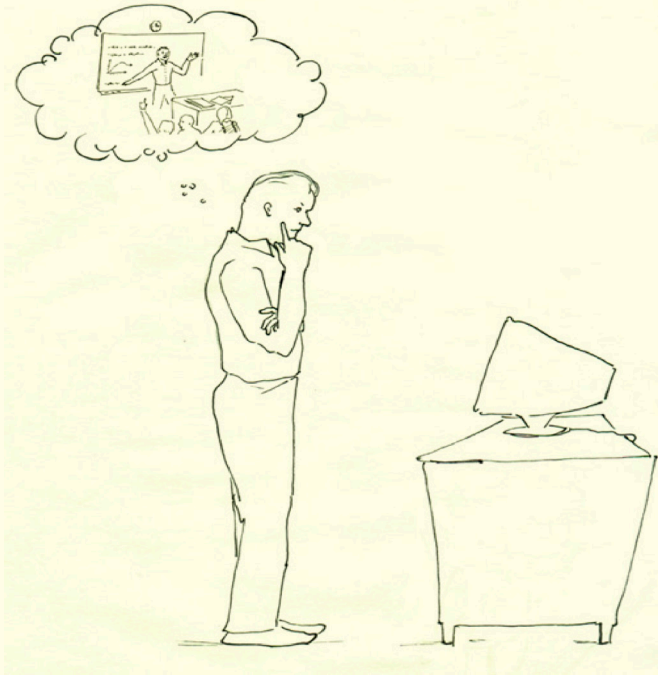


## CASE STUDY 9 I AND THOU





## Case Characteristics

This professor's profile was different from the preceding case in that he was less advanced in his career (ASC) as well as the reason why he got involved in online learning: because of his department (O). But in contrast to many of his peers, he was actually very interested in experiencing the design, development and eventually the delivery of his course online. Like the professor in Case 7, he had a reasonable amount of time to devote to work on the design of his course (3). His course would not be offered online until the following year (3) We ended up meeting much more than most of the other professors, on a par with Cases 6 and 8 (8+). Like most of the others, he had never taught a distance education or online course and knew little about the design process (1/1). His course syllabus included general objectives, but not specific objectives (2).

Table 14: Characteristics of the subject matter expert

Gender	Rank	Reason	Time	Availability	No. of sessions	K/ Design	K/ DE	GO/ SO
M	ASC	O	3	3	8+	1	1	2

**Gender:** male

**Rank:** ASC = mid-career (5-15)

**Reason:** O = organizational

**Time-to-delivery:** 3 = in more than 4 months

**Availability:** 3 = 31 to 45 hours

**Number of sessions** = 8+

**Knowledge of Design** 1 = novice level

**Knowledge of DE:** 1 = had never offered a course via distance education

**General Obj. /Specific Obj.:** 2 = GO only

Before we met, I obtained a copy of his course syllabus. As in the two preceding cases, I decided to present the tutorials on congruency and design method during our first meeting. Once again, this course was not ready to begin immediately and we had at least six months ahead of us to design it.

*The problem discussed earlier with regard to the IDCs getting involved at the start of a course project now appears, for all intents and purposes, to be settled. To avoid any further mishaps, I simply did not inform them of my meetings with faculty. The situation I had previously experienced with one of the IDCs that ended up getting the project leader involved confirmed*

*my gut feeling that the IDC should only get involved in the process once the ID and the professor have had the time to actually design something, so that there is something to develop. Their getting mixed up in the design process simply makes matters more arduous (as if they weren't hard enough already...).*

**Session 1:** At our first meeting, I introduced myself as usual, described my role and simply asked the professor to talk to me about his course. He explained that it was the follow-up course to one that I had previously worked on. So, this time, I knew exactly where his course was situated in the program. We thus moved along expediently, analyzing his general objectives and avoiding redundancy. Our analysis confirmed that his course had different objectives from the others. Only a few elements overlapped, at the end of the first course and at the beginning of this one, which we judged to be perfectly acceptable and even pedagogically necessary to demonstrate continuity. Even though the professor had already given this course several times, he now had to modify it to present it to a group of students with a different profile. He explained that he wanted to develop a *lighter version*.

