EDUCATION ed AT A DISTANCE

USDLA Journal

A REFEREED JOURNAL OF THE UNITED STATES DISTANCE LEARNING ASSOCIATION

March 2002 | ISSN 1537-5080 | Vol. 16 : No. 3

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March Podium

"The Sky is Falling!" said Chicken Little.

Elizabeth Perrin, Editor, USDLA Journal

Many of you remember the children's fable of Chicken Little in the forest, panicked and hysterical because of loud, unexpected noises. As the tree leaves swayed back and forth, Chicken Little was sure the end of the world approached. She announced to all the other animals that the sky was falling. Fortunately, in the fable, the other creatures were wise enough to do some investigative research and indeed, all was well.

Certainly, leaves are rattling in the trees of the Distance Learning Forests. Doom predictors abound. And, as usual, it behooves those of us in education/learning to do our research and provide coherency to observed phenomena.

The article, **Online Students Don't Fare as Well as Classroom Counterparts, Study Finds,** by Dan Carnevale, Chronicles of Higher Education, February 25th, 2002, is a case in point. Professors at Michigan State University have found that students who took an economics course online didn't do as well as the students who took the same course in a traditional classroom. *There is now great uproar in the Distance Learning Forest.* "Students who took the traditional sections on average answered 65.49 percent of the questions correctly, while the students who took the course online got 61.19 percent correct, on average." *Thunder and Lightning.* The extensive report analyzes the test score results, detailed down to gender. In the online course, female students did as well as male students. In the F2F sections, women's scores averaged about six points lower than the average score for men. *Do we hear a chunk of the sky falling in another part of the Forest?*

What is really causing the commotion? Should that percentage bring dismay to academic or university administration? As Lev Abramov pointed out (DEOS-L 28 Feb 2002) "Has the 'low' 65 % figure (which is quite correct for a lot of courses people take f2f) ever stopped someone from enrolling? I guess not. Then why would a 4% average drop frighten potential students off so much?" *Perhaps the roar is abating. A wise Forest Denizen.*

Additional Forest patrols gather. Dr. A. E. Powell (Colorado State University) suggests that perhaps the online course design should be examined, "We know that student achievement can be at least equal in the online course - so the difference must be the design of the online course." Brad Jensen (www.EUFRATES.com) notes, "Preserve…skepticism when the conjectures come clothed in numbers and p values. The significance of the observation should not be confused with the significance of the labeling. A statistical measurement does not contain any meaning in itself." Mr. Jensen adds (perhaps philosophically), "Some people never learn this." Tom Horn (tomhorn@CPROS.COM) asks, "Consider this from the student's viewpoint. What if my choice is between taking an online course or not taking any course?" And, to close, a statement from Dr. Charalambos Vrasidas, Western Illinois University: "I follow with interest the discussion on research in distance education…I think that our quest for certainty has misled us in the study of

education." (DEOS-L, 27 and 28 Feb 2002).

The roar in Distance Learning Forest may be somewhat quieter. Where is Chicken Little? Where are we all?

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FEATURE ARTICLES

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STUDENT EXCHANGE

Student Perspectives

Calli Shelton

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TECHNOLOGY EXCHANGE

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STATE AND INTERNATIONAL EXCHANGE

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Editor's Note: This site constitutes a report from the "frontliner" of e-learning, since the University of Baltimore was the first school to offer all-online accredited Web MBA. The author taught the first course in this Web MBA program, which was Statistics & Relevant Resources on the Web. A second course in this same program was Applied Management Science.

The site covers how to begin, how to operate, and how to make e-learning successful and enjoyable. Its contents are developed over years, and is intended for current students and sharing personal experiences and exchange of ideas with other educators.

