preparing marking guides/schemes.
- *Develop* models for given tutor-marked assignments.

Assessment of student learning outcomes is primarily a programme level responsibility. This is frequently embodied in observation, measurement and analysis of student achievement of demonstrable learning outcomes as stated in intended course goals, objectives, or competencies.

An assessment plan must be adapted or developed in order to achieve effectiveness, continuity and sustainability of the assessment process. Course outcome assessment activities need to integrated components of any assessment plan.

Introduction

It is worth noting that assessment in ODL adheres to the same guiding principles as face to face assessment. Therefore the following should be considered in planning and writing assessment for ODL.

- Is there a commonly accepted policy on the method of ODL course assessment?
- Is there a commonly accepted marking scheme?
- What are the individual parts of assessment in each course?
- What is the process of selecting the appropriate assessment?
- Does assessment contribute to the fulfilment of learning objectives?
- Does assessment correspond to workload (credits)?
- Are there specific marking criteria for each individual piece of assessment?
- Is the student informed about the assessment criteria and marking scheme?
- Is there provision for timely feedback? What is the form of feedback?
- Are there clear examination procedures?
- Are there effective ways in place to identify impersonation and plagiarism?

Assessment of Student Outcomes



Note it! /
Key Points

- 1 A systematic approach to assessment integrates a complete cycle of the following general components:
 - *Program goals*
 - *Measurable objectives or standards*
 - *Valid, reliable assessment measures*
 - *Course curricular reference(s)*
 - *Time frame for implementation*
 - *Plan for collection and analysis of results*
 - *Action plan for change or improvement*
 - *Results reporting*
 - *Budget and/or planning implications*
- 2 *A systematic approach to assessment should also engage techniques for measuring prior learning, intended outcomes and value added; provide for documentation of what learners know, and what they can do as a result of learning experiences.*
- 3 *Any assessment plan needs to embrace continuous or frequent assessment through various means of observation, measurement, and analysis of intended outcomes. These assessment components assist learning achievement, and assess learner progress and achievement.*
- 4 *Learning outcome measures should establish a foundation for entering sequential courses, insure compatibility with campus based courses, and provide an indication of integrity of student work and the credibility of the specific course.*
- 5 *Students need to be provided with systematic, constructive, frequent and timely feedback throughout the outcomes assessment process.*
- 6 *Course assessment results should provide documentation of student achievement that is applicable to measurement of program goals achievement.*

Learning activities need to be organized around demonstrable learning outcomes embedded in the course components including; course delivery mode, pedagogy, content, organization, and evaluation. It means therefore that:

- 1 Learning outcomes need to
 - address both content mastery and increased learning skills.

- be described in observable, measurable and achievable terms
 - be assessed in a way which is relevant to the course content, the learner's situation, the learning design and the distance delivery media or system.
 - provide the design basis for developing educational experiences.
 - be reviewed regularly to assure their clarity, utility and appropriateness for the learners.
- 2 Learning activities for the modes of assessment need to be responsive to the learning needs of individual learners.
 - 3 Assessments of outcomes are most effective when learners help shape the learning outcomes and how they are achieved.
 - 4 Achievements of intended learning outcomes need to be facilitated through selection of consistent and compatible learning design, and media or delivery system.
 - 5 Assessment of learning needs to be timely, appropriate and responsive to the needs of the learner.



Group activity

Get into small groups. Your facilitator will provide sample materials of assessments and s/he will also provide copies of Bloom's Taxonomy of Learning.

1. *Read through the sample materials and critique them according to how well they measure learning outcomes using Bloom's taxonomy (or any other taxonomy you may be familiar with such as Dick and Carey or Romizowski). Report back to the group by highlighting some of your findings on a flipchart or whiteboard.*
2. *Create your own simple assessment of your choice using the objectives or outcomes of your choice (be sure to specify which style (Bloom, Dick & Carey etc..) you are using. In order to do this assessment make sure you explicitly write:*
 - a. *the outcomes or objectives the assessment is designed to measure*
 - b. *the instructions to the students on how the assessment is to work*
 - c. *how much time the students have to complete the assessment*
 - d. *how the students will be evaluated? (i.e. does spelling and grammar count? Should they show their work?)*

An example of a "simple" assessment is found in the toolkit.



Note it!

The word “simple” above is in quotation marks because even the simplest of assessments can be complex. We are, after all, assessing human behaviour which is complex. The golf ball putting example in the toolkit is an example of a seemingly simple assessment that, when done properly, can be exceedingly complex.

References, Web Resources and Resource Files

Links to Useful Resources:

<http://en.wikipedia.org/wiki/Assessment>

http://www.mcli.dist.maricopa.edu/ae0/al_what.html

<http://en.wikipedia.org/wiki/E-a>

<http://apu.gcal.ac.uk/ciced/Ch21.html>

<http://www.collegeboard.com/student/testing/ap/biology/samp.html?biology>

http://www.sddu.leeds.ac.uk/online_resources/assessment/administration/marking.htm

http://owll.massey.ac.nz/aw_assessment_1.htm

<http://www.gcsesciencepastpapers.com/sci-examples.htm>

http://wikieducator.org/images/1/1f/Freeman_Example_75.pdf

Resource Files:

PowerPoint presentation on Assessment of ODL module:

[http://www.wikieducator.org/images/6/6d/Assessment in ODL Module.pdf](http://www.wikieducator.org/images/6/6d/Assessment_in_ODL_Module.pdf)

Handouts on assessment:

[http://wikieducator.org/Image:Handouts for Assessment in ODL Module.pdf](http://wikieducator.org/Image:Handouts_for_Assessment_in_ODL_Module.pdf)

Facilitator's Resource Pack:

[http://www.wikieducator.org/Image:Assessment in ODL Resource Pack.pdf](http://www.wikieducator.org/Image:Assessment_in_ODL_Resource_Pack.pdf)

The Process of Assessment:

[http://www.wikieducator.org/Image:The Process of Assessment.pdf](http://www.wikieducator.org/Image:The_Process_of_Assessment.pdf)

**Reading*****References:***

Angelo, T. & Cross, P. (1993). Classroom assessment techniques: A handbook for college teachers. San Francisco: Jossey-Bass Publishers.

Commonwealth of Learning. (2005). Creating Learning Materials for Open and Distance Learning. A Handbook for Authors and Instructional Designers.

Crump, C. (2005). Designing meaningful and fair tests and assignments: A handbook for teachers. Antigua & Barbuda: Printing and Publishing Co.

Gronlund, N. (1998). Assessment of student achievement. (6th Ed.). Boston: Allyn & Bacon.

Willis, B. (1993). Distance education: A practical guide. Englewood Cliffs, NJ: Educational Technology Publications.

Module 8

Developing a Student Guide

Introduction

Students/learners often need guidance and support during the learning process. As a tutor you are probably familiar with the process of creating various types of student materials for the courses you deliver. Some of the materials include handouts, course outlines, questions, assignments and activities to name a few. These materials assist both tutors and learners. They assist you the tutor in the delivery of the course and they assist the learner in the process of understanding the course content and developing the skills and competencies relevant to the course.

Creating a student guide for online and distance learning is similar to the process of creating the materials discussed above. In this module you will learn about the principles and processes involved in developing a student guide. You will also be given the opportunity to engage in the practical application of the principles and ideas covered in this module.

Upon completion of this module you will be able to:



Outcomes

- *Identify* the characteristics of an effective student guide.
- *Distinguish* between the types of student guides.
- *Discuss* the principles for developing a student guide.
- *Develop* an effective student guide.



Activity

- 1 Identify four types of learner support materials that you have previously produced for one of your courses.
- 2 Explain the purpose these materials serve in aiding the learner.

What is a Student Guide?

There are various definitions for the term *Student Guide*. However in the context of open and distance learning (ODL), a student guide is a tool that promotes independent learning, learner interactivity and deep learning in the student/learner.

A student guide is a resource that provides academic and administrative learner support throughout the course. It generally includes information about the topics or areas being covered in a course, self-study activities, examples and exercises that promote independent learning and assist the learner in further understanding of course materials.

Purpose of a Student Guide

The purpose of the student guide is to assist the student in interactive, self-directed learning. In ODL the tutor must provide support for the learner however, creating a situation of learned dependency is undesirable. Therefore, the Student Guide offers the learner an opportunity for independent learning and teaches them the invaluable skill of how to learn. The learner also develops a unique set of technical, research and critical thinking skills that will enable him/her to continue to a high level of thinking and learning following the conclusion of the course.



Tip

Study guides are necessary for promoting self-directed learning!



Activity

Discuss whether or not the use of a learner's guide makes a difference to learning in an ODL environment.

Suggest four reasons to justify your view.

Types of Student Guides

From the units above, we have come to see how important a student guide is in

ODL. It supplements the role of a tutor who is often not there in a distance learning programme. However we must consider that programmes meet varying needs and are delivered in various modes and contexts. This has implications on the type(s) of student guide(s) that will be selected for use. In ODL we can prepare student guides in an electronic or print format. Below is some useful information about the use of electronic and print formats.

Advantages of Print Material: <http://www.uidaho.edu/eo/dist7.html>

Instructional Possibilities of the Internet:
<http://www.uidaho.edu/eo/dist6.html#possibilities>

There are two types of student guides:

1 Academic Guides

This is a guide used to support the learning process directly. Typically, this type of guide includes information related to the following areas:

- a) Learning Strategies
- b) Outcomes
- c) Assessment
- d) Content
- e) Learning tools

2 Administrative Guides

This type of guide includes information related to the general principles and policies of the institution. The content of this type of guide will vary from institution to institution. However, critical aspects that should be included are:

- a Testing and examination regulations
- b How to obtain technical assistance
- c Means of obtaining financial assistance
- d Policies related to assignments
- e Policies related to absenteeism/dropout

Principles in Developing ODL Student Guides

As instructors we have frequently prepared materials to guide students' work, only they were not structured in the way that the ODL student guides should be structured. The student guides in the ODL environment should follow special principles that are designed to communicate to the learners in a clear and interactive manner the information that the learners need.

Indeed, as well as being informative, a student guide should be enjoyable for

the learners to read. A student guide is not the material itself, but a tool to ensure that the learner navigates his/her way through the learning process in an effective and user-friendly manner.



Tip

Remember, learners should ENJOY reading and using the course materials!

Rowntree (2000) highlights the importance of thinking about learners' needs when developing ODL materials. He makes critical reference to fostering learners' autonomy in order to promote their self-actualisation.

For more information, see the following:

Derek Rowntree

(http://iet.open.ac.uk/pp/D.G.F.Rowentree/DL_course_develpt.html)

Important Guidelines:

- Write materials in a way that nurtures learning
- Use the active voice –
 - The active voice creates a different tone and makes writing more lively, more dynamic and more readable. For example: 'Write sentences in the active voice' is more engaging than 'Sentences should be written in the active voice.'
- Write in a reader-friendly style
 - Use a 'tutor's voice' rather than a 'lecturer's voice' – be friendly and conversational.
 - Find a tone that is inclusive and personal, without losing academic rigour.
 - Ask questions and create a sense of interaction between you and your learners.
- Write simple rather than complex sentences. We can still communicate complex ideas in simple sentences. Generally it is easier to read and understand short sentences that flow smoothly and develop logically.
- Consider your language – if we use technical terms with jargon which students don't understand we are not writing inclusively. If technical terms are necessary and you think that students may not understand them, re-introduce them as often as appropriate.
- Write in a way that is gender-balanced and racially sensitive.
- Make use of access devices in order to direct learners to additional information.

For more information, please see Developing Print-based Resources
<http://www.scu.edu.au/services/tl/pathways06/developing/developing3.html>



Tip

Remember, ODL materials have a fairly complex structure and access devices help learners find their way around the materials!

Creating Content for ODL Student Guides

The same principles that were covered in Module 5 of this manual must again be applied when creating a student guide for ODL. In developing an effective ODL student guide careful structuring and designing is required considering the varying needs and learning styles of learners. After a guide is developed and piloted, get the feedback of students and teachers to modify and refine it.



Activity

Take a Tour!

Peruse the following website: [Preparing Support Materials](http://www1.worldbank.org/disted/Technology/print_recorded/study-02.html) (http://www1.worldbank.org/disted/Technology/print_recorded/study-02.html) and respond to the following questions:

- *You are developing a student guide. Provide examples of two ways that you would incorporate and support the internal mechanisms of learning discussed in the article.*
- *Examine the sample guide and template provided in your Seminar package and evaluate it using the principles learned and the toolkit below.*

You can view samples of other student guides at the sites below:

McGraw-Hill Sample Guide:

http://highered.mcgraw-hill.com/sites/0072396881/student_view0/sample_study_guide_chapter.html

Open University sample:

<http://www.open.ac.uk/courses/tasters/H804/objects/d1654.pdf>

Open University Good Study Guide:

<http://www.open.ac.uk/goodstudyguide/pages/downloads.html>

Student Guide Toolkits

You should now know the principles and steps you need to take develop a student's guide. These principles will give you some ideas on what a toolkit for developing a student guide should contain. In this section, we will be looking at developing a toolkit that we need to develop and use it as our checklist or

toolkit. You can use this toolkit to ensure consistency and clarity of the student guide. Your toolkit is a checklist that you can refer and adhere to when developing a student guide.

Checklist/Toolkit Items

The following toolkit is organized into three stages. Namely:

- 1 Planning
- 2 Content Development
- 3 Finalising and Distribution

Note that each stage is a pre-requisite for the stage that follows.