This part (the analysis) went quite quickly since he knew exactly what he wanted to do, which types of knowledge he was targeting (mostly knowledge skills but also some metacognitive skills) and which general objectives he wanted his students to reach. The distribution of his general objectives (GO) throughout the course was, as is common, sorely missing. Moreover, he had not identified any specific objectives.

At this stage, I asked if I might present the model I had been using with other faculty for planning online courses and he accepted. I explained that many professors had already made use of this model and had generally obtained good results. I started by explaining the congruency principle. His reaction was enthusiastic and he was impressed by the simplicity and the clarity of the presentation. He also really liked the idea of using graphic animations of the more detailed concepts and wanted to try to design a few with me, because he had a lot of abstract concepts in his material.

I next presented the horizontal course syllabus (HCS), with the steps we would go through and why. Again, he said that my explanations enabled him to understand the direction in which we were moving but

he voiced an underlying fear that the process would be overly ponderous. He was concerned that we would not have enough time to do everything. I outlined how I imagined we could build his HCS and that, in doing so, we could move through all of the design steps efficiently, ending up with an improved course that would likely produce foreseeable results. He said that, although he really liked the HCS idea in principle, he was still concerned with time limits, stating that he had heard from his colleague (in Case 8) that the amount of time it took to get a complete course syllabus done was *crazy!* I told him that we could start by simply transferring his current syllabus directly into the HCS grid and that, by working systematically, we would probably have it more or less completed in approximately three hours, that is, depending on what learning activities he already had designed and developed and depending on how well developed they were. I had to recognize that, were we to start from scratch, developing Individual Assignments and Team Assignments might indeed take a long time, even longer if we didn't get at it.

**Session 2:** We did...get at it. We divided up his GOs and distributed them throughout his course, adding some new ones on the way. His current syllabus was quite well defined in terms of content distribution as well as identifying the textual resources he intended to use. He had created, in fact, a compilation of texts (mostly from the public domain on the Web) and had set up a document format template for purposes of harmonizing text presentation. He would still be able to use it in his new, redesigned course but we both realized that he would likely have to reduce the number of required readings per week and maybe even add a few, easy-to-read “popularized” texts (mostly articles from general circulation newspapers and mass media) to take into account the non specialist characteristic of this new group of students.

Between the last case (Case 8) and this case, the technical support unit had decided, after complete testing had confirmed system robustness, to use the synchronous platform to disseminate part of the course and the asynchronous platform for distribution of course-related documents. Since the implementation of the synchronous and asynchronous platforms, the overall course delivery system was quickly taking form. The technical team even offered on-demand, pre-recorded technical coaching resources 24 hours a day, 7 days a week; they also offered individualized

back-up for faculty by telephone or online chat during business hours plus extended evening hours (for night courses). I reminded the professor about the message from tech support that was supposed to have been sent out to all faculty and students who would be using both platforms. He appeared not to have noticed it in his email. I answered his questions as we moved along and told him he could have more intensive training on demand, as soon as he had more time, especially on the asynchronous platform which required about a day of training to learn how to use most of the course design features. In terms of the synchronous platform, I planned to have the IDC introduce it to him after we had made some headway on his course.

All of this talk about course delivery now had him wanting to discuss what his first course would be like. He admitted experiencing angst at getting started. I explained that the IDC would first train him in using the system. Then, on the day of his first class, the IDC would also demonstrate to students how the virtual classroom interface worked, especially how to use the microphone and emoticons to provide feedback to the professor. The IDC would also show his students how to access the asynchronous Web platform to retrieve course documents, use the forum, email, etc. Afterwards, he could then present his syllabus to his class, as he would in his on-campus classroom. He seemed satisfied.

We then returned to his course syllabus and to the HCS. We looked at week 2 and the professor told me how he usually got his course underway, by trying to activate students' prior learning from the first course of the program by focussing on the basic foundations of the field and by using a sort of interactive game of questions and answers that his students seemed to find motivating. Like one of his colleagues who taught another course in this same field, he frequently used the inductive approach to stimulate students' critical thinking. He wondered if the synchronous platform would be up to this spontaneous and quick type of exchange. I replied that he had to be aware of the momentary lag in communications required to open and close the microphone. I told him that, according to professional journals (like *EDUCAUSE*) which report on faculty use of new technology, it did seem to take some getting used to but that, after a few weeks, most faculty members tended to take it all in stride. However, only a trial run could convince him of that. Given his edginess over this, I wrote a note-to-self to request setting up the professor's account on

the synchronous platform and to book an online session with the IDC as soon as possible.