Impact of the Internet on Learning and Teaching

Hossein Arsham

Introduction

There have been many technological dawns in the last 30 years, during which the desktop computer and the Internet have been developed; but there have been similar dawns throughout the 20th Century - film, radio, records, broadcast television, audiotape, videotape, programmed learning machines, etc. Each time enthusiasts have announced the transformation or even the end of the school/college/university. In fact, the impact on the bulk of teaching and learning has been minimal. Developments in paper/printing technologies have had far more influence, with the consequence that face-to-face discussion and paper resources still dominate public education. Audio-visual media have been treated more as an icing-on-the-cake than as something at the very heart of learning -- and likewise their long-suffering support services (though the new media, particularly video, have fared somewhat better in the development of corporate training programs). In fact, there is debate in the instructional design literature about whether there are any unique attributes of media that can promote improved learning [see, e.g., Kozma, R. B. (1994)]. *Will media influence learning? Reframing the debate,* Educational Technology Research and Development, 42(2), 7-19].

On hiring an online graduate, employers are likely to be cautious, if not skeptical. The belief is that an online degree is an interesting exercise, but it is not going to be rewarding or valuable as a full-time traditional degree. This is partly, because most employers have traditional degrees and may be reluctant to hire someone with a credential not yet established.

The single biggest advantage in online learning programs is interactivity they offer. One of the biggest issues facing universities wading into online learning is interactivity, both in its level and mode. Just what constitutes 'interactivity' is hardly clear for some instructors. To some people, it means enabling learners and instructors to share ideas in a virtual chat room; to others, merely posting a question on a bulletin board qualifies as interactivity.

As the cost of technology decreases, many universities are finding ways to bring the benefits of the classroom into a distance-learning setting. However, distance teaching has been described as an

industrialized form of education, characterized by rationalization of process, division of labor and mass production. The new information and communication technologies can facilitate this development but only if policy makers are sensitive to the opportunities, especially at an international level. Web-based teaching and learning call for a serious reconsideration of the effectiveness, especially in light of increased demand for education and the opportunities for increased student motivation by new technologies if integrated with knowledge-based design sites.

The operational infrastructure for the effective delivery of a Web-based learning programme is critical to its success. Yet all too often this element is overlooked or seen as incidental to the design and quality of the learning materials themselves. These are the key success factors in teaching/learning that is oriented towards students, who will become autonomous self-learners using the media and the support services. The high quality of the Internet education process means the molding of abilities to learn.

Other issues related to students include their psychological reactions to the new way of learning. They may have a fear of technology. Others may have a low level of technology skills, though this is changing as more university are training students more thoroughly. Some students may struggle with independent learning and feel insecure with an amorphous teacher.

Change may not be easy, but it is necessary, inevitable and often beneficial. Whether your students succeed or fail depends in part upon how well you leverage your full intellectual capital -- and your Web-based course is taking a starring role. Also, think about engaging students in implementing such a learning environment -- share your teaching and students learning together. Keeping interactivity with students, and following the factors outlined in this site will help to ensure a comprehensive, well-thought-out Web-based teaching and learning system -- and helps to safeguard you in the process.

The main question and concern is that: Will technological study aids, from crib notes posted on the Internet to online degree programs, enhance education? Or will Web-education supplant bricks-and-mortar classrooms and perhaps degrade the quality of learning and instruction?

The issues and techniques discussed in this site together with your students' feedback can help you to enhance and become a better architect of your Web-based courses.

Is There Something New Under the Sun?

Learning is the act or process of developing skill or knowledge. Modern, web-based learning and computing provides the means for fundamentally changing the way in which instruction is delivered to students. Multimedia learning resources combined with CD-ROMs and workbooks attempt to explore the essential concepts of a course by using the full pedagogical power of multimedia. Many Web sites have nice features such as interactive examples, animation, video, narrative and written text. These web sites are designed to provide students with a "self-help" learning resource to complement traditional textbook.

In a few pilot studies, [Mann, B. (1997) Evaluation of Presentation modalities in a hypermedia system, Computers & Education, 28, 133-143. Ward M. and D. Newlands (1998) Use of the Web in undergraduate teaching, Computers & Education, 31, 171-184.] compared the relative effectiveness of three versions of hypermedia systems, namely, Text, Sound/Text, and Sound. The results indicate that those working with Sound could focus their attention on the critical information. Those working with the Text and Sound/Text version however, did not learn as much and stated their displeasure with reading so much text from the screen. Based on this study, it is clear at least at this time that such Web-based innovations cannot serve as an adequate substitute for face-to-face live instruction

Stoll (1999) in his book, High Tech Heretic: Why Computers Don't Belong in the Classroom and Other Reflections, Random House, 1999, argues that schools should use funding to improve real education rather than invest in computer technology and rely on telecommunications for education. Further more he indicated that the computer was often a crutch that diverted time and resources from programs taught students to think and evaluate information. Online learning education does

for knowledge what just-in-time delivery does for manufacturing: It delivers the right tools and parts when you need them. However, developing online learning is typically an intense process, which should take much of the faculty development time.