Now let's take a look at what is contained in each stage. Refer to the link below to view the list:

Student Guide Checklist –

http://www.wikieducator.org/images/7/78/Student_Guide_Checklist.pdf

The above checklist is not exhaustive, but can help give you an idea on what to do when you are given the responsibility to develop student guides. It is very helpful to always make the learner a priority in the process. ***Be flexible.*** You can upgrade or modify your checklist from time to time depending on the context issues and requirements your institution impose. Also be reminded that this toolkit should be consistent with the principles for developing ODL study guides as mentioned earlier in this module.



Activity

Develop or adapt your own student guide for a course you teach. You may use the sample guide and checklist provided above. You may also modify the checklist as needed.

Module summary



Summary

In this module we looked at what a student guide is, its purpose and types of student guides that can be used for teaching and learning purposes in ODL.

This module has also introduced you to the guiding principles that ODL educators could use in the process of developing a student guide. The section on steps in developing a guide provided some practical logical action steps (which should be in line with the set principles) that are useful in ensuring you are on the right path in the process. The content and characteristics of a study guide showed you what a guide looks like and what needs to be included in it while at the same time satisfying the related principles and purposes. The toolkit in this module is your regular reference point. It is also your checklist and measuring tool.

Overall you need to remember the fact that a student guide assists the learner in his/her journey to success in a course or programme of study. Remember the information in this module is not exhaustive. You can add and modify the information in this module to suit your own context.

References, Web Resources and Resource Files



Reading

Links to Useful Resources:

Study Guides & Strategies:

<http://www.studygs.net>

Providing Learner Support:

<http://www.british-learning.com/PDF/learnersupportguide.pdf>

Knowledge-Based Instructional Design:

<http://www.scu.edu.au/services/tl/pathways/pathways06/developing/developing3.html>

Other Resources:

<http://www.academicresourcecenter.net/curriculum/glossary.aspx>

Resource Files:

Student Guide Development Presentation:

http://www.wikieducator.org/Image:Developing_a_Student_Guide.pdf

Student Resources:

http://www.wikieducator.org/images/b/bc/Module_8_Student_Resources.pdf

Student Resources (for web-based training):

http://www.wikieducator.org/images/3/39/Module_8_Student_Resources2.pdf

Facilitator Resources:

http://www.wikieducator.org/images/7/7b/Plan_for_Workshop_Module_4.pdf

References:

Rowntree, Derek (2000). Teaching for self instruction: A Practical Guide. Nichols Pub. Co: Michigan.

Module 9

Relevant Technologies

Principles for determining relevance of technology



Outcomes

Upon completion of this module you will be able to:

- *Apply* relevant principles to determine the most appropriate mix of media and technology in the design and delivery of ODL courses.
- *Compare and contrast* between print, audio/video and computer technologies.
- *Determine* the scope, effectiveness and applicability of each of these technologies.
- *Differentiate* between online and blended learning.
- *Associate* relevant technology to the respective chosen methodology.
- *Determine* the benefits and limitations of each of these technologies.

Overview

It is important to realise that media and technology do not necessarily differ in their effectiveness. They all have very peculiar strengths and limitations. However, a particular subject or topic may lend itself to a particular medium. Media and technology are primarily used for two purposes in the context of Open and Distance Learning (ODL), namely: to distribute learning content to learners; and to stimulate and support learning by means of one-way or two-way communication.

Our basic aim as educators should therefore be to determine the most appropriate mix of media and technology for a given learning outcome. The following principles and questions should guide decision-making in this process.

Principle	Description	Guiding Questions
Learner Profile	Media and technology need to fit with learners' needs and realities	<ul style="list-style-type: none"> • How do they learn? • What are their motivational levels? • What learning difficulties do they normally face and how can technology be used to address this? • Do they have access to the required technology? If not, will they be able to acquire it? • Is there a distribution issue? • Do they have the skills to use the technology? • Do they have relevant prior learning?
Curriculum and Type of Material	Media and technology need to be appropriate for the curriculum and for teaching effectiveness	<ul style="list-style-type: none"> • Is the content structured or unstructured? • How immediate is the need since development of structured content is generally more time-consuming and more costly? • Will delivery be synchronous or asynchronous? • What is the lifespan of the course materials? • What is the size of the audience?
Capabilities of the media and technology	Media and technology should match the needs of the learners	<ul style="list-style-type: none"> • Is this the most appropriate technology to achieve learning outcomes? • How proven is the technology? • At what speed can it be updated/replaced? • How difficult/costly will it be to maintain the technology? • Is there in-house capacity to maintain the technology or will it be outsourced? • Does it cater for interactivity? • Will the technology stimulate/motivate learners? • Can it be used for feedback to learners? • Will students be able to assess their progress?
Cost and time to produce content	Media and technology must be affordable for the institution and the learner	<ul style="list-style-type: none"> • Do you have the time to produce the content? • Can you afford the preferred development and delivery model?
Resources	Essential resources should be available	<ul style="list-style-type: none"> • Do you have the necessary human, financial and physical resources to achieve this? • Is special equipment required? • Do staff need time to develop new skills?

Figure 15



Reflection

Remember, a careful blend of media and technology drawing on their individual strengths and minimising their individual limitations is likely to produce the best results. Try and find a balance between quality and cost!

Three Main Categories of Technology

Upon completion of this section you will be able to:

- Identify three categories of technologies
- List and explain three advantages and disadvantages for each category
- Cite examples of how the use of each category in a given educational scenario is good or bad and why.

Print

<i>Print Material</i>		
<p>Print-based courses, or ‘correspondence courses’, are perhaps the oldest delivery method for distance education courses, having been available to students and learners for well over 100 years.</p> <p>The more traditional print courses are provided entirely on paper. Printed course books, course guides, letters, and comments on assignments are some examples.</p> <p>Print courses are usually delivered via the mail, but some also have e-mail, telephone or fax options to enhance communication between student and instructor.</p>		
Advantages	Disadvantages	Guidelines for Incorporation
<ul style="list-style-type: none"> • <i>Extremely portable - materials can be used in any location</i> • <i>High comfort level – most students are very comfortable using print materials to learn</i> • <i>Cost effective- materials can be created and duplicated with little expense</i> • <i>Readily available</i> 	<ul style="list-style-type: none"> • <i>Lacks interaction - materials do not generally provide built-in interaction. Additional technologies, such as e-mail, must be supplemented</i> • <i>No audio/visual elements – materials are static and are not appropriate for teaching languages and visual concepts</i> • <i>Requires reading skills – if the learners are non-readers or language skills are required, print materials will not be effective</i> • <i>Time delay – it may take days or weeks for printed matter to travel between student and teacher.</i> 	<ul style="list-style-type: none"> • <i>Distribute print material well in advance. Although the mail system is generally reliable, issues may arise if the print materials are not distributed well enough in advance</i> • <i>Include clear instructions for use. Students need to know exactly which print materials they are responsible for reading and the specified timeline. A good rule of thumb is to always place a one-page instruction sheet on top of the distance learning package entitled: “Start Here” in large letters. Learners will refer to this document frequently so all the vital information will go on it.</i> • <i>Require interactions. Print materials are inherently non-interactive. Therefore, you must design for the required interactions. In some cases, this may mean a specified timeline for e-mail messages, or a required number of postings to a Listserv.</i> • <i>Specify a timeline. Distribute a timeline for students to help them organize their study learning activities.</i>

Figure 16

Media

Audio/visual material includes:

- Radio
- Satellite
- Cable/Public Television
- Video cassettes
- Internet
- CD-ROM; DVD; disc
- Audio cassettes
- Live video streaming
- Video-conference / audio conference

A brief description of each delivery method is given below:

Radio: Scheduled broadcasts for various subject areas.

Satellite: Courses offered via a satellite network require students to travel to a specified location in order to view and participate in various courses.

Video cassettes (VCs): VCs are mailed to the students who can then view the course information with a video cassette recorder (VCR).

Audio Cassettes: Like video cassettes, audio cassettes are often mailed to learners and can contain lectures, tutorials or administrative information. In language courses they are often used in face to face sessions or at local tutorial centres.

Cable/Public Television: Some classes are broadcast on cable systems and/or public television channels, generally on regularly scheduled days and times on a designated channel. Stations may replay the courses at varying times to enable participation with greater convenience, and of course, it's always possible to record the programs for later viewing.

Videotape: Courses available on videotape mean that videotapes will be shipped to you at your mailing address. To participate, you need access to a television equipped with a VCR.

Audio conference: Audio is often thought of as the most important part of any kind of teleconference. It is sometimes considered a conference call, but with many optional features available and an almost limitless number of individuals being able to simultaneously participate in the same event. Basic technology needs are simply a telephone. Audio-conferencing is an easy, economical way to bring many people together to meet, learn, and teach.

Videoconference: A videoconference is a two-way interactive event where video and audio is simultaneously transmitted to individuals at sites in different locations. It can be 'point to point' which connects just two sites together, or it can be 'multipoint' where individuals located at many sites can see and hear those at all of the other sites. These virtual classrooms and meetings can take place across the campus or across the world. Videoconferencing is not limited to a single technology, as bridging services allow ISDN, ATM, and/or IP to join together for a single event. IP Videoconferencing requires the use of Internet and a

computer which has been specifically set-up for videoconferencing. Satellite delivery is also a form of videoconferencing, but it is not two-way video, in that the program is down linked to participating locations.

<i>Audio Technologies</i>		
The most important part of any teleconference.		
Advantages	Disadvantages	Guidelines for Incorporation
<ul style="list-style-type: none"> • <i>Inexpensive.</i> Audio/voice technologies are increasingly inexpensive. • <i>Easily accessible.</i> Almost every home in the OECD has a telephone and, even in developing countries, most people have access to a phone. In addition, most students have access to an audiotape player in their home or in a car. • <i>Easy to use.</i> Almost everyone is comfortable using a telephone and an audio cassette. With voice technologies, there is no software to install and no hardware to configure! • The expansion of voice over IP (VOIP) as well as the ubiquitous use of cell phones in developing countries is creating a “voice renaissance” 	<ul style="list-style-type: none"> • <i>May require scheduling.</i> Some of the voice technologies (such as audio-conferences) are synchronous, meaning that they must be scheduled at a convenient time for the students and teacher. • <i>Not conducive to visual information.</i> Many students find it hard to focus and learn strictly through audio input. In addition, audio-only format restricts the content that can be conveyed (abstract concepts like maths or dancing are very difficult to convey through audio). • <i>May be impersonal.</i> With audio-only interactions, there is no eye contact and no body language. Students may be “turned off” by a talking box. • Depending on the technology and infrastructure communication is often only ½ duplex which means only one person can speak at a time. 	<ul style="list-style-type: none"> • <i>Distribute visual material in advance.</i> If an audio-conference is scheduled, handouts or other visual materials that might be of value during the presentation should be distributed well in advance. • <i>Set communication protocols.</i> Since the participants will not be able to see each other, it is important to agree on protocols to help identify the speaker in an audio-conference. In most cases, it is advisable to instruct all speakers to state their name before making comments. For example, “This is Mary, and I would like to comment about...” • <i>Encourage interaction.</i> In an audio-conference, interactions should be built into the format. For example, instructors should call on specific students, instruct students to take turns asking questions, and make sure that one student is not allowed to monopolize the conversation. With both audio-conferences and audiotape delivery, students should be required to use e-mail, fax, or voicemail to engage in further interactions with each other and the instructor.

<i>Audio Technologies</i>		
The most important part of any teleconference.		
Advantages	Disadvantages	Guidelines for Incorporation
		<ul style="list-style-type: none"> • With both audio-conferences and audiotape delivery, students should be required to use e-mail, fax, or voicemail to engage in further interactions with each other and the instructor. • <i>Record audio-conference on audiotapes.</i> It is very easy to record an audio-conference. That way, you can distribute the tapes for students who were unable to participate in the conference and for those who would like to review the content. • <i>Get to know the students.</i> If possible, seek ways to get to know the students, such as visiting all of the sites, gathering the students together in one place, or exchanging photographs or videotapes.

Figure 17

<i>Video Technologies</i>		
<p>Interactive video-conferencing allows students and faculty at multiple locations to see, hear, and interact with one another.</p>		
Advantages	Disadvantages	Guidelines for Incorporation
<ul style="list-style-type: none"> • <i>Allows both audio and video communications.</i> Video technologies can provide the visual and audio realism of a face-to-face class. It is generally considered the “next best thing to being there.” • <i>Facilitates personal feelings.</i> Video technologies enable students and instructors to see some facial expressions and body language, adding personalities to communication. • <i>Enable high levels of interaction.</i> Most video communications are synchronous, allowing high degrees of interactions, questions and answers, etc. 	<ul style="list-style-type: none"> • <i>May be expensive.</i> Cameras and editing equipment can be expensive. In addition, the infrastructure at each site and the links between sites can be costly. • <i>Requires a great deal of planning and preparation.</i> To be effective, the camera crews and the instructor must practice and become a team. Faculty members generally need practice and training to be effective in this domain. • <i>Must be scheduled.</i> Most videoconferences are not spontaneous. Instead, they must be planned and the necessary resources must be scheduled. • <i>Requires technical support.</i> Because of the complexity of video recording, mixing, and transmission, a technical support team is required. In addition, site facilitators are necessary to ensure the equipment works properly at the receiving stations. 	<ul style="list-style-type: none"> • <i>Avoid the “talking head”.</i> “The early days of distance education witnessed the inclusion of the worst aspects of the old passive/lecture paradigm, which were even more deadly from a distance than in person” (Parker, 1997, 10). Talking head refers to simply videotaping the instructor while she or he is talking. Instead, try to vary the camera angle, include still images of appropriate graphics, and encourage student interactions. • <i>Practice with the cameras and the crew before the lesson.</i> It is important to plan practice times for the instructor and the camera crew. By working together, they can anticipate each other’s needs and provide the best possible transmissions. • <i>Encourage interactions.</i> Interactions can be added to video-based delivery in many ways. If the lessons are two-way, questions and other types of interactions can be included. If they are one-way video, interactions can be added through e-mail messages or the telephone. • <i>Use the best cameras possible.</i> The old saying “garbage in; garbage out” is very true of video. The very best possible quality equipment should be used. • <i>Ensure quality audio.</i> Losses in audio quality will be noticeable long before losses in video quality. Always ensure good recording, playback, and speaker quality.