We now started looking at how his course materials fit in his course to determine what exactly required redesigning. Just as in his on-campus course, he expected his students to do their weekly reading outside of class. He showed me the texts he intended to retain and which ones he would drop because of their difficulty, reminding me that this course, although compulsory for students in his own field, would now be open to students from any field, as an elective.

This session ended with the elimination of several texts. However, from the start, I had tried getting him to work on his general and specific objectives. I had hoped that we would be able to at least make a first pass through his course before finishing this session, but we had not. He then explained to me that he often worked from home and consequently was not often available for meetings on campus. I suggested that we try free screen-sharing software and showed him how it worked.

**Session 3:** Once we got connected online and I could see his screen, I suggested we begin this session by reviewing his general objectives, making sure they were evenly distributed throughout the twelve weeks of class. He managed to use the screen-sharing software without much difficulty and I followed his work on my screen, asking him questions while also making suggestions. It was of course a provisional distribution since general objectives often change places once we start writing specific objectives. As work proceeded, I asked him to talk about each week of class. As he did so, he granted me control of his screen and I began proposing various formulations for specific objectives. We assisted one another in correcting what we came up with and ended up with a list of specific objectives for Week 2. I suggested we continue working on Week 2, identifying at least one individual activity as well as the plenary session activities, before moving on to writing the specific objectives for the next week.

*This strategy stems from an observation I have made during the course of this study. It is theoretically possible to either adopt a vertical strategy in formulating HCP components, i.e. develop all of the elements in one column, or adopt a horizontal strategy, i.e. complete all the elements*

*in one row before moving on to the next row. I have tried out both and the horizontal strategy seems to give the best results. This was probably because professors exhibited greater satisfaction when they were able to close the loop on all the activities in a given week, before moving on to the next week. But when I asked them to design vertically, i.e. define all of the specific objectives for their course at one fell swoop, it just didn't happen. (I understand—if I were not a designer, I might also find the entire process unsustainable.) Consequently, I have adopted the horizontal strategy. After setting the specific objectives, I move along to the course content, then the individual activities, the team activities and finally, to the plenary session activities for that given week. I have also observed that the horizontal alignment of elements (in a given row) cannot begin until the general objective(s) for that week are identified. The winning strategy seems thus to be a combination of a horizontal strategy and a vertical one in that the process is initiated vertically; we provisionally define all of the general objectives for the course and then distribute them evenly, week by week, then continue on horizontally developing all of the elements in a given week.*

With our cruising speed now firmly established, we succeeded in completing week 3 before the end of the session. The professor already had some individual activities planned but none for the team. I emphasized the pedagogical usefulness of team activities in online learning (i.e. they promote engagement and commitment) and we ended this session by exploring various types of team activities. We looked at the typology I had produced earlier (see Appendix 3) and he identified a few types that would likely suit his targeted course objectives. I also brought up the usefulness of his implementing a forum in the asynchronous platform and explained the difference between a *student-directed* forum and a *professor-directed* forum. He could choose either of course, depending on whether he had the time to get involved or not, or he could choose to limit his involvement. He liked the idea of creating a shared space in which his students would be free to discuss matters among themselves and was interested in participating from time to time. Then, after thinking about it, he said he was concerned that we would not be able to assume all of these new, online course-related tasks. He therefore felt he would be content with monitoring the progression of discussions in the forum

without personally intervening. He was ready, however, to propose a weekly theme to be discussed and already had some excellent questions to initiate a debate, related to the cases studied during the week.

So, as, this session wound down, I resolved that, between now and our next session, I would ask the IDC to train the professor in using the synchronous platform to help him understand how the virtual classroom worked, thereby alleviating his worries. At the next meeting, we would also look at the steps involved in planning and preparing for his plenary sessions. In the meantime, we agreed that he was to continue to develop his objectives, course content and activities, using the HCS model.