The Java applets are probably the most phenomenal way of simplifying various concepts by way of interactive processes. These applets help bring into life every concept, from central limit theorem to interactive random games and multimedia applications.

The Flashlight Project develops survey items, interview plans, cost analysis methods, and other procedures that institutions can use to monitor the success of educational strategies that use technology.

In a the knowledge corporate world setting, it might be true that two-way communication is not always something they need to have in order to get done with what they are doing, but sometimes one-way audio with optional two-way or with chat is sufficient. Whereas in university environment, the expectation is a lot higher and they require two-way communication in order to have the right level of interaction with students.

The impacts of the Internet on teaching and learning are highlighted in the following section of this site. In summary, a Web-based learning class is more effective learning experience, since the learner is participating in learning process and receives individual attention. Though the instructor and the learner are at different locations, this participation in learning is by itself a positive learning experience. The Web-based learning atmosphere allows more effective interaction between the students and instructor. Therefore, it can be effective as traditional classroom learning environment where the space, seating, etc., could be inadequate.

The Cost-Benefit Issues

Since the dawn of the Internet age, boosters have predicted the end of leafy college campuses as schools go virtual. The miracle of the Internet was supposed to let great teachers reach any student, any subject, any time, and anywhere.

Rapid technological advancement may produce problems and challenges for educational institutions when their products and services are rendered obsolete virtually within a short time-horizon. The Web-teacher who has properly learned his/her craft will have transferable skills and knowledge perfectly adaptable to the emerging technology. The benefit of having transferable knowledge in such a volatile marketplace is readily apparent. It is insurance for survival of the Web- based courses. The Web sites have high dynamic rates of birth and death. The Internet is a graveyard of Web sites who tried but failed to keep up with the contents that the visitors really need from them. Many got on the Web very quickly once it was clear that many new sites were choked with flow and did not have any useful and interesting information. There is certainly a power in the Internet communication, development, and delivery of intellectual materials via this medium we are mastering in our educational institutions. The effective and efficient Web-based teaching/learning is just getting started and survival is the test for quality assurance.

The Internet is affecting the twin disciplines of knowledge management, and content management. Knowledge management is the thinking process of converting information to useful knowledge, while the content management is the published information. The author of a Web site must provide the efficient content management, and the visitor who uses a Web site must have the mental ability for an effective knowledge management. The authors need to learn more about the contents alongside the usability of their sites.

Online education is growing too fast to track. It is predicted a widespread shortages of qualified online teachers. However, educational institutions can train and capitalize on the talent of their teachers who may have retired from the traditional setting.

The rapid growth of information, coupled with the ability to exchange it more rapidly among more people than ever before, is creating a new environment for education. Many universities are negotiating for their standing as the de facto source of scholarly knowledge in new environment.

Hundreds of universities of every sort have been putting some basic courses up on the Web, using sometimes pedestrian software. And students seem to think they're okay. Community colleges and regional universities that have slowly, organically moved into the online arena -- doing their old job in a new way -- have succeeded where the flashy business types and big-time private schools have not.

Today, the web-based course offering continues to grow, however, much of the momentum has slowed, and realizing the enormous costs of launching efficacious courses' online. Programs that are pedagogically sound but not fiscally sound may not be endorsed by the administration because of financial strain to the organization. Conversely, the faculty whom it represents will not endorse programs that are fiscally sound but not pedagogically sound. The main approach is to develop or maintain programs that are pedagogically and fiscally sound.

The administrators are focusing on cost-effectiveness in which educators can deliver their intellectual materials whole targeting this transformation in teaching/learning. However, one may ask: What are the driving factors behind technology-based changes in teaching and learning? How does institutional culture fit into the picture? Do they have the necessary resources? Student-fee structures have always been unfair often, when online students live hundreds of miles away, must pay fees for campus services become a source of considerably greater discontent? Th main concern is in targeting the transformation of learning/teaching through technology while reducing the cost.