Figure 18

Types of Technologies in the Online Environments

A brief description of each delivery method is given below:

Computer CD-ROM/Disk: Some classes are offered on computer disks, CD-ROMs, or, more recently, DVDs. The disks and study materials are mailed to your home. You need access to a computer to view the course materials.

Internet: Courses delivered over the Internet often, but not always, use the World Wide Web. They may include material to read online, exercises to complete online using interactive forms, discussion forums to exchange ideas with the professor and other students in the class, and many other types of instructional activities. Most Internet courses are asynchronous, meaning there are no live sessions or fixed meeting times, which makes this method especially attractive to working adults with busy schedules. Students can participate from any computer with an Internet connection.

Live Video Streaming: Video streaming is a common method for distributing live or stored video over the Internet. For live streaming, the instructor's lectures or presentations are digitally encoded and distributed over the network in real time. Class members can watch and listen to the instructor using a networked computer and media player software, such as Windows Media Player or RealPlayer. Some video streaming classes have a toll-free telephone number so students can call in with questions. Live streaming classes adhere to a fixed schedule of meeting times. Some are also archived, which means you can watch the video at a later date and time if you happen to miss a session.

Web Conference: Web conferencing is the combination of using a web browser for visuals and an audio-conference for discussion. Students and instructors can show and receive graphics, draw, and type, demonstrate web sites, share documents and use web chat. Basic technology needs are a computer, a web browser, an Internet connection, and a telephone. To participate in a web conference, you simply dial in to the telephone conference call, and point your browser to the pre-assigned web site. Only those who log-in can share the content and communicate with each other. All program visuals are available to all participants at the same time. You can communicate, collaborate, and receive real-time feedback. Participants connect from offices, homes, meeting rooms or anywhere else with access to the Internet and a phone line.

Online: Online courses, also often referred to as web courses, are usually defined as courses which are offered over the Internet. Basic technology needs are a computer, a web browser and an Internet connection. Program and course providers will identify the specific technology needs of a specific course (e.g., some courses may require the use of a certain browser version or type of computer). Some, but not all, online courses are offered at 'anytime and anyplace'. This means you are not limited to traditional semester start and end dates and you can take the course from any location (home, office, etc.) with the proper connections. Other courses may have scheduled meeting times where students and/or

instructors are online at the same time. Many terms are used when referring to online distance education programs and courses. These include: 'E-learning', 'web-based training (WBT)' or 'Internet courses'. Also there are products (called Course Management Systems or CMS and Learning Management Systems or LMS) used to design an online course. Examples of brand names of such products include 'WebCT', 'Blackboard' and 'Desire2Learn'. Moodle is an example of an open source version of an LMS which is gaining in popularity with the open source movement.

<i>Computer Technologies</i>		
<p>Computer Disk/CD-ROM/DVD: Some classes are offered on computer disks, CD-ROMs, or, more recently, DVDs. You need access to a computer to view the course materials. Courses delivered over the Internet usually use the World Wide Web. They may include material to read online, exercises to complete online using interactive forms, discussion forums to exchange ideas with the professor/instructor and other students in the class, and many other types of instructional activities. Students can participate from any computer with an Internet connection.</p>		
Advantages	Disadvantages	Guidelines for Incorporation
<ul style="list-style-type: none"> • <i>Allow self-paced instruction.</i> Computers allow learners to proceed at their own pace, receive feedback immediately, and review as often as they like. • <i>May incorporate text, graphics, audio and video.</i> With the trend toward digital audio, digital video, and computer animations, it is easy to incorporate various media into computer programs. • <i>Allow high levels of interactivity.</i> Computer technologies allow embedded questions and interactions, as well as online collaboration. • <i>Provides written record of discussions and instruction.</i> Computer logs can easily be generated for computer interactions in distance learning. • <i>Inexpensive.</i> With access to the Internet, it is relatively inexpensive to participate in computer technologies for distance learning. • <i>Worldwide access.</i> The Internet can be accessed by millions of people throughout the world. There is no other way to reach so many people for so little money. 	<ul style="list-style-type: none"> • <i>Requires hardware and software.</i> At a minimum, a computer and Internet connection are required for most distance learning options that involve computers. • <i>Generally relies on written communications.</i> Although it is possible to include audio and video in computer-based distance learning, most of the communications are in the form of text. • <i>Requires substantial planning.</i> E-mail and other asynchronous computer technologies require a great deal of planning and preparation on the part of the instructor. • <i>Computer viruses.</i> If students send assignments via a computer, there is always a risk of viruses -- especially if they send programs or attached files. • <i>No guaranteed performance.</i> Computer networks are notoriously unreliable. If students wait until the last minute to check their e-mail messages or search the Web, there is always the risk the server may be down or the Web sites may have moved. 	<ul style="list-style-type: none"> • <i>Provide adequate structure and guidelines.</i> The most successful asynchronous projects include deadlines and a structure. • <i>Provide timely feedback to participants.</i> Since the communications in computer-based distance learning are more impersonal than video-based delivery, it is extremely important to provide quick and relevant feedback to students. Tell learners how long it will take them to get feedback for a given query and stick to that plan. For example: 24 hours for emergencies, 48 hours for assignment or exam questions etc. • <i>Get to know the students.</i> If possible, try to meet the students, either in person or through video. In some cases, the students may be able to meet once or twice; if not, videotapes can be sent to students to increase personal communications. • <i>Ensure sufficient technical support.</i> In a perfect world, the computer and the technology would be invisible to the students. It is very important to provide sufficient technical support so that the students can get help when they need it.

Figure 19

<i>Online</i>		
<p>An online course is one in which student and instructor communicate via computers. The assignments, class lectures, documents and responses are on screen. Communication with the instructor and other students in the class is through personal e-mails, bulletin boards and discussions. The syllabus assignment and course materials are provided on screen through web pages or a CMS or LMS like Moodle.</p>		
Advantages	Disadvantages	Guidelines for Incorporation
<ul style="list-style-type: none"> • <i>Better learning resources</i> • <i>More flexible pace of learning</i> • <i>Greater choice of where to study</i> • <i>Increased self-reliance</i> • <i>Improved computer literacy</i> 	<ul style="list-style-type: none"> • <i>Alienating learning experience</i> • <i>Technical Frustration</i> • <i>Inadequate access to computers</i> • <i>Loss of contact with staff</i> • <i>Reduced instruction</i> 	<ul style="list-style-type: none"> • <i>Ensure printed material is at hand in case of computer breakdown</i> • <i>Provide alternate means of contact with staff for timely feedback</i> • <i>Provide technical support</i>

Figure 20



Please match the statements in Column A with the pictures in Column B.

Activity






Column A	Column B
Allows both audio and video communication	
Arguably the oldest delivery method for distance education	
Not conducive for visual information	
Requires hardware and software	
Access to a computer is necessary to view materials	

Figure 21

Blended Learning

Blending Learning is an educational formation that integrates e-Learning techniques including online delivery of materials through web pages, discussion boards and/or email with traditional teaching methods including lectures, in-person discussions, seminars, or tutorials. For example, the instructor of an online course may wish to have students meet once a week via an audio-conference to discuss the last assignment together; or a videoconference can be combined with multiple media: text and graphics can be transmitted with a document camera; computer graphics, web sites, and videotapes can be transmitted and viewed by all students. Some claim that key blended-learning arrangements also involve e-mentoring or e-tutoring. With today's prevalence of high technology in many countries, blended learning often refers specifically to the provision or use of resources which combine e-learning (electronic) or m-learning (mobile) with other educational resources.

The term "blended learning" can also be used to describe arrangements in which "conventional", offline, non-electronic based instruction happens to include online tutoring or mentoring services.

Blending different technologies together in one course often provides a more dynamic learning environment and allows for different options and expressions of educational materials. Each learning institution plans, develops and applies its own delivery methods and mechanisms depending on context and the availability of manageable resources.

Whatever the arrangement, there is a tendency to combine an electronic learning component with some form of human intervention, although the involvement of an e-mentor or an e-tutor does not necessarily need to be in the context of e-learning. E-mentoring or e-tutoring can also be provided as part of a "stand alone" ("un-blended") e-tutoring or e-mentoring arrangement.

This combination of e-tutoring plus conventional learning, although it is a perfectly valid example of blended learning, is the "opposite way round" to most current blended learning arrangements, in that the solution is driven by conventional learning techniques, not by the electronic techniques.

Think about an online course. How often do students interact with one another as well as their tutor? What forms of communication technologies do they utilize? Do they use one or more or a combination of communication technologies for teaching and learning purposes? Imagine a situation where students meet once a week using different forms of combined communication technologies like audio and videoconferencing for learning. This combination is termed as blended learning.

An audio-conference or a videoconference can be facilitated through the application of combined multiple media communication technologies. Examples of combined multiple media technologies for blended delivery and learning are as follows:

- text and graphics transmitted with a document camera
- computer graphics, web sites, and videotapes transmitted and viewed by all students

Researchers Heinze and Procter have developed the following definition for Blended Learning in higher education:

Blended Learning is learning that is facilitated by the effective combination of different modes of delivery, models of teaching and styles of learning, and founded on transparent communication amongst all parties involved with a course.

A major criticism of such a definition revolves around their rigid insistence upon features such as “communication”, “transparency”, “parties” and “courses”. These features do not necessarily have clear or unambiguous meaning in environments outside that of higher (or other institutionalized) education systems. In other words, the definition fails to acknowledge environments where blended learning does not raise issues of “transparency of communication” in the way it is envisaged in the institutional definition. This might refer to artificial intelligence systems, or animal training systems, which can be involved in blended learning since they employ combined resources.

It should also be noted that some authors talk about “hybrid learning” (this seems to be more common in Northern American sources) or “mixed learning”. However, all of these concepts broadly refer to the integration (the “blending”) of e-learning tools and techniques with traditional methods. Two important factors to consider are the time spent on online activities and the amount of technology used.

Blending different learning technologies in a course provides an effective learning environment. It also allows for different delivery options for various ODL courses.

“Pre e-Learning” and “non eLearning” usages

As with many things prefixed with ‘e’- (originally standing for “electronic”, but eventually more specifically applied to the involvement of computer-based or more recently Internet-based technology) the e-learning aspect of blended learning can often mislead the unwary into believing that it is the defining constituent of ‘multi-resource’ educational approaches.

Those involved in school education (as opposed to many of those responsible for developing occupational training resources) are often more familiar with ‘combined resource’ educational tools that do not necessarily involve computer technology. For example:

- Classroom based audio-tape resources (language laboratories);
- Auditorium multimedia visual resources (movie projectors, slideshows, VCRs);
- Textual resources: textbooks, exercise books (although these are obviously the mainstay of traditional school educational resources, they are actually a neglected and under-valued potential component of e-learning-based blended learning);
- Home-learning resources (video recordings, audio recordings);
- Blackboard and whiteboard resources, including high-tech “printing whiteboards” and “online whiteboards”;
- Demonstration resources, including “museum exhibits”, “laboratory experiments”, live theatre, historic re-enactment, hands-on workshops, role-playing, etc;
- Non-instructional education resources, such as examinations, quizzes, test-grading, etc.

The above, whilst they do not include e-learning, are nonetheless potential constituents of a blended learning approach.

Interaction with a human being in blended learning solutions is typically delivered through real-time chat systems or online message boards or e-mail. However, telephone contact with a tutor or trainer may be just as effective and potentially far more reassuring to the learner.

For more information on blended learning see
<http://blendedlearning.wikispaces.com/>



Activity

Working individually, consider your own working environment. Go over the different types of synchronous and asynchronous methods of delivery you are currently using and others that you can use in your context. In any one session that you plan how many types of delivery methods do you employ?

List some disadvantages of online teaching specific to your situation. For every disadvantage you identify, go to a website that has dealt with this situation in a practical way.

Web Resources

Workshop Presentation (PowerPoint):

http://www.wikieducator.org/Training_Educators_to_Design_and_Develop_ODL_Materials/Relevant_Technologies#PowerPoint_Presentation

Workshop Handout (for participants):

http://www.wikieducator.org/images/2/23/Relevant_Tech_WkShop_Handout.odt

Module 10

Course Evaluation

Introduction



Outcomes

Upon completion of this module you will be able to:

- *Define* evaluation.
- *Explain* the importance of evaluation.
- *Mention* the timing for each one of the two types of evaluation.
- *Explain* the procedure followed when conducting evaluation.
- *Distinguish* between evaluation and assessment

What?



Terminology

Evaluation:

Is an integral part of the assessment process. It is the method of assessing the *quality* of the course to ensure it meets *accreditation* standards.

Why?