**Session 4:** The professor had indeed been able to meet with the IDC and had tried out the synchronous platform. He said he felt it would perfectly suit his needs and those of his students who might be all over Europe and North America. Moreover, between sessions, he had devoted himself to his work and has produced complete versions of Weeks 4, 5 and 6. I was thrilled! We began reviewing his work and I noted that he had succeeded in developing his specific objectives (SO), in clearly identifying his content and in linking both to activities with great precision. I picked up on a weakness in his specific objective-writing, however. Rather than enunciate the specific objectives he expected his students to meet, he tended to simply draw up a series of tasks to be completed.

*I noticed that distinguishing between writing objectives and identifying tasks to be accomplished is a recurring difficulty among professors. Whereas an objective answers the question “what is to be done under what conditions and to what extent?” a task is simply how something that we define is to be done. I feel my chickens are coming home to roost... thus far, I have not required that professors write complete, Mager-based, three-component objectives because I recognize I would never get them. Instead, I have encouraged faculty to develop succinct action-verb statements, describing what they want students to achieve. In doing so, I now realize that I should spend more time helping professors differentiate between ends (objectives) and means (tasks). I also realize that I have to be careful to play my cards right. When I insist on details, I tend to “lose” the professors. I realize that design is one part science, one part art. The art of details! Everything is detail in this field, but if the ID is intrusive, if he or*

*she starts, as they say in Québec, “tripping over the flowers in the carpet” (I love that expression!), professors will just drop out of the process. We must therefore let some things go while insisting on what is most important. What is to be gained by doing so? Professors who finish the process! But what is lost? Pride in one’s work as an ID. I’m always thinking: what if a fellow ID sees what we’re doing? Might he or she say something like “This is NOT instructional design.” In other words, one must not only choose one’s battles, but also one’s battlefields...*

The difficulty this professor encountered (as well as all of the others) was determining how far he was to go in developing his specific objectives (SO), i.e. to the point of setting out everything, detailing everything? He feared that “telling all” would put limits on his teaching in two ways:

1) If something unexpected came up in his discussions with his students, there was a risk of his feeling cornered and unable to pursue it because it was not part of the planned objectives. I pointed out that planning objectives is important for that very reason: to avoid aimless wandering through perhaps interesting yet irrelevant “territory.” Without set objectives, there was a constant risk of going beyond course limits.

2) By developing his syllabus according to the HCP, he was worried that he would be giving his students too much information on exam content. When I asked him for clarification, he replied that he wanted his students to prepare themselves for an exam without knowing exactly what would be on it. I asked him if this was justified. If he were asked, as a professional, to complete a task without specific parameters, would he agree? We had a good discussion and, in the end, he seemed less concerned about writing his specific objectives.

We then once again turned our attention to the plenary sessions (PS). He told me about his teaching style which was similar to that of his colleague in Case Study 8. I told him about the *architecture* of the plenary session (as defined in Cases 7 and 8) and he agreed with this type of course flow. Like his colleague, he very much valued dialogue with his students and informal discussion, but he agreed that the plenary sessions should

be focused on answering students' questions rather than on his delivering content. He also acknowledged his tendency to want to dominate a discussion (not a completely unheard-of tendency among faculty...) but that he would like to modify this behaviour. I explained that, by establishing a set process up front, i.e. allowing student presentations, say via a team spokesperson, followed by an open-ended discussion, he could limit his interventions to a synthesis of weekly content at the beginning of class, answering questions mid-course and introducing upcoming content at the end of his class (in reference to Figure 7). Based on this simple protocol, we set out the following parameters for the plenary session:

- Plenary sessions would last two hours (as in Case 8).
- There would be a 10-minute break after the first hour.
- Unlike the Case 8 plenary session protocol, this professor preferred to start with a content synthesis of the current week. This part should only take about twenty minutes of the first hour and, during the synthesis, the professor would use the survey tool to get a better sense of the students' opinions and conclusions about the concepts being addressed (an interactive session).
- The next forty minutes or so would be devoted entirely to presentations by individuals or by team spokespersons (depending on the number of students). They would present their conclusions on assignment questions.
- After the break, the professor would open up the debate on questions from the other students, for approximately forty minutes. He would act as moderator and answer any unresolved questions, in light of students' queries about the weekly assignment.
- Next, over the course of a few minutes, the professor would give a synthesis of the course content for that week.
- The last part of the class would consist of an overview of content for the following week. The professor would use this period to stimulate interest among his students for the issues to be addressed. He would explain how these issues are connected to subject matter previously seen. He would also briefly describe the upcoming weekly individual and-or team assignment.
- At the very end of the session, he would remain online for a few minutes (as he would in class on campus) in case anyone had

questions. He would also offer students the chance to ask him questions in the discussion forum, which he would answer during his *virtual* office hours (three hours a week).