On the other hand, the new state and federal policies, advances in services to students, new costing of technology methodologies, evolving accreditation and quality assurance issues, new e-learning projects and new institutional practices.

For example, the impact of class size is of concern to all parties involved on Web-based learning/teaching. It takes 2 or 3 times as much time to teach an on-line course as a face-to-face course. An on-line course that works for 10 or 20 students may be impossible with 100 or 200 students. With face-to-face courses where the students are met simultaneously, the repetition in providing student feedback may be much less than in asynchronous teaching. Thus, on-line teaching may not scale as well as face-to-face teaching?

Itemized Factors to Optimize the Learning Environment

What is the best we can do to optimize the conditions for the instructor, and the learner? How do you maximize learning in a short amount of time and still emerge with a deep, internal body of knowledge?

It Works If You Work On It: Unlike Web-based courses such as Information Systems, where the medium is the message The first question to ask is whether the context determines the nature of the knowledge to be learned? This is an important question, because different sets of contextual practice related to the knowledge in question need to be acquired in order for learning to be successful. Computer competency is becoming as necessary in the modern workforce as writing competency, and it is necessary for educational institutions to adopt computer literacy requirements for their students.

Since the University of Baltimore was the first school to offer all-online accredited Web MBA, I had to make fast and important decisions, such as how to begin, how to operate, and how to make e-learning successful and enjoyable. In creating the Web sites in both courses, it was beneficial to see what is taking place on the WWW. I've devoted a considerable amount of time, searching the Web and collecting reliable relevant information (which was available at that time) and then published a few articles for professional journals entitled, such as, "Statistics on the Web".

Although the content of my course is the same, the means of delivering are different. Launching headfirst into Web-based instruction is not for the timid. Many are jumping on the "bandwagon" and using Web based materials in their teaching, but just how effective are the efforts? If you can't teach better with technology, don't use it! Merely using Web-based materials in the classroom or assigning URLs for supplementary reading may not be an effective use of these materials. There must be forethought and careful planning in order to make this a meaningful experience for the

educator and the student.

Traditional Education emphasizes learning content; learning the "what." The information age, however, requires people who are competent learners, who understand the process of learning, the "how." Although I believe that real learning occurs in a social context because of the quantitative-based contents of my courses, my courses have not much use of the Chat Room. I feel from my own point of view and my own standards, my first online teaching experience was a success. I am glad to share my conscious findings with my colleagues who may wish to teach via the Web. My experience is based on teaching two particular courses to some groups of students; therefore, one must be careful in making any generalizations.

In the very near future, we will be a "learning society" in which education is universally accessible, and lifelong learning is promoted among young students and working adults alike. To learn is to face this transformation.

Learning and Teaching Style: I would like to insist that most parts of my courses required a particular learning style known as learning-to-learn. The effective and efficient learning style for these courses is doing your homework assignments on a regular weekly basis and learning from your mistakes whenever I provide feedback to measure the effect.

The teaching material and teaching style must reflect the change in the real world, which students may not know because they have not been there yet. Unfortunately, some instructors are still using their well over 10-years old lecture notes. Adding to this problem by doubling the difficulties for students, some instructors are devoting not some but most of class time for students presentation and group work. The instructor does not want to lecture most of the time. A few do the extreme opposite "I know, you don't, I'm going to tell you." Some instructors may buy a reputation by many false means such as giving good grades to all (sometimes all A's), not giving any exams/test or projects.