The main *purpose* is to judge the *effectiveness* of the course, teacher / facilitator / tutor delivery and other academic support. Then *feedback* can be provided to stakeholders in order to facilitate improvement in student learning and behaviour.

When?

Evaluation is divided into *formative* and *summative*.

Formative Evaluation

Formative evaluation takes place **throughout the course** and even before the course begins through pilot testing and focus groups. Asking students for feedback early in a course can be one of the most effective **steps** toward **improving** your teaching because it allows you to respond to the **feedback** while the course is still in **progress**. It is also an important way of ensuring that the course is meeting the **needs** of learners throughout the course and facilitates **changes** if the need arises.



Tip

Two key times to conduct an evaluation of a course in progress is in the first 3-6 weeks of a full semester course or in the first 2-3 weeks of a mini-semester course.

This time frame gives students a reasonable sample of how you teach and how their learning is evaluated to make substantive comments. It allows you time to make adjustments and see their impact.

Summative Evaluation

Summative evaluation is a method of judging the **effectiveness** of a course at the **end** of the course activities. The information acquired can be used in revising aspects of the course and inform new course development.



Tip

Timing is crucial if it is to serve the purpose. It is strongly recommended that it is done just before the final session.



Activity

Pair Work:

- *Distinguish between assessment and evaluation.*
- *Justify why you would want to evaluate this workshop.*
- *Distinguish between formative and summative evaluation.*

Write your thoughts in your journal.

How?

The points below cover the four *main steps* in conducting an early course evaluation:

- 1 Deciding when and how to distribute forms
 - Forms for Faculty
 - Forms for Teacher Assistants
- 2 Preparing and tabulating the data
- 3 Interpreting the results
- 4 Discussing the feedback

By Whom?

- Learners
- Associate Lecturers / Tutors
- Facilitators / Supervisors
- Administrators
- Sponsors and other stakeholders

Forms



Tip

Use a form that allows students to report on issues they consider important to their learning.

The use of simple, open-ended forms can provide lots of useful comments and suggestions and are appropriate in all types of classes. If using Likert scales be sure to only allow respondents 4 choices. This prevents respondents from choosing “the middle of the road” on important opinion questions.

See sample form at http://www.vw.vccs.edu/DLPoll/d_l_course_eval3.asp

Check the list below for possible variables on which you want information:

- *communication skills*
- *organizational skills*
- *enthusiasm*
- *flexibility*
- *attitude toward the student*
- *teacher – student interaction*
- *encouragement of the student*
- *knowledge of the subject*
- *clarity of presentation*
- *course difficulty*
- *assessment approaches*
- *fairness of grading and exams*
- *global student rating*
- *Academic Support Services*



Use information from the suggested readings / web resources and develop an evaluation form.

Group
activity

Module summary



Summary

This module provides us with information on how to conduct course evaluation. To achieve this, the module firstly defines evaluation. Furthermore, it provides information on the exact time when evaluation should be conducted. The module also describes the procedure to be followed and gives a list of stakeholders involved. Finally, it provides us with a sample of the questionnaire we may need to use when evaluating a course.

Web Resources

Course Evaluation presentation (PowerPoint):

http://www.wikieducator.org/images/8/81/PPT_Course_Evaluation.pdf

Module 11

Other Key Issues Associated with ODL Material Development

Introduction

This section is committed to looking at other pertinent issues when developing material for Open and Distance Learning. These include, but are not limited to:

- 1 Quality Assurance Issues
- 2 Intellectual Property Right Issues
- 3 Accreditation of ODL
- 4 Cost Effectiveness and Relevance
- 5 Special Educational Needs

Quality Assurance Issues

Assuring the quality of education provision is a fundamental aspect of gaining and maintaining credibility for programmes, institutions and national systems of higher education worldwide. Despite a long and generally successful track record, open and distance learning (ODL) is still required to prove that the quality of student learning is at least equivalent to face-to-face teaching. A comprehensive quality assurance (QA) system can help accomplish this. QA is designed to prove and improve the quality of an institution's methods, and educational products and outcomes. In ODL this includes developing and producing learning materials, academic programmes, services and support, as well as standards of student learning. A systematic and consistent QA system helps to establish an institution's good reputation and image. It includes defined standards of achievement, documented procedures for all identified processes, established ways of responding to issues and clear accountability for outcomes. The result is greater public confidence, more satisfied students, efficient processes and staff who are confident in their jobs. Students are more

likely to experience better quality instruction, learning materials and interactions with the institution and its staff, leading to enhanced learning outcomes. Satisfied students are more likely to choose that institution again or to recommend it to others.

A framework for managing ODL quality should address:

- General philosophy: Policy and mission statements, ethos and culture of the organization, mottoes, attitudes of staff and levels of staff commitment.
- Products: Learning materials, courses, resources, media, outputs (progression and retention rates, number of graduates), assessment outcomes (pass rates, standards of performance).
- Services: Registration and advisory services, tutoring, counselling, feedback and guidance on learning, support for learner progress, provision and management of study centres and resources, customer service, ICT help desks, responsiveness to issues.
- Support processes: Delivery systems, record keeping, and scheduling, electronic backup, warehousing and stock control, QA procedures.

See article from COL for more information on QA Systems:

http://www.col.org/colweb/webdav/site/myjahiasite/shared/docs/KS2005_QA.pdf

Accreditation of ODL

Intellectual Property Rights

What is intellectual property?

Intellectual property represents the property of your mind or intellect. There are different types of intellectual properties (IP) but our main concern here lies with the issue of *copyright*. That is, the copyright for original material in literature, the arts, film, broadcast, multimedia and computer programs;

Creating IP does not mean you own the rights to it! You must take formal steps to register your IP and obtain the legal rights of ownership or you will have to rely on common law to prove ownership and prior use for non-registered IP.

Note: Registering your IP rights in your own country may not give you international protection. You must apply for this separately.

All writers should develop strategies to protect their IP rights if they do not want their own work reproduced and presented as someone else's.

What must be noted by content developers is that copyright protects only the original expression of ideas, and not the ideas themselves. It protects your original works of art and literature, films, sound recording, broadcasts and computer programs from being copied and being used by another for different purposes.

Material is protected from the time it is first written down, painted or drawn, filmed or taped. Copyright material will also enjoy protection under the laws of the countries who are signatories to the international treaties, of which your country may be a member.

Copyright does not protect you against independent creation of a similar work. Legal actions against such a violation are complicated by the fact that a number of different copyrights may exist in some works - particularly films, broadcasts and multimedia products.

Why do we have copyright?

If anyone needs to use other people's work to create and distribute new materials, then they will need to think about copyright. A copyright protects the writings of a person from being reproduced without the permission of the copyright owner. While educators often find copyright law frustrating and overly restrictive it is important to allow creators to enjoy the fruit of their labour and also to stimulate innovation.

The following are the rights of the author with regards to a piece that they have produced:

- 1 the right of reproduction (i.e., copying),
- 2 the right to create derivative works,
- 3 the right to distribution,
- 4 the right to performance,
- 5 the right to display, and
- 6 the digital transmission performance right.

In view of the above, there is always the major issue of copyright and other intellectual property rights issues that must be given serious consideration when developing material for ODL.

For further reading, go to http://en.wikipedia.org/wiki/Intellectual_property

This page provides you with extensive information on intellectual property. Although it is important that you acquire a wide perception of all that is

covered by the term ‘intellectual property’, it is crucial that you focus on the parts of the text which describes the copyright issues in terms of producing and designing open and distance learning materials. There is a paragraph on the ‘Intellectual property rights in the digital era which you may find as useful information.

For additional information please click on
<http://www.utsystem.edu/OGC/INTELLECTUALPROPERTY/distance.htm>.

This page presents a crash course on copyright with relevant information on ‘Specific Distance Learning Copyright Issues’. It describes clearly the copyright issue in relation to using materials on the internet as well as incorporating images into new works.

There are also frequently asked questions presented here with regards to copyright and these are presented as sub headings with clear and thorough answers following. As a designer of ODL materials these are important issues that you will need to address before you launch into creating and developing your own materials.



Activity

Test your Knowledge of Intellectual Property Rights (IPR). Attempt this quiz before moving on. Click on the link for test
<http://www.lib.utsystem.edu/copyright/test.html>

Cost Effectiveness and Relevance

- Cost effectiveness and relevance of open and distance learning (ODL) has and is a controversial issue ever since the demand of higher education could not be met by the conventional systems. The debate has been on different levels. However, the bottom-line is that cost effectiveness and relevance is a concern of all the stakeholders such as institutional providers, educators, learners and policy makers. Cost effectiveness has economic implications whereas; relevance has implications of quality of ODL programmes, student performance, national development and sustainability of this educational system. The current shift to the use of e-learning technologies has magnified the concern.
- Cost effectiveness of designing and implementing online learning hinges on the availability of free content and relevance to the learner needs. Other related issues are:

- connectivity to free content
 - access to templates such as this document
 - the effectiveness and efficiency of on line learning such as learning objectives
 - research methodologies in terms of reviewing literature strategies
 - ICT/text and self study materials, the learner's cultural differences and the arising challenges that students encounter during the course.
- Affordability - for the registration of course programmes on line, an admission policy should be put in place for students to know the convenient time for the payment of course fees by all means throughout the year. It is also vitally important that on-line learning provide credit opportunities and recognition for the courses taken at the end the entire programme. *For more information on cost effectiveness click onto <http://www.irfol.ac.uk>*



Activity

Attempt this activity before moving on. Click on the link for the quiz. <http://www.irfol.ac.uk>. List down few examples of the advantages of on-line learning.

Special Educational Needs

There are several countries with legislations that require institutions to cater to challenged learners or learners with exceptionalities [hearing, sight, ADD, ADHD etc]. This requires institutions to be anticipatory - to put procedures and practices in place in the expectation that those requiring alternative forms of delivery can gain ready access. Physical access, whilst important, is less problematic than meeting the needs of communication impaired students. Enlarged print, Braille and synthesized speech can be created from digital masters; tactile diagrams can be created. However, what systems will be put in place to ensure the various media - audio, video, text etc can be offered in alternative forms and

their effectiveness monitored? How will teachers be alerted to the needs of communication impaired students?

Web Resources

<http://www.british-learning.com/PDF/learnersupportguide.pdf>

Towards a Culture of Quality (COL):
<http://www.col.org/colweb/site/pid/3992>

Module 12

Facilitating Workshops 101

Introduction

The illiterate of the 21st century will not be those who cannot read and write, but those who cannot learn, unlearn, and relearn – Alvin Toffler

It is hard to believe that Toffler wrote those words nearly 40 years ago. He was certainly prophetic as we see in our daily personal and professional lives. Where 40 years ago most of us could expect to graduate from school and rarely, if ever, consider attending school again we now find that we are continually upgrading ourselves at home and at the workplace. From learning the latest child rearing techniques like teaching your 6-month old sign-language to learning how to use specialized computer software in the workplace we are constantly learning. This learning takes various forms including:

- self-study where we read books or glean information from the internet
- non-formal learning where we meet with colleagues and teach each other
- formal learning in the classroom
- professional development where we learn in semi-formal settings at the workplace

When we think of learning settings we most often jump to the image of formal learning in a classroom. For more than 1000 years that has been the most conspicuous and valued form of learning. However, if you reflect over the last 10 years or so of your career you may realise that most of the learning you have experienced has come in the form of professional development workshops. We have all attended these workshops (in fact you are probably in one now) and have mixed feelings about them. Some have been stellar but, probably most have been interesting but not terribly exciting or awe inspiring.

Have you ever had to facilitate a workshop yourself? Does the thought of facilitating a workshop make you nervous? Learning how to facilitate a workshop is part of the modern worker’s toolkit. The skills learned here as well as while you facilitate workshops will be invaluable. These skills will make you a better learner, a better facilitator a better employee and a better person.

This Module will provide you with the basics for creating, developing and facilitating a workshop. These techniques can be used in both face to face and distance workshops and will also help you to get more out of the workshops you attend as a learner.

This entire Module is based on three simple steps for making any presentation:

Step 1: Tell them what you are going to tell them

Step 2: Tell them

Step 3: Tell them what you told them



Note it

There are quite a number of activities for you to try in the Module and you will notice that most of the activities are group activities. We recognize that for logistical reasons you may not be able to do all of these activities and you may not be able to complete them in groups. Please feel free to adapt the exercises to suit your needs and abilities. For example, you may wish to brainstorm activities and their solutions with a friend or colleague. Don’t hesitate to contact your course registrar if you need some assistance.



Outcomes

Upon completion of this Module you will be able to:

- Name:** the three basic steps of facilitating any learning workshop
- Describe:** what facilitation is and how it differs from traditional teaching.
- Analyze:** the reasons why you are facilitating a workshop and why the learners are attending your workshop
- Compare:** and contrast facilitated learning from traditional

	learning
Demonstrate:	good use of feedback in educational environments
Demonstrate:	proper presentation skills
Select:	and use effective group dynamics skills
Assess:	what are good questions and how and when to answer or ask them
Use	active listening skills to build relationships and foster good group dynamics
Examine	your role as a leader and how you can improve your leadership skills as well as foster leadership skills in others
Apply	the four stages of conflict resolution
Illustrate	why it is important to value people and be valued by other people

What is a facilitator?



Discussion

Get into medium-sized groups (5-6 people) and discuss the similarities and differences of the following roles. See if you can come up with a clear and concise definition for each:

- teacher
- professor
- facilitator

Was it easy to come up with distinctions between the three? What definitions did you arrive at for each?