The professor was quite pleased with this protocol. He could easily see himself carrying it out. Because it took into account his pedagogy, he was quite enthusiastic. We planned a meeting with the IDC during which we would try out the synchronous platform. I also enrolled the professor in a weekly, live, online exchange seminar I had recently started, in which faculty members who were interested in the new platform could become accustomed to using the learning environment interface, in both user and in moderator modes, at their own pace, in a non-threatening environment.

**Subsequent sessions:** Having by now established a *modus operandi* which functioned quite well, the professor began preparing one week of activities at a time, sometimes two, sending me everything at least 48 hours before our bi-monthly meeting in which we reviewed his work, shared our thoughts and arrived at an understanding. After each session, I met with the IDC and handed over what had to be produced or simply uploaded. The IDC would then send us any produced material for sign-off. At our bi-monthly meetings, we reviewed work from the IDC and/or tech support team and made any required changes. When we were satisfied with the results, we approved the materials and returned them to the IDC who was in charge of final production.

*I think that the IDC is a bit frustrated with the productions we ask him to complete. Most of the documents are written, even though we have produced a few diagrams (graphical representations). In terms of animations, we don't have many, because the professor wants more time to think about what he wants done, i.e. nice to have versus must have. Consequently, the production team moves slowly, which is unfortunate. I see again that too many resources have been allocated to production and too few to design: a waste of resources because one cannot produce what has not yet been designed.*

And thus ended this course. We succeeded in building this course in six months, from top to bottom. It wasn't perfect and there was still a lot to work on, like the accessories, but for the most part, the work was done and the course could be delivered.

### **Ex Post Facto Interview**

On the design process: "I found it very enjoyable, not only the design, but the entire process which allowed me to reflect on my course. I found the process long, but it helped me in organizing my course differently. I was constantly reflecting on why I do this and why I do that. We sometimes take things for granted. After a while, we even stop asking ourselves questions anymore."

On individual activities: "I have been teaching this course for 15 years. It is fundamentally the same, but some parts have been emphasized, others subordinated. Everything I have taught is there... an internal re-engineering of the course. (What's new?) It is more based on students' individual activities. In the past, it was more focused on my presentations. With the questions being asked, students are forced to find information rather than having the professor give it to them."

On the students: "We were already proceeding by questions, but these were not documented. And the course's clientele changed en route. This course was intended for students (in my field of study) and then I was told it had to be designed for students who only wanted an overview. I had to change everything. Other objectives, other tools!"

On individual activities: "Previously, in class, I would spontaneously raise questions. I had never written these questions down. With this approach [the design model], my students have to prepare themselves in advance. Given the model we're using, they really have to prepare themselves. But habits are hard to break and I find time is being wasted since students only prepare themselves to take notes, rather than prepare themselves to discuss the material."

On student autonomy: "It depends on the individual student. I believe that we can try out this model gradually and see what the results are,

but it's up to the student to adapt. If after 5 years of university studies, they are [still] not ready to work autonomously, they might not be in the right place. Whatever method [sic] is used, there will be dead wood. If the model works for the majority of students, so be it. This model does not promote facilitating the student in his work. It requires the student's full involvement. Our students are often criticised [by my colleagues] in that they have difficulty functioning on their own, in conducting research, in finding answers. Any model that requires students to work, that forces them to reflect, is good. The student must learn to operate autonomously. Our students are already graduates. The courses are therefore graduate level. They already have at least 4 years of university."

On working in teams: "In the beginning, I wasn't very keen on their working in teams. Some work harder than others. I am still not convinced of the merits of this approach from an assessment point of view. On the other hand, I like the fact that they discuss subject matter as a group. It's good to see them discussing in groups. So long as there are no marks involved, fine. Those who are lazy or unprepared for discussions will be left aside. I believe in formative assessment for teams and in summative assessment for individuals."