Satisfying the Needs of Your Student: The following items are proven useful to student's learning process:

1. Know each student's level of knowledge of the prerequisite(s) topics: Give them your prepared questionnaire to fill-in without writing their manes on it. Analyze the data and update your lectures to meet their needs.
2. Provide an overview of the course material in the first lecture. Ask them to write a 2-page essay what this course is about. This assignment required reflections from students, motivates them, and increases their interest about your course.
3. Assign, collect, and grade homework on weekly bases. This enables you to find the weak spots of each student. Ask students to re-do the needed parts for a "full credit". If in the second attempt still some students have problem, then give him/her the solution set, together with a few word of encouragement to revise and resubmit for a few points credit.
4. Put aside one class for review and students preparation for the midterm examination and one for the final. This review session encloses putting together the topics they have learned every week to the wholeness of the material they have learned. Provide also a past sample exam to do as part of their homework.
5. Prepare a "My response to the last class questions" in writing and distribute. This reinforces and encourages students to ask good questions. It also helps if any student missed your last week lecture. You may like to put this collection of good questions on the course Web site under FAQ. This page also enclosed a section titled "How things can go wrong" which contains all common mistakes students made during weekly homework and their exams. This will be helpful for their later review and learning from their mistake not to repeat it.
6. In your midterm and final exams you may put some open-ended questions such as, "What are the three most significant topics you've learned up to know" Ask them to write a short paragraph for each.

Evaluating Your Success: Have Your Student Learnt It? Web-based courses are being used either

as credit or non-credit, While the use of these means of knowledge delivery may offer many advantages about developing more independent learners, there are also information handling skills which students must acquire.

As a new online moderator you will need to know how to carry out online the everyday activities of a teacher: how to build relationships with and between your students, how to encourage participation, how to start and stop discussions, how to deal with the shy, the dominating, the aggressive and the just-plain-awkward. I do encourage you to re-interpret your skills in terms of the new medium and to identify where online teaching can make a unique contribution.

A teaching portfolio is a tightly written, reflective document, summarizing an instructor's approach to teaching and learning, and providing evidence of significant endeavors and achievements in teaching. In is relatively easy for an instructors to make a case for his/her effectiveness as researchers, but it has not been so easy to justify effective teaching. Having a teaching portfolio can:

- help demonstrate your understanding of professional issues associated with effective teaching and learning and support this with documentary evidence; * assist in self-evaluation and professional development.

The credibility of the case you present in a portfolio depends largely on how well you link claims about effective teaching practice to evidence. The evidence you select and present should make the task of judging competence or excellence both straightforward and reliable.

Self-Assessment for Continuous Improvement in Instruction: We all have high expectations of what Internet can do for our education institutions. While we all agree that e-learning offers great promise, we must be certain how to achieve it. Clearly, if we don't set our sights high, we could fall significantly short of our goals.

I do consider the following items as important factors for continuous Improvement in my teaching:

- Throughout the semester, information (objectives/content/assessment) was clearly given.
- Student was able to locate and use suggested resources.
- The various components of the unit were clearly linked to one another. * Activities in my course enhanced my students' range of knowledge and skills in the content area covered.
- The professor presented material clearly at the level I could understand.
- The professor appeared enthusiastic about the material being presented.
- The professor used techniques that stimulated my interest in the content being covered.
- The professor assisted students learning by being available for discussion/questioning/clarification.
- The professor appeared to be well prepared. That is, the professor as a source, providing messages containing the relevant knowledge of the field.
- The types of assignment set, seemed appropriate. This provides a good channel of communication between the student and the teacher.
- Written comments on material returned were helpful, informative, and returned in a reasonable time. The feedback is used as a means to measure the effect of online learning and teaching.
- The professor displayed good skills in methods of communication.
- The methodology and tools used facilitated the learning process.
- The professor taught me to think for myself. The student as the receiver of the knowledge, understood the material.
- The professor demonstrates confidence in his knowledge, well informed on technical and professional advances and his role as a teacher.

Clarity in Expectations: Goals and feedback must be unambiguous; otherwise, it is hard to mange your course.

Integrity of Transactional Distance: There must be a commitment to the integrity of transactional distance. The instructor must use effective strategies to increase dialogue interactively. However, the instructor must adapt to minimize the engagement on personal matters. Otherwise, there is a point at which the dialogue about personal matters takes over, and the original learning objectives are compromised. The other problem might be that a very few students took over the dialogue, and turned it into a monologue.

Continuous Evaluation for the Quality: The logical role of the professor has changed. Instead of evaluating the available texts and selecting the best, it is necessary to sift through a huge volume of possibilities and recommend the most legitimate. Even the most diligent scholar is unlikely to be able to read even a small fraction of the available material in his or her specialty. This is one reason that the traditional publication process still exists although the review process is done via Internet. The blind review process still serves the purpose of separating the valuable from the useless.