If your definition for “facilitator” included words like guide, chairperson, helper or leader then you were on the right track. A facilitator is often referred to as “the guide on the side” as opposed to the “sage on the stage”. We are all accustomed to instructors providing us with lectures



followed by readings and exercises. While a facilitator will occasionally assume the role of lecturer it is our job to minimise the time we spend monopolising the stage. For those of us with teaching backgrounds this transition is very difficult to make and it takes a conscious effort as well as a lot of forethought and practice.



Terminology

Wikipedia provides three related definitions for “facilitator”. They are:

- “An individual who enables groups and organisations to work more effectively; to collaborate and achieve synergy. She or he is a ‘content neutral’ party who by not taking sides or expressing or advocating a point of view during the meeting, can advocate for fair, open, and inclusive procedures to accomplish the group’s work”
- “One who contributes structure and process to interactions so groups are able to function effectively and make high-quality decisions. A helper and enabler whose goal is to support others as they achieve exceptional performance”
- “The facilitator’s job is to support everyone to do their best thinking. To do this, the facilitator encourages full participation, promotes mutual understanding and cultivates shared responsibility. By supporting everyone to do their best thinking, a facilitator enables group members to search for inclusive solutions and build sustainable agreements”

As you can see being a good facilitator is a tall order. In addition to being a content expert (although one doesn’t always have to be a content expert) one has to be a good communicator and a diplomat.



Discussion

Get into *new* medium-sized groups (5-6 people) and discuss attributes a good facilitator might need. This might include personal attributes and professional attributes. When you are finished, each group should write their attributes on the common board. Try to prioritise the attributes. Is this possible?

Which attributes are most common? Which appear only once? Are there any attributes that everyone agrees with? Are there any attributes listed that you disagree with?

Some of the attributes you may have listed might include:

- good listener
- know the content area
- good communication skills
- well-groomed
- well-organised
- welcoming
- problem solver
- creative
- good summariser
- diplomatic
- personable
- good time keeper
- speaks clearly
- fun/good sense of humour
- thoughtful
- fast thinker

OK but what does a facilitator actually do?

The key components of facilitation are to:

- engage learners
 - create learner-led environment
 - give and receive feedback
 - handle challenging situations
- use delivery strategies to present and build knowledge
 - use a variety of delivery techniques
 - leverage the teachable moment
 - apply techniques to increase confidence
- design and organize learning experiences
 - apply instructional design principles
 - bring the learning alive
 - focus on outcomes
 - create teaching aids
- self-assess performance
 - share lessons learned and best practices
 - initiate personal development opportunities



Reflection

What challenges might you encounter as a facilitator?

Knowing your group



Group Activity

Find someone with whom you are not yet well acquainted. Get to know each other better by asking questions such as:

- Where are you from? What is the most interesting thing about your home town?
- What do you like to do when you are not working?
- Why are you an interesting person? List reasons.
- If you could have lunch with anyone in the world (living or not), that person would be ...
- What is the most difficult thing you have ever had to learn? To teach?
- Is there something you hope to do but have not done yet?

Create a flipchart to do a 1-minute introduction of your partner.

Getting to know your learners

It may sound like an impossible task but it is important that you learn as much as you can about the group you will be facilitating far in advance of the actual workshop. This amounts a mini-needs assessment which is covered in Modules 3 and 4 of this guide.

Before planning the workshop you need to try to answer some of the following questions about your participants and the workshop itself. You can use some of the techniques used on Modules 3 and 4 as well as simply asking people:

- What is the workshop about?
- Who has mandated/requested the workshop?
- Do the participants know each other? Are they a cohort or otherwise an intact group?
- What level does the content need to be aimed at?
- Why is there a workshop?
- Are the participants there voluntarily?
- Are there any animosities or rivalries in the group?
- What skills/knowledge do the participants already possess?

Depending on the specific circumstances there are certainly other questions you will have and answering these questions will lead to other questions.

As mentioned earlier facilitating is quite different from teaching. This is mostly because of the environment in which you will find yourself. Teaching is typically associated with younger learners whereas facilitation is mostly associated with adults. This is an important distinction as adults learn very differently from children due to their personal and professional experiences as well as their motivations for learning.

Figure 22 below outlines some of the distinctions between facilitated and traditional learning.

Facilitated learning	Traditional learning
learner-centered	instructor-directed
open, flexible, on-demand	rigidly scheduled
primarily project and problem-based	Facts-oriented
dynamic interaction between learner and facilitator and between learners	presentations that aim toward learner – content interaction
Constructivist in style – learners are required to develop their own ways of “knowing”	Behaviourist in style – learners learn what is “important” and internalize this accepted knowledge
interpretation, construction	transmission, acquisition
collaborative	individual

Figure 22



Reflection

The table below outlines some adult learning principles. Have a look at the principles in Column 1 and use Column 2 to write out how you will exemplify these principles.

Learning Principles	How will you exemplify these principles?
Curiosity – Adults need to know why they should learn something before beginning	
Self-awareness – Adults learn best when they are able to be more active in their learning both in choosing the content and engaging with it. They also learn better when they are able to rely less on the teacher.	

<p>Experience – Adults learn better when they are able to draw from within themselves for rich learning</p> <ul style="list-style-type: none"> ▪ Learners will need to question their own habits and assumptions 	
<p>Spirit of learning – In formal or semi-formal settings adults are ready to learn things they need especially if they can immediately apply them to real-life situations</p>	
<p>Motivation – adults are often (but not always) internally motivated to learn (more so than younger learners often looking for credentialing)</p> <ul style="list-style-type: none"> ▪ motivation can be destroyed by issues such as feelings of inadequacy as a learner (often from earlier negative experiences with education), a lack of opportunity or resources and time constraints. 	

Figure 23



Tip

The most important question to answer for all of your participants is *What's in it for me? (WII-FM)* If it isn't clear to everyone what they will get out of your workshop in the short, medium and long term then you have lost your audience and it will be nigh impossible to get them back. The take home message is for you to find out as early as possible what your learners want from the workshop and try to provide that. That lesson applies to you as a facilitator too. What do *you* want out of the workshop?

Feedback



Reflection

Think about times when you have given or received both positive and negative feedback. What made these positive or negative?

Constructive Feedback

Feedback is constructive when:

- we are open to receiving feedback and recognise the need for it
- it includes both positive and negative comments
- we understand the comments and the spirit in which they are given
- it is given at the right time and is given in the spirit of listening to and caring about the person

Receiving Feedback Proactively

A few strategies:

- listen carefully
- ask questions to clarify – ask for examples
- welcome the feedback – paraphrase the feedback to let the person know you have heard and understood
- accept valid points and the other person’s point of view (“I understand how you might have that impression”)
- take time to reflect on what you heard



Note it



A fast and easy way to get feedback is to ask participants to anonymously write on a piece of paper 2 things they like so far about your session, 2 things they don’t like and 2 things they have learned.

Tip

Giving Constructive Feedback

A few strategies:

- Feedback is helpful only when the person giving the feedback and the person receiving the feedback trust, accept and appreciate each other.
- Be specific. Describe what the person did or said. Refer to a precise situation or action. Give specific examples. Feedback should deal with the person's actions, not his or her motivations or character.
- Don't make the feedback appear judgmental; don't make value judgments about other people. Describe the behaviour but don't label the person. For example, State: "You missed the project meeting last week." rather than "You're ruining the project."
- Speak for yourself. Avoid saying "We don't like it when you ...". Let others speak for themselves.
- Don't exaggerate – be exact.
- Take ownership of your feedback. Use "I" not "you". Consider this example:
 1. You frequently miss project deadlines
 2. I feel angry when you miss deadlines.

Statement 1 is a "you" statement. People become defensive when hearing "you" statements and are less likely to be open to accepting your feedback. People are more likely to remain open to when an "I" statement is used (i.e. statement 2).

- Help people hear and accept positive feedback. Many people feel awkward when told good things about themselves and will fend off the compliment.



Follow the guidelines above for giving constructive feedback and write out what you will say and how you will say it. Remember that constructive feedback is a mix of positive (improving or strengthening) and negative comments.

Now role play the feedback session. Ask one person to give feedback, one to receive feedback, and the other to be observer.

After you have finished doing the role play, discuss these questions within your group.

Observer

- How did you observe feedback being given and received? What was effective? What could be improved next time? Share these thoughts with your group.

Giver

- What was difficult in organising and giving feedback? What worked well? What would you improve for next time?

Receiver

- What was difficult about receiving the feedback? Describe your response to the feedback. What worked well? What would like to improve for next time?

Creative teaching techniques

Active (Participatory) Learning

It is difficult to learn by sitting and listening to someone talk at you. Try to imagine learning math without trying problems or learning a language without speaking it.

Encourage learners to take be active (not passive).

If a learner experiences something they are more likely to internalise it than if you simply tell them.

You need a toolkit of teaching approaches to help you meet your goals. Use Figure 24 as your beginning toolkit so you don't spend 100% of your time at the front of the room lecturing.

Old standards	Interesting	Adventurous
practice exercises	job-aids	computer-based training
demonstration	discussion & buzz groups	debate
question and answer	brainstorming	discovery-based learning
lecture	case study	field trip
drill	checklists & questionnaires	game
reading	conference	panel
circuit	coaching (one-on-one)	peer-assisted learning
click-along	interview a subject matter expert	reflection
	role playing	simulation

Figure 24 – Toolkit

The following are explanations and tips about some of the less familiar techniques.

Old Standards

Question and Answer

- often called Socratic learning (after Socrates) tries to reveal content using questions and making connections between learners' insights and the key points of the lesson
- a variation on this approach is allow the learners to ask the questions which in turn directs the content

Drill

- repetition – useful for perfecting tasks that require speed or accuracy or require a specific procedure

Circuit (also known as station learning)

- several learning stations available each with different activities and outcomes for learners
- a good approach for groups characterized by diverse skill levels and interests (some stations could feature more/less advanced applications and exercises). NB: This is often used in early childhood learning to afford young learners the chance to explore different topics in a “safe” learning environment

Interesting

Case Study

- a detailed account of an event which should resemble a real-life scenario
- learners identify the issues and develop strategies for addressing those issues
- Often used in business and medicine

Large Group Discussion

- learners engage with the facilitator as well as other learners to elicit a variety of concepts

Buzz Groups

- quick focused discussions
- one technique is to have learners do a quick buzz group to discuss information that was just presented, identifying what was clear and what questions they have
- this is a good way to encourage individuals in large groups or online environments to ask questions. Ask the small groups to ask questions in the safe environment of their own group. If the group is unable to answer certain questions then learners know that these are “good” questions and can be forwarded to the facilitator.

Conference

- learners choose from a number of different presentations that may vary by content, media or location

Role Play

- learners act out a real world situation
- useful for examining realistic issues and to provide insights into the dynamics of a process in which people are involved

Checklists and Questionnaires

- can be used to guide a learner toward a recommended process or think through issues
- very effective when used in conjunction with a discovery learning approach

Job-Aids

- procedural guides, diagrams, glossaries, and online help features are examples
- a well-designed job aid is an effective way to help people learn new software procedures

Interview a Subject Matter Expert

- the facilitator or learners interview a subject matter expert to draw out pertinent information

Adventurous**Field Trip**

- on-site observation and discussion of what has been observed

Debate

- opposite sides of an issue are presented and discussed
- good for issues where there are differing views and approaches and where there is no “right” answer

Panel

- useful where there are a number of considerations or viewpoints to present

Simulation

- simulate the workplace and use of skills on the job

Peer-assisted Learning

- learners help each other learn, sometimes through collaborative group work and other times as they take responsibility for explaining concepts and procedures to others

Facilitating Active Learning

As a facilitator, do you have to always disseminate information to the learners? Or can learners figure out some of it for themselves? When learners are constructing their own knowledge in partnership with other learners you are building learning capacity.



Reflection

How do you facilitate active learning?

How to Facilitate an Activity for Active Learning

Provide clear directions:

- use verbs to describe what participants should do
- give directions in a logical sequence
- directions should be both verbal and written. Have the directions visible on an overhead or whiteboard during the activity
- be specific about how you want the activity to be organised – Is it an individual or group activity? What's the outcome and deliverable? How will participants report back?

Grouping strategies:

- discern a method ahead of time for getting people into groups
- use different groups from activity to activity. Use a combination of advanced learners with weak learners, advanced learners with advanced learners and weak learners with weak learners. Grouping advanced learners with weaker learners allows the weaker learners to benefit from advanced learners and allows less advanced learners to practice behaviours modelled by the more advanced learner. Allowing advanced learners to be grouped with other advanced learners relieves advanced learners from always assisting less advanced learners and gives them the opportunity to stretch their skills with others at a similar level.

Provide signposts:

- Tell learners how much time there is for the activity. Tell them when half the time has been used and tell them when there are only 1 or 2 minutes left.

Demonstrations

A demonstration is teaching by example rather than simply lecturing. A few tips:

- Indicate to learners what they are supposed to observe. Remind learners about what they should be sensing throughout the demonstration.
- Rehearse the demonstration alone or with a colleague before the learners arrive to ensure everything works properly.
- Make certain the demonstration can be seen and heard everywhere in the room. Use your colleague to help you test this during rehearsal. Is

it visible and easy to understand?

- Get the learners involved. Must each step be done by you?
- Do not rush the demonstration.
- Demonstrate one part at a time. Break complex parts into smaller parts.

Important Strategies for Facilitation

Weaving

How do you weave a discussion?