On teamwork in their profession: "Yes, they must work hand-in-hand with their colleagues. Part of their work is done as a team, but in the end, they also have to bear individual responsibility for their work. In terms of planning, yes, it's done in teams. They are marked on their level of planning ability. Teamwork prepares them for learning how to plan well. Organizing/planning team assignments should be part of their training."

On the design process: "It was a new experience for me to work with an instructional designer. Enriching and interesting. The fact that you can sit with someone specialized in design... you asked me questions that no one had ever asked me before. No one had ever asked me these types of questions. Why do that? Why emphasize this aspect? ... I would do it without asking myself why... So I've improved some things and I enjoy that."

On a major problem encountered: “It was the change in clientele [sic]. That changed everything. Developing material for a certain clientele, putting time into it, then changing everything... it was like working backwards. We should have designed the course for our regular students, and then adapt the material as needed for other students. Creating a customized course takes too much time. We may have to build 4 or 5 versions of the course without a guarantee that the clientele will be there. Some courses do not change, such as a history course, but in my area of study, the course must be adapted to specific needs... such as using relevant case studies for students.”

On workload: “It was hard going to design this course. We would meet for an hour and a half to three hours every week. That’s practically a full course load. The horizontal course plan helped and ended up producing a better course. I often refer back to it,... but associating an objective to content and activities is demanding. It is long and sometimes frustrating to realize that we have activities for which there are no objectives. [...] Preparing this course is like giving a course. I reserved half a day every week for this work.”

On problems with reading material: “The students have hundreds of pages to read, between 1,000 and 1,500 pages per term. On campus, they get their texts from the ‘reserve’ [in the library] and then photocopy them. With an online course, everything would have to be put online and that’s the problem. Re-entering and reformatting data is a huge job but if we don’t do it, there is a copyright issue linked to format. The texts themselves exist and are public domain. Also, some texts are only available from publishers but the new ones are available online. This makes it easier. But student attitudes also need to change... most of the students want hard copies.”

On future course designing: “As for the course itself, I would have designed it as a regular course like I offer on campus.”

On working at a distance: “Screen-sharing is definitely a plus. I really like working directly on the text like that.”

On teaching online with the synchronous platform: “I really liked the direct contact with the students. [The synchronous platform] is far better than videoconferencing but I do like being able to see to whom I am speaking. I fear that online learning is becoming too mechanical. With a [web] camera on the computer, it would really enhance the visual aspect.”

On accessibility to online courses and the interest in offering them: “For students in remote areas or far away, yes, I would accept to do this [teach online]. If there are no other solutions and if the bursary system isn’t abolished, yes, to increase access, I would offer my courses online. [But] we have to make sure that all of the tools and documents are available online, especially since the on-campus students have access to their professors and a full library. But if there are no other means, if the quality is there, and if they have access to the necessary means for their learning, yes, online learning would be OK.”

On the professor’s role: “The professor provides the framework for training and must complete it with resources. The professor assists with the method, but the students must complete it by conducting their own research. No professor can say that he/she covers all the material. That is why we have libraries, computer labs, etc. If a student is led to believe that contact with the professor in class is enough, then s-he’s being led astray.”

On the future of faculty: “I hope that this virtual world doesn’t replace the professor. Some students need the contact but I believe we can adopt a hybrid approach whereby the student comes to class and also uses distance education tools. I wouldn’t want the process to become dehumanized, where the professor goes to his office and spends the day typing on his computer.”

On technology and face to face teaching: “An approach is needed that responds to two types of students. In terms of my on-campus students, I wouldn’t want them to stop coming to class... I wouldn’t want to lose this contact that we have together. But for a student in, say, Nunavut, it would be absurd to make him come here to learn. Some aspects (in my field of study) have already integrated ICT. There is no reason to prevent the

virtual from replacing the face-to-face, but I would be very disappointed as a professor to never see a student again, or have a student ever see me. In the classroom, with 40 or 50 students in front of me, I can tell if the one way in the back of the class has understood me or not. I can immediately tell this by his reaction. He may not want to ask questions for all sorts of reasons. Through eye-to-eye contact, students who may have a question but may not want to ask it are visible. Eye-to-eye contact is so important that I take the time to look at their faces, to make sure they have understood me. With online teaching, how can we manage that? I would not want face-to-face contact to disappear. It would be better to find a happy medium, between face-to-face and online learning.”