Quality Assurance as a Measuring Tool and Decision Procedure: Unfortunately, in some existing web-based courses the asynchronous communication is inadequate in both the turn-around time, and the lack of psychological connection between the learners and the teachers. A Web-based course provides new challenges for a student regarding interactivity with the teacher and other students. There must be a Quality Assurance (QA) process for all components of a Web-based course such as, hidden question within the notes, assignments, feedback, computer-assisted learning, and exams. The QA provides a measuring tool for these components and promotes a decision procedure for allocation of resources for creating an effective learning community.

The following are a few items for considerations while doing the QA process:

- Organize: This good housekeeping ensures less confusion. Organization brings mental clarity and order.
- Systematize: This focuses on efficient and effective methods.
- Sanitize: Eliminate any junk files and maintain a clean and virus free environment.
- Standardize: Students must be given sufficient information about all aspects of the learning process.
- Sustain: This requires self-discipline to maintain a good practice of the above items.

Readiness to Start: Make sure each individual student has the preparation needed to enter the course. You might ask each student to fill in a Questionnaire Form. For example, for a statistics course, knowledge of Algebra is required. To make sure every student has a necessary understanding of Algebra, I first give them a test for diagnostic purposes. Then, I work closely with a few of them for a week, to bring their knowledge to the required level. This is done by me, (not by any tutors), prior to starting the main course.

Giving Them Credit: Don't expect virtual students to do something you ask them to do without promising to give them some credit for doing it.

Understand Student's Needs: Understand students' feelings and experiences. Communicating by email may make it harder to convey feelings such as concern. Prompt replies to questions at least shows we are paying attention. "One size fits all" seems to be bad advice. There are great differences among individual students.

Web-based Teaching Is More Time Consuming: Teaching on the Web is not really about distance learning. It is a new kind of education and a new way of learning. The teacher has to be available everyday. Students expect instant response. For each course you are teaching, you should expect spending much more (two to three times) amount of time compared with face-to-face teaching.

Giving Them Choices: Student must have a variety of possibilities from which to choose. I tried to give more flexible assignments, giving the students choice of the site to review. More motivated students pick the "harder" assignments and feel challenged by them.

Trusting You: Students must feel comfortable enough to set aside the defensive shield.

A Challenge to Teach Virtual Students: Match the abilities of the students to the task. When you're not in the classroom, you miss the glimmer of awareness in students' eyes. It's difficult to tell whether they are getting the subject or not. If you don't give them enough stimulation, they will get bored; if we apply too much they will feel overwhelmed. As every student is different, it seems the best approach is to give a variety of options. Again, the Internet can accommodate a variety of students better than videotape, but it's an exponential increase in investment in producing the materials.

Humanize the Topic: Learning process and product must have personal value to the student. Otherwise, on-line work is extraneous or even a distraction. I experienced this at first, but now I build the materials and tasks within the teaching framework and the assignment structure.

Partnerships with the Learners: To Educe means to bring out a potential existence. Education, therefore, is a process of intellectual growth. The biggest impact of the Internet is to change the point of view that education is something can and should be delivered. Education comes from learning, not teaching. The world's best teachers are not repositories of knowledge, but skilled navigators who lead young minds to discovery and understanding. Learning is about reinventing the wheel, and may all learners have the opportunity to do so. The educator is merely a midwife in this process.

The concept of Web content management systems removes the Webmaster bottleneck and put subject matter experts in charge of content creation by learners' interfaces that turn students into content contributors. Learning on the Web requires partnerships. People learn best when they learn in context. It requires partnerships between teacher and individual student, between the course and the relevant business discipline.

Hard Choices for Teacher and Easy Ones for Students: Teachers have to make choices before starting on new technology. New technologies can be seen as a means of linking students with each other or with you. The following questions are relevant to success of the teachers who create content for the course Web site by adding appropriate metadata to that content:

- Are students familiar with the topic or not at all?
- Does the learning process give the students the choice of choosing the resources?
- Has the professor taught the topic before?
- Has the professor published any articles on this topic before?
- How much time is available? Is there only one author or is there a team?
- What is the level of complexity of the content?
- What skills and experience are students expected to have?
- What resources are available for development?
- What is the expected life of the materials?
- What is the size of the class?
- What media may be used?
- What existing resources can be used?
- What opportunities will there be for interaction with learners?
- What will be the balance between resources directed at developing resources for learners and resources directed to supporting individual learners as they study?
- What will be the balance between resources directed at initial development of resources and resources directed at ongoing maintenance and enhancement of the course?