- use active listening
- synthesize individual contributions
- summarize the discussion at key times
- suggest new directions for “fresh thinking”
- suggest different approaches



Tip

A few guidelines when weaving a discussion:

- Participants should do 80% of the talking. Your job is to open and focus the conversation, encourage a variety of views and then weave it all together. Try to include everyone in the discussion.
- Ask an open-ended question to open up the discussion (i.e. a question that has no clear right or wrong answer or maybe a question that is a bit controversial)

Brainstorming

Brainstorming is a long-standing method for generating a lot of ideas from within a group in a relatively short period of time. The philosophy is that there are many correct answers to a given challenge depending on your point of view and what you are hoping to achieve. However, if you believe there is only one right answer then you will stop looking as soon as you find it. The best way to get a good idea is to get a lot of ideas.

In practice brainstorming has not been proven to be any more effective at generating ideas and solutions to problems than working individually. The real value in brainstorming is in its ability to improve group dynamics and camaraderie.

Here are a few rules to consider when brainstorming:

- Defer judgment – keep your mind open to all possibilities. Judging ideas gets in the way of generating new ones.
- Quantity over quality – generate as many ideas as possible. Move past the obvious ideas that come right away. The greater the number of ideas, the greater the likelihood of producing some which are new and useful
- Encourage everyone to participate
- Think freely – blurt out any idea, even if it seems silly or crazy. Sometimes these are useful building blocks.
- Connect the dots – look for chances to connect a new idea with others that you hear.

Make it Real!

Make the content alive so that you can make connections with the learners – and not be boring!! Remember a facilitator does more than disseminate information. Try adding these to your materials:

- statistics that illustrate your ideas (check out <http://www.statscan.ca>)
- quotes
- metaphors and analogies
- personal stories with a message, personal insights or observations
- humour (if appropriate)
- inclusive language, such as we, us, and our

Storytelling

Research suggests that information conveyed through story is more easily integrated, because stories tend to be:

- compelling
- more memorable than a list of facts
- fun for the facilitator and learners
- personal
- community builders

When telling stories be sensitive to:

- language
- cultural issues
- humour
- finding a balance between sanitizing, exaggerating, and fabricating

Be sure to practice!

Metaphors

A metaphors is language that directly compares two seemingly unrelated concepts. We are probably all familiar with literary metaphors like: *All the world is a stage* or *raining cats and dogs*. Metaphors and analogies are bridges, linking the complex and unfamiliar to the familiar. They also tend to be visually descriptive, which enhances learning.



Reflection

What metaphors are used in the word processing program you use?

Say that again!

It's not just what you say, it's how you say it: 55% of your message is communicated non-verbally through body language and 35% by your voice qualities. Less than 10% comes from the actual words.

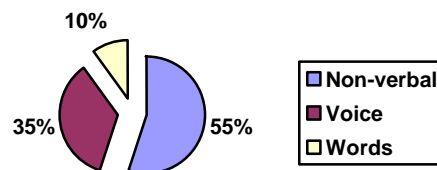


Figure 25

Your Voice

When speaking we are more aware of the words than we are of the properties of our voice. You know this to be true if you have ever heard your voice recorded and you wonder: “Who is that speaking?” As a listener, however, we are very attuned to voice characteristics.

You can do a lot with your voice including varying the speed and volume. Here are some possibilities:

Pace

- Slowing down implies the need to concentrate and reflect.
- Speeding up signals the need to stay alert for the next idea.

Volume

- Turn it up or down to emphasize a point, capture attention, or indicate a new idea.

Pauses

- Use pauses strategically. Pause after making an important point. Let the full weight of what you have just said sink in and then move on.

Inflection

- Like volume a rise in your voice pitch can create anticipation and suspense, whereas a fall in pitch gives weight and finality to what you have said.
- Some caution needs to be expressed here as inflection is also used to ask a question. Your voice naturally rises in pitch when asking questions. Don't make every statement out of your mouth sound like a question.

Tone

- Vary the tone of your voice as using a monotone will put your audience to sleep.

Six ways to improve your delivery

Body Language

Posture

Stand up straight but don't be stiff. Do not sit when you present or during discussions (if you are facilitating). Balance your weight evenly on your feet. Shifting your weight back and forth can be distracting to your audience. Sitting can be a useful strategy when you want to group to feel that you are one of them and you are listening; like when someone else is making a presentation for example.

Movement

Move around but don't pace. Use the movement of your body to stay close and involved with your learners.

Positioning

Face the whole audience if possible. This will help keep your eye contact on them, where it should be. Do not speak unless you have eye contact with the audience and never speak to the whiteboard.

The following will distract from your presentation:

- keeping your hands in your pockets or behind your back
- keeping your arms crossed
- wringing your hands nervously
- playing with jewellery or spectacles

Non-verbal behaviour, the way we communicate with our bodies, is an important element. Smiling at participants as they give answers encourages them. Giving them positive, non-verbal signals when they answer a question encourages them to participate.

Eye Contact

In most cultures and scenarios eye contact involves the audience and makes your delivery more personable. Good eye contact between the facilitator and learners also helps relax you by connecting you to the audience and reduce feelings of isolation. There are certain situations (usually in unequal power relationships) where eye contact is not recommended for cultural reasons. This goes back to knowing your audience.

Try to maintain eye contact for 1 – 3 seconds per person without letting your eyes dart around the room. Don't just look at your audience – *see them*.

Try to focus on one person, not long enough to make that individual feel uncomfortable, but long enough to pull him or her into your presentation. Then move on to another person.

Physical Space

Physical space is an often overlooked variable in conducting successful workshops. Try to pay special attention to the room where you will be facilitating. If possible, get access to the room at least 24 hours in advance of the workshop so you can examine the set up of the room. Note the following:

- Is the room large enough? Too large?
- Can the chairs be moved for group work?
- How are the seats arranged?
- Is there a window? Can it be opened? Are there blinds on the window? Will light from the window interfere with:
 - the learners?
 - the screen?
 - the whiteboard?
- Are there tables in the room/
- Are there any blind spots in the room? Deaf spots?
- Is the lighting adequate?
- Are there materials in the room like chalk, markers, dusters, flipcharts etc...

Room Set- Up

The set-up of the room influences:

- the ability of people to see and hear
- the level of formality
- the level of participation
- your relationship with the learners.

Here are some ideas of how you can alter a room to influence the learning climate. What other ideas do you have?

- arrange the tables and chairs in different shapes (circles or U-shapes tend to encourage discussion whereas rows tend to encourage lecture)
- put up posters
- show a “welcome” overhead or flipchart
- ask participants to sit in different places each time they come to a session. In this way they will meet and work with other people
- have place cards available so people can write down their names
- try to avoid having any empty chairs

Presenter and Participant Space

Try to ensure that you have at presenter space of about 4 metres in diameter. More than that and it can give the impression of aloofness or formality. Less than 4 metres and you won't have the space in which to move around and both you and your audience are likely to be uncomfortable.

There should be some overlap between presenter and learner space as shown in the diagram below. Presenter space is the circular space you use as a presenter (to show overheads or slides, use the flipchart, keep your notes). Moving suddenly into participant space will immediately get everyone's attention and can be used to great effect. Like all “tricks” use it sparingly so people do not become bored.

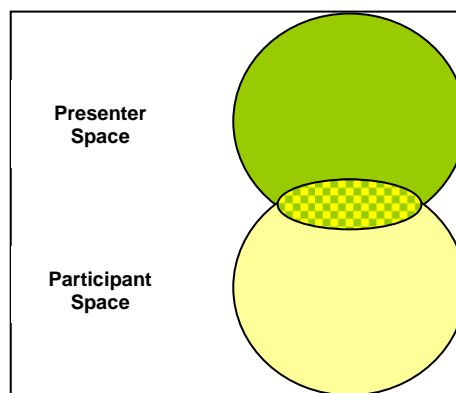


Figure 26

Standing behind a table or lectern presents the most formal image. Standing out in front is the most inviting, personal and interactive. Standing beside the O/H projector or laptop (if you are doing a PowerPoint presentation) allows you to be closer to your participants and at the same time have your notes easily accessible.

Speak! Don't Read!

Make sure you know your material well-enough that you can maintain eye contact with your audience and only occasionally refer to notes or slides. It isn't necessary for you to memorize your speech. As noted earlier, the precise words you use are less important than the way you present them.



Tip

DO NOT read your notes or slides. People can read for themselves.

You may want to prepare some tools to help you make your way through the content without reading it. This is especially true if you are nervous, unfamiliar with the content or are new to presenting. Don't feel badly if you need these tools to cue you to the content. Even the most experienced professionals use some form of cues while they are presenting (even if you don't see the cues). Here are some ideas:

Cue Cards

- include key words, phrases, or pictures to remind you the topics you want to cover, their order or essential words, data, or key questions you want to ask

Post-It Notes

- Put post-it notes in your regular notes as reminders of what to cover. Remember where the notes are while you are presenting or carry them with you as you move about the room.

Overheads or Slides

- Overheads and slides are meant to be for the benefit of the learners. However, slides with bullet points can also serve as wonderful reminders for the presenter (an example of a cue that the presenter uses without the learners knowing).

Checking for Understanding and Debriefing

Checking for understanding is critical to learning:

- facilitators can see what participants are learning (or not) and make adjustments
- participants get feedback so they can adjust their own learning strategies

A good facilitator must be able to “read” a situation and gauge the learner’s response – and then modify and accommodate instructional methods and content based on that feedback.

Remember that just because we are teaching does not mean that learners are learning. Without feedback how do we know what learners are learning?

When you are using active learning activities or trying out new ideas it is important that you debrief after these sessions. It’s not enough just to try something – the real learning occurs when we think about what we’ve done and what strategies we will use next time.

Feedback in this case allows the facilitator to:

- correct misunderstandings
- build on discoveries
- fill in any gaps
- ensure learners make connections between the activity and key learning points
- ask learners to document what they learned.



Note it

Facilitators often tend to rehash what happened in an activity and leave it at that. Be prepared to weave new ideas into the critical discussions that follow a learning experience.



Note it

A quick way to debrief is to ask the three “whats”.

1. What? – What did I learn?
2. So what? – What does it mean?
3. Now what? – How can I apply this? How can I use this information to move on?



Group Activity

Consider the following questions and provide responses.

1. If learners don't ask any questions I must have done a good teaching job.
2. I have to answer all questions.
3. I should know the answers to all questions in the topic area.
4. I should never direct a question to an individual.

Asking Questions

Asking questions is one of the most powerful methods for learning. At the least it engages learners so they are awake. At best, asking questions forces learners to challenge their understandings of the materials and make new connections with old content.

Here are two strategies for using questions in your workshops:

1. **For recall**
 - a. the 5W's (Who, What, When, Where, Why) and 1H (How) work well to help learners recall facts
2. **For critical thinking**
 - a. questions that challenge assumptions and previous understandings as well as encourage discovery, insight, or action
 - b. questions that ask learners to make connections between their own experiences and the content. Usually these questions will require learners to provide evidence or examples.
 - c. hypothetical questions that promote speculation (i.e. "What if ...")
 - d. open-ended questions that create new questions

Craft Your Questions

- Write your questions out before hand; perhaps include them on the post-it notes you use as guides.
- Think of the answers for your questions and try to anticipate possible responses so you won't be thrown off guard.
- Ask a mixture of open and closed questions. Open questions, such as "Tell me about your experience with computers" tend to open up the discussion. Closed questions, such as "How many of you have a personal e-mail account?" tend to limit discussion. You will need both, although closed questions should be used sparingly. Open questions get discussions going. Closed questions obtain pertinent information about specific topics.
- Prepare to reword your questions if you are not getting the responses you are looking for.



Tip

Good questions are concise, simply worded, unambiguous, thought provoking, and purposeful.

Direct Questions

Aiming questions directly at individuals is an accepted practice even in adult learning circles, however, care must be taken to not overuse this technique nor to make people feel overly uncomfortable. Above all else, as a facilitator, you want to make the learning experience positive and safe.

You can direct questions to the group or to an individual.



Activity

Consider the following questions.

1. Directing questions to an individual is especially useful when one or two people are dominating and you would like to _____.
2. Questions can be directed at learners who are distracted or bored to _____.
3. Always give the person the option _____.

Encourage Questions

You want your learners to ask questions.

Your body language and what you say goes a long way in encouraging learners to ask questions.

- Always say, “What questions do you have?” rather than “Are there any questions?”
- Step toward the learners, raise a hand and ask “What questions do you have?” Pause so they have time to formulate their questions (count to 10).
- “Comments, questions, insights” gently lays the path for interaction and let them know you are not just interested in hearing their questions but that you are also encouraging dialogue.
- Ask in such a way that you assume and anticipate there will be questions.
 - “I’m looking forward to hearing your questions”.
 - “Let’s start with this side of the room.”
 - Make eye contact. Move into the front half of presenter space.
 - Ask the first question yourself: “People often ask me if I would do”

- Put people into groups and give them 2-3 minutes to mull over the content and come up with questions. This encourages learner-learner interaction and in the process they may answer some of their questions themselves. Any questions they cannot answer within their groups are obviously “good” questions to be taken up either by the facilitator or the class as a whole.



Note it

If you’re not getting many questions you may need to do a “temperature check” to find out what is happening!

Handling Questions

You don’t have to answer every question that you’re asked. It is often good not to answer a question but reflect the question back to the asker or to the larger group. This helps maintain a learner-centred focus. Sometimes not answering a question may allow you to keep the discussion on track. You may want to try some of these tricks:

Defer – Postpone answering the question

- when you don’t know the answer
- when you will be covering the information later on in the course
- when the question is off-topic

Place questions in a “staging area” for answering later when you will be covering that subject or if you do not know the answer and need to consult your materials to develop an answer.

NB: If you do answer a question about a topic to be covered later, you will probably confuse the other participants as well as make them feel badly that one of their colleagues is “advanced”. Depending on the circumstances the person asking the question will probably not absorb the answer in any case.

Relay – Refer the question back to the group

- when there is an expert on the topic in the room
- when you want to initiate discussion
- when you want to avoid giving your opinion

Relay questions to other participants to see if others are having problems with the same concept.

Reverse – Refer the question back to the person who asked it

- when you want to avoid giving your opinion
- when you think the asker already knows the answer
- when you want to encourage the learners to make the connections themselves

Reflect questions back to participants to empower them. Participants often ask questions when they have an idea of an answer. Properly done in a nurturing way, reflecting a question back to the person who posed it can help build that person's self-confidence and self-esteem.

Answering questions

Answer questions yourself when you feel a need to establish that you know your subject well or for other reasons such as saving time. Keep in mind that there is more learning going on when the learners, not you, are answering the participants' questions.

If you do answer the question yourself, here are some tips:

- prepare for questions and practice answering them
- listen to their question and don't interrupt until they have finished asking their question
- restate and paraphrase the question so everyone understands.
- look directly at the person who is asking the question
- be aware of your own body language – stand firmly, give reassuring nods, smiles, and “uh-hums”
- involve the whole group in your response – employ the 25% - 75% rule. Direct approximately 25% of your eye contact to the person who asked the question and 75% to the rest of the group.
- keep answers to the point – a paragraph not a chapter!

Active listening

The most important thing in communication is hearing what isn't said. (Drucker).

Active Listening

Active listening is an intent to listen for meaning. The goal of active listening is to improve mutual understanding by checking that the message has been received correctly.

So often we pretend to listen to what someone is saying. It is usually obvious when someone is not paying attention. As an active listener you:

- are attentive – alert and interested
- encourage and accept the speaker's words, thoughts and ideas
- create relationships – acknowledge the speaker's feelings first to show you care. Acknowledge the message last to reveal your understanding of the ideas.
- summarize, paraphrase, and mirror back to ensure understanding
- ask questions
- are open to new ways of knowing
- are not judgmental



A few phrases you may find helpful to demonstrate you are listening actively include:

- What I'm hearing is ...
- Your message seems to be, "I ..."

Filters

Whether we realise it or not we tend to "hear" people through our own filters whereas we should endeavour to "listen" to people filter-free. This is very difficult as our filters are so much a part of what we are as human beings. Our filters are created through things like experiences, beliefs, assumptions and values. Knowing that we have these filters, and from where they derive, helps us to remove them whilst communicating.

When someone says something do not immediately become defensive, jump to conclusions, or push your opinions on others. Instead, listen filter-free and wait to see what will emerge as the other person talks further.

Questioning

One of the more powerful techniques you can use as a facilitator to improve discussions and, therefore learning, is to ask questions. The following are types of questions that you can use to enhance learning and how you can use them. Use:

- questions that demonstrate active listening and an understanding of the speaker's message
- questions that challenge assumptions
- open-ended questions that create new questions
- questions that ask for options, alternatives, solutions.

Try to use questions that encourage critical thinking like:

- Why do you think this is a challenge/ great idea?
- How does this affect you?
- How might others see this challenge?
- Could you help me understand why you believe what you just stated?

Purposeful Dialogue

Purposeful dialogue is built on active listening and intelligent questioning. You are likely engaged in purposeful dialogue if you:

Acknowledge	Recognize the value received from the expertise of others.
Assess	Is the group is getting what they want from this discussion? If not, what can we do differently in the remaining time?
Break tension	Humour is often a good tension reliever.
Build and expand possibilities	Extend or develop an idea to explore its potential.
Check the temperature of the room	Summarize the group's position and check whether the team agrees with the summary.
Encourage	Support or recognize the contributions of others.
Encourage participation	Ask less active members for their opinions or make a general request for input.
Harmonise	Use conflict resolution skills to mediating differences between team members.
Play Devil's advocate	Disagree or provide a contrary view on an issue.
Provide extra information or opinions	This includes facts, data, experiences, values or beliefs.
Suggest	Begin a new idea to encourage group participation. For example, "Let's begin by ..."
Summarize	Condense and reiterate what's been said.

Figure 27

Leadership



Group Activity

Get into small groups and discuss the following questions:

1. What do leaders and coaches do?
2. What makes a successful leader/coach?
3. What challenges might you experience in this role?

Leadership and Coaching is the ability to help others discover their needs, set goals, and work effectively to attain their goals in a structured (but highly flexible) manner.

As an effective leader you will:

- Build relationships
 - create a supportive environment that produces ongoing mutual respect and trust
- Communicate effectively
 - actively listen and ask probing questions
 - adapt the content and style of communication to the audience
- Plan and set goals
 - help participants identify and access learning resources
 - demonstrate a learning spirit by seizing opportunities
 - support innovative approaches
- Manage progress, accountability, and empowerment
 - inspire others through professional work habits and personal behaviour



- be decisive and show commitment
- work with the project team to assess progress, evaluate outcomes, and celebrate successes
- accept responsibility for deliverables

A person cannot become a leader solely by studying the attributes of leadership. A person has to try out their leadership skills, make mistakes, and take time to reflect on and learn from them (Kagaan, 1999).



Reflection

A story

While two people were facilitating a course on ICTs at a local college, they noticed that there was a lack of reading material about ICTs, especially knowledge management. Learners would ask for references for further reading or exploration on Knowledge Management topics but the facilitators could not find any resources available in the college or in the nearby libraries and stores. So the facilitators decided to take the initiative to collect some resources for their learners. They printed brochures announcing their project and distributed these brochures at their universities to students and faculty members asking for donations of used books related to knowledge management. The facilitators wanted to build a reference library at the college which learners and other community members could access. They got a positive and enthusiastic response from people at the university and the facilitators were able to collect a good number of books and publications. They sorted the books and organized them and placed them for public access at the college. These facilitators demonstrated leadership by taking initiative to bring about change to their learners and community.



Activity

It probably is not possible to learn how to be a great leader. Great leadership is the result of experience, demeanour, training and, frankly, luck. However, we can learn to be better leaders. We can learn to be prepared for leadership so we are ready when called. A powerful way to learn about leadership is to study good leaders. Think of someone you regard as a leader; a person who has had a positive influence on your life and inspired you. This person could be a political leader, sports figure, artist, or someone from your family or community; someone who is living or someone from the past.

Write a story about that person and their qualities, traits and behaviours that you feel make them a leader.

- What was their style and how was it effective?
- How did they handle different types of situations?
- How did their actions and attitude make you feel?

Tips for Developing Leadership Attributes

- Look inside yourself – use what you know about yourself and how you’ve demonstrated leadership in the past.
- Learn from other leaders – find a mentor. If there is a leader who you admire, and that person is accessible, talk with her/him about leadership issues.
- Ask peers how they perceive you as a leader. Ask for suggestions for improvement.
- Read about leadership – there are many resources on both the theory and practice of leadership. Participate in leadership-building workshops.
- Believe in yourself – if you believe in what you are doing others will believe in you too.
- Believe in others – encourage, build confidence, recognize achievement. Create opportunities for others. Energize others.
- Challenge yourself.
- Embrace change – both change in you and around you. No matter how well you are doing, it’s not perfect – it never is and it never will be. Be prepared to make corrections.

Team work

It may have already occurred to you that facilitation is more about team work than anything else. As a facilitator your job is to assemble people with disparate values, backgrounds and skills and help them to achieve certain goals. In this context these goals are learning goals but they could as easily be business or other types of goals.

Ingredients of Successful Teamwork

How effective a team becomes depends on six essential ingredients:

1. Clarity in team goals – Ideally the team sees the mission (project) as workable and has a clear vision and can progress steadily towards its goals.

Indicators of potential trouble for the team include:

- frequent switches in direction
- frequent arguments about what the team should do next
- feelings that the project is too big or inappropriate
- frustration at lack of progress
- floundering

2. A plan – Ideally the team has created a (project) plan which documents the steps and consults the plan when deciding what to do next.

Indicators of potential trouble include:

- “being lost in the woods” (when one step is completed there is little or no idea of what to do next)
- “fishing expeditions” (the team plunges ahead hoping to stumble across ideas)

3. Clear communication – Ideally team members listen actively and share information

Indicators of potential trouble include:

- members are unable to say what they really feel
- bullying statements (“What you don’t understand is ...”)
- discounts (“That’s not important. What’s worse is ...”)

4. Beneficial team behaviours – Ideally team members

- initiate discussions
- test for consensus
- try to ease tension in the group
- suggest procedures for reaching a goal
- give and receive feedback

Indicators of potential trouble include:

- reliance on one person (the leader) to manage the discussion; no shared responsibility
- discussions that are stuck

5. Balanced participation – Ideally the team has reasonably balanced participation

Indicators of potential trouble include:

- some team members have too much influence, others, too little
- some members speak only about a certain topic

6. Established ground rules – Ideally the team has open discussions regarding ground rules where the group discusses what behaviours are acceptable and unacceptable

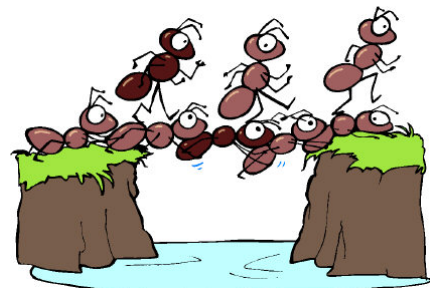
Indicators of potential trouble include:

- certain important topics are avoided; conversations recur that are irrelevant to the task
- recurring differences about what is or is not acceptable behaviour

Stages of Team Growth

All teams will go through ups and downs. One team may feel very different from another due in part to where they are at in their team development.

As a facilitator it is important you know about the stages of team growth so that you recognize what's going on and can make appropriate



changes. Understanding these stages will keep you from overreacting to normal problems and setting unrealistic expectations.

There are many different theories about how teams develop. One of the most widely known is Tuckman's (1973) sequential stage theory. Tuckman says that over time groups go through five fairly predictable stages:

Stage 1: Forming

- Like a newly formed football team (a metaphor?) players standing by the side of the field kicking at the grass and chatting casually.
- It is a very polite stage because people are getting to know each other. At the same time, people are wondering "Should I be here?"
- Because there is so much going on to distract members' attention, the team accomplishes little.

This is what you'll see:

- Participants shift from individual to member status.
- The members identify the appropriate behaviours of the group.
- Emotions include: anticipation, optimism, tentative attachment to the team, doubt, fear, and stress.
- Behaviour: attempts to identify the tasks and responsibilities of the group as well as determine acceptable group behaviour.

Stage 2: Storming

- Now they are like athletes preparing to build the team; practicing standard manoeuvres and testing their mettle.
- Conflicts erupt and managing conflict becomes the group's top priority. The team can feel stuck and some members may opt out.
- Two common areas of conflict are over leadership of the group and differences in the needs and goals of individuals.
- Impatient about lack of progress, members argue about what actions the team should take. They have little energy to spend on progressing toward the team's goal. But they are beginning to understand one another.

This is what you'll see:

- Members feel the task is different and more difficult.
- Decision making process is not yet identified.
- Members become more defensive.

- Members resist co-operation and have doubts of succeeding.
- Emotions: resistance and sharp fluctuations in attitude.
- Behaviour: arguing, defensiveness, competition, and disunity.

Stage 3: Norming

- As athletes get used to working/learning together, they start running and planning plays together. They start helping each other improve rather than competing with one another.
- The team determines new ways of working together and establishes norms for appropriate behaviour. The group develops a sense of “us” or “we”. Because its members are more willing to accept responsibility, the group depends less on one leader. The skill required most at this stage is negotiation.
- They now have more time and energy to spend on the project/team. Finally they start to make significant progress. There is a sense of getting organized – establishing procedures, giving feedback and confronting issues.

This is what you’ll see:

- Members accept their roles and responsibilities.
- Stress is decreased.
- Members feel more at ease that different issues will resolve and unfold naturally.
- Constructive criticism is expressed.
- Emotions: acceptance of membership and relief.
- Behaviour: an attempt to achieve harmony by avoiding conflict, more friendliness, a sense of team cohesion, and establishing and maintaining team ground rules and boundaries.

Stage 4: Performing

- Now they are a well honed football team as they become a more effective unit with everyone working together.
- The group works together to accomplish its goals. There is productivity and interdependence among group members as they openly share information, knowledge, and skills. When conflicts arise, they work through them constructively.
- Members have discovered and accepted each other’s strengths and weaknesses, and learned what their roles are.
- This is a close and supportive team that is resourceful, flexible, open, and effective.

This is what you’ll see:

- Problem solving begins.
- Changes are implemented.
- Members accept feedback on strengths and weaknesses.
- There is satisfaction in the progress of the team.
- Development of connections between team members.
- Team becomes active.
- Emotions: insight into personal and group processes and satisfaction.
- Behaviours: constructive self-change, ability to work through group problems, and close attachment to the team.

Stage 5: Adjourning

- Having won the big game participants are now at the post-game party congratulating each other and complimenting the brilliant plays each of them made.
- The life of any group is finite. Sometimes this stage is called re-forming and takes the team back to Stage 1. For example, if the composition of the team changes.

This is what you'll see:

- an emotional bond between group members
- celebrations
- may be difficult to say good bye to each other.



Reflection

Teamwork Self-Assessment

Look at the following list. How many of the following skills do you use in your own work?

- Define roles, tasks and responsibilities.
- Assume leadership roles.
- Take advantage of skills and knowledge of colleagues.
- Recognise the achievements of individuals and the team.
- Embrace change and innovation in creative problem solving.
- Facilitate intra-team communication.
- Focus on the aims of the team.
- Acknowledge other points of view even when they differ from your own.
- Embrace constructive criticism and positive feedback.
- Exude confidence within the team.
- Model respect among team members, as well as being realistic in expectations of other team members.

Conflict resolution

Resolving conflict is an important skill for a facilitator because you will certainly encounter conflict. You may be involved personally in a conflict or see it occurring within a team or workshop. As we saw when we explored in the Teamwork section, being able to resolve conflict is what helps teams move from Storming to Norming to Performing.



Fortunately, there is a well-developed process available for resolving conflict:

Stage One: Introduction

- Learn what are the needs of the persons in conflict

Stage Two: Issue Identification

- Identify the issues and the reasons why the persons feel their needs are not being met

Stage Three: Discussion – Problem Solving

- Develop problem solving strategies to resolve the issues

Stage Four: Agreement

- Agree on the resolution. NB: A solution to which not everyone agrees is not a viable solution.

**Group Activity****Smith Inc. Role Play**

In this next activity you will get a chance to practice the four stages of conflict resolution. As you work through the scenario always keep problem solving until you find a solution that is fair to everyone.

Overview of the three main characters:

- Mr. Smith is the owner of a small business, Smith Inc. He received a special government grant to hire Peter. As the business owner he has the power to fire Peter or give him a poor reference. However, if he does this he may not receive a grant to hire another student next year.
- Emilyn is Mr. Smith's cousin. She has worked alongside Mr. Smith since he began his business. He attributes its success to her and relies on her extensively. She enjoys knowing she is very valuable to him and her job is secure. She doesn't need to learn new skills to keep her position.
- Peter has just graduated from university. This is his first job. He has the skills and knowledge Mr. Smith and Emilyn need. He sees the job as an opportunity to make money and show what he can do.

Divide the learners into 5 teams. Advise them that they will have 1 minute to review the cards (to be found in the "toolkit" document) and then they will perform the role play within their group.

Within each group, direct the learners to divide the cards among themselves but not read any card other than the one they were given. One person will not assume a character but instead observe and record the conflict resolutions and problem solving behaviours they see. The

observer will be given an “Observer Card” for each stage and must NOT share this information with the others in the group.

Assume your respective role and begin dialogue following the instructions in your card. Allow 3 minutes for Stage 1 role plays. Do a process check. If you have achieved the Stage 1 goal, then hand out the Stage 2 cards and continue. Keep the same roles and review the Stage 2 cards. Once again allow 1 minute for preparation and then begin to act out the role play. If a group does not achieve the Stage 1 goal they must keep working at Stage 1 until they do; hand out the Stage 2 cards once they reach the goal. Continue in the same fashion for Stage 3 and Stage 4.

You will know when each stage has been completed successfully when:

Stage 1: The goal is met when Mr. Smith and Emilyn recognise they need help and that Peter has the skills to help them. Move to Stage 2.

Stage 2: The goal is met when the group realises Mr. Smith doesn't want to upset Emilyn nor does Emilyn doesn't want to look stupid and Peter wants to make a difference without losing his job. Move to Stage 3.

Stage 3: The goal is met when Mr. Smith and Emilyn accept Peter's help. Move to Stage 4.

Debrief (for the facilitator – to be placed in the toolkit document or facilitator's notes... Probably best that learners not see this until the activity is completed)

What?

- What happened? How was the goal at each stage reached?
- Everyone had different goals. What conflict resolution strategies did they use to resolve any conflict?
- In this case both the product and the process are important – what was the outcome how did the participants reach it? The observers should have valuable information about what they observed. The participants will offer the perspectives of why they acted in the way they did.

So What?

- What was challenging / simple about resolving each stage of the conflict?
- What strategies did each group use?
- How did Peter balance Mr Smith's objectives against Emilyn's?
- How did Peter introduce technology AND ensure everyone felt good about the outcome?

Summarise

Everyone won! Peter had the opportunity to show his skills and got paid. Mr Smith and Emilyn got a better filing system and now have more free time. Each values and respects the other.

Now What?

What might you do differently next time you encounter conflict?

Conflict Resolution Skills

Conflict resolution strategies are based on 11 skills. Which skill – or skills – are most appropriate to your particular situation?

1. The win/win approach
 - There are no winners and losers; participants must all have their needs met
2. Creative response
 - Turn a challenge into an opportunity
3. Empathy
 - Use your communication skills to demonstrate that you value participants and their needs
4. Assertiveness
 - Use strategies to resolve the problem; not attack the person
5. Cooperative power
 - Conflict is often about power. Use power to mutually benefit everyone rather than holding power over someone
6. Manage emotions
 - express emotion wisely and sparingly to create change
7. Willing to resolve

- Conflict can only be resolved if all parties actually want it to be resolved
- 8. Map the conflict
 - Describe the issues and reach consensus on the issues; if not their resolution
- 9. Develop options
 - Use the conflict map above to develop a map of solutions
- 10. Introduce negotiation
 - Begin with common ground; no matter how trivial, and move from there
- 11. Broaden perspectives
 - Try to get participants to see the bigger picture in which their conflict is contained



Note it

Here are some key points to remember:

- Teams are made up of people and people *will* experience conflict.
- Don't ignore and suppress conflict. Conflict can enhance learning and jump start problem solving.
- Some of the classic warning signs of conflict brewing:
 - someone is unusually silent
 - the same people repeat their points
 - participants attack each other personally or each others' ideas (criticism)
 - participants do not listen to each other
 - one person forces their ideas and opinions by speaking/lecturing at other participants.
 - aggressive body language or words
 - there are "islands" within the group and no team spirit.

Valuing people



Activity

List the ten characteristics that you feel define who you are. Try to distinguish between *who* you are and *what* you are.

Dimensions of Diversity

Diversity is a complex concept that describes the unique characteristics that we all possess. The characteristics distinguish us as individuals and also identify the groups to which we belong. Diversity includes notions of class, disability, ability, ethnicity, family, gender, language, religion, and age.

Sometimes these characteristics are visible, but, usually they are not visible and can only be discerned through communicating with the person or group. Hence, we must be careful about making decisions based on assumptions about visible cues. These cues may be inaccurate and can easily lead to misunderstandings. To really know someone we need to communicate with them.

Really communicate with people. Respect them. Show that you respect who they are. Clear your mind of assumptions or stereotypes. Stereotyping is one type of discrimination that we can all fight against. Don't accept popular notions of what people are or are not. Take them time to learn about people for yourself and keep your mind open to new possibilities.

Diversity is a wonderful thing. How boring it would be if we were all the same. Having said that we do have lots of things in common. We are all human beings. We eat, drink, breathe, think, and feel both happiness and sadness.

As a facilitator, you need to:

- communicate skilfully and respectfully as well as be flexible
- acknowledge diversity
- develop skills for working with diverse groups
- become more self-aware of biases.



Reflection

A Story ... The learners in Paul's session were brainstorming possible technology applications for their business. Paul found it hard to get the discussion started. Therefore he invited learners to share their ideas one by one. Two learners were much older than the rest of the group. Paul did not invite them to take part in the discussion as he assumed they were from a different generation and probably would not be interested or know what to say. As the discussion progressed one of these two learners (John) offered his opinion about a technology solution brought up by another learner. John suggested a different technology application that would be better suited for that learners' situation. The group of learners was impressed with the idea and was really interested to hear more of John's ideas. Paul realized he should not have jumped to conclusions and that it was important to create the space for everyone to participate and share their experiences.

Dos and Don'ts when facilitating

Now that we have nearly reached the end of the content on facilitation here are some tips and advice you may find useful before even starting a workshop.

Do:

- Provide an agenda for each section of the workshop that includes:
 - The title of the workshop (to make sure people are in the right room)
 - The purpose of the workshop
 - The desired outcomes/objectives
 - Background information
 - Information about yourself if the group does not know you
- Ensure each person is heard
- Find common ground and reflect back to the group, as often as necessary
- Personally welcome new people
- Help set up/clean up the meeting room
- Encourage everyone (especially new people) to speak up and participate
- Recommend ways to resolve differences
- Ensure that decisions, the names of people responsible for their implementation, and deadlines are openly acknowledged and written down
- Be positive and upbeat throughout the meeting - and end on a positive note!
- Establish the ground rules for the workshop at the beginning – no cell phones, when the breaks will be etc.. In formal settings over longer periods of time you may need to make this a learning contract.
- Tell participants where the washrooms are



Don't (or allow others to):

- Dominate the discussion
- Make decisions for the group. Instead, once a decision is made, check verbally that everyone agrees before proceeding.
- Bring up issues not relevant to the current issue being discussed
- Dwell on past problems
- Insist that people support your idea
- Use acronyms, or heavily technical or legalistic language
- Assume that everyone is familiar with certain historical events or background information
- Be dismissive of questions, no matter how basic

Thank you to Amnesty Canada for this list Dos and Don'ts.
http://www.amnesty.ca/youth/youth_action_toolkit/how_to_facilitate_meeting.php

Facilitation Checklist

Here is a final checklist you might find useful which will carry you from the first moments you think you might want/need to facilitate a workshop through to the end of the session.

Task	Notes	Completed <input checked="" type="checkbox"/>
Choose a facilitator	Should your facilitator be internal or external to your organisation? Internal facilitators are ok if: <ul style="list-style-type: none"> • The topic is not too complex • The topic is not too controversial 	<input type="checkbox"/>

Task	Notes	Completed <input checked="" type="checkbox"/>
	<ul style="list-style-type: none"> • The person has experience as a facilitator <p>Otherwise you should use an external facilitator</p>	
Identify the goals of the workshop	<p>What are your outcomes?</p> <ul style="list-style-type: none"> • Need to have outcomes • Nice to have outcomes 	<input type="checkbox"/>
Invite participants	<p>Invite people who can benefit from the workshop and can contribute to the overall progress of the group.</p>	<input type="checkbox"/>
Choose a location	<p>Try to choose your building and room carefully.</p> <ul style="list-style-type: none"> • Is there enough space? • Is there after hours access • Can the room(s) be reconfigured • Is the lighting appropriate? • Would it be helpful to use facilities outside the normal working spaces like a hotel? 	<input type="checkbox"/>
Arrange for equipment	<p>This doesn't just include the obvious audio-visual equipment but also small things like:</p> <ul style="list-style-type: none"> • Lots of paper • Markers • Scissors • Flip charts • Tape 	<input type="checkbox"/>

Task	Notes	Completed <input checked="" type="checkbox"/>
Establish ground rules	This may require a learning contract as outlined earlier in this workbook but would minimally include rules of engagement like “critique ideas not people”. You may also want to set limits on how long individuals can talk. You may also want to set rules about how people can interrupt politely. This can be done in creative ways using a “talking stick” (i.e. People can only talk while they are holding the stick)	<input type="checkbox"/>
Send out pre-workshop materials	Establish what participants will need to know and bring before the workshop. What are the pre-requisites? Are there any materials you would like learners to have read or browsed before arriving?	<input type="checkbox"/>
Begin the workshop with an icebreaker	Ice breakers are important especially when participants don’t know each other very well. Have learners introduce themselves and each other in creative ways. If people know each other well have them tell the group something about themselves that no one else would know. Starting the session with a joke can work too. A good safe joke to begin with is to ask people to think of something funny...and then laugh!	<input type="checkbox"/>
Have fun and don’t be boring!		<input type="checkbox"/>

References



Reading

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3. McLoughlin, Catherine; Oliver, Ron (1998). Maximising the language and learning link in computer learning environments. *British Journal of Educational Technology* 29 (2), 125–136.
4. Salmon, Gilly (2003). *E-moderating: The Key to Teaching and Learning Online*. Routledge. New York, New York.
5. Tucker, D. M. (1973). Some relationships between individual and group development. *Human Development*, 16. 249-272.
6. Wells, G & Nassaji, H (2000). What's the use of 'triadic dialogue'? an investigation of teacher-student interaction. *Oxford Journal of Applied Linguistics*, 21(3). p.376-406.

Module summary



Summary

In this Module you learned the basics of facilitating workshops. As you progressed through the materials, discussions and activities you may have noticed that facilitation is less about teaching in the traditional sense and more about team work, leadership, conflict and diplomacy. These are powerful skills that you can use to great effect outside the classroom in your work and home life.

You also learned in this Module the finer skills of presenting, group dynamics, what it is to give and receive feedback and to ask intelligent questions. From this Module you should be a better leader, diplomat, facilitator and, we hope, a better person.

Assignment



Assignment

Practice Teaching Exercise

Purpose

The goal of the five minute practice teaching exercise is for each of you to:

- stand and deliver – up in front of the group
- develop a taste for timing

Process

- video-taped (optional)
- peer and facilitator feedback
- self-assessment using the videotape to identify strengths and areas that require improvement

Outline

Using any content you like (your last vacation, a recent course you took, your own subject matter etc...) here's what needs to be included in your 5 minutes:

- a strong WII-FM
- concepts brought to life with a metaphor, quote, story, or statistic
- introduce a learning activity

To do this, you'll need to:

- think through who your learners will be
- get familiar with your piece of the learning curriculum, including the set learning objectives