Core Items for Teaching Effectiveness Evaluation: When evaluating Web-based course, one may get bogged down in the container and lose sight of what should be the real focus of the contents, and its interactivity. The following list identifies some characteristics of effective, interactive Web-based learning to help you sort the best from the rest.

1. The professor made it easy for me to know the standard of the work expected.
2. The professor motivated me to do my best work.
3. The professor made a lot of comments on my work.
4. The professor gave me a reasonable amount of time to understand the work I had to learn.
5. The professor seemed to understand difficulties I might be having with my work.
6. The professor normally gave me helpful feedback on how I was doing.
7. The professor was good at clearly explaining new ideas.
8. The professor asked me questions just about facts.
9. The professor made the content of the unit interesting.
10. The professor made it clear right from the start what she/he expected from students.
11. Overall, I was satisfied with the performance of this professor.

Technological Aspects and Issues: One may provide the following Online Questionnaire to the students within the first few weeks of semester to for any opportunity to improve and/or modify the technology aspects of the course.

A Typical Online Questionnaire for the Technological Concerns:

Good relationships are built on mutual understanding. When students can use the course site to get the targeted information they require, they are more likely to be in touch with the instructor on a more regular basis. That kind of interactivity promotes stronger relationships and deeper bonds between the students and the instructor.

The following paragraph highlights the process of collecting feedback from my students to improve the course Web site intellectual materials, and its structure to fit the needs of your students:

Tell me you think of your course Web site. By filling out this form you are helping me to improve my services to you. If you didn't find what you want, or are dissatisfied in some way with the course site, or would like to see a resource added, or would like to tell me what you did like or just want to give some feedback. The form contains important components of the course site, and I will take your comments and feedback into consideration to improve it.

It Is Hard to Get Teachers to Discuss and Expand on the Material for Online Students: Direct communication is a key element to the online learning success. In many instances, unfortunately, the teachers write course guides for online courses and there is hardly, if at all, any involvement of teachers with students. Often when authoring course guides, teachers tend to make itemized lists of points or restate verbatim what the students' textbooks have already stated.

There must be interactions between the teacher and individual student for building a community of learners. Having the course material online is not the essence of online courses, but the energy that flows into it, throughout the semester. This energy is the enthusiasm of the teacher to care, motivate, and make sure student understand the material for themselves.

Some of my readers may even say, "It is hard to get teachers to discuss and expand on the material for online students." I do agree with you, it's an unfortunate environment, however, there are remedies for overcoming this fault, by means of asking the teachers the following two questions:

a. How do you know for sure that your students understood the material you've assigned?
b. You do not want to find out, say at the of time period, that most of you students are left behind. How do you make sure each individual student's progress is adequate?

To enforce communication among teachers and students, I believe, the frequent homework

assignment as I have already outlined on this site, is a must. Homework assignment and feedback from the teacher could be used as one of the performance measure factors for the teachers. An enthusiastic teacher changes problems into challenges.

High Tech and High Touch: Because the instructor cannot see their students he or she must maintain a high level of engagement. While lecture and other types of information dumps have their place, encouraging students to introduce their own experience and reactions is critical to the success of the online course. It helps to keep the training "high tech and high touch". Setting up an environment in which students may participate and share using multiple outlets, students stay involved and are motivated to come back to you.

Dialogue and Knowledge Sharing with Your Colleagues: Knowledge management and peer-to-peer enthusiasts share a common desire to realize the true potential of Internet course delivery. Establish dialogue among other faculties to make sure your course is relevant to what students are learning from other professor. This knowledge sharing aspects among faculty enables students to see the place of your course within the program they are pursuing. For example, every course in your MBA program is, without exception, about making good decisions in a particular aspect of business, from accounting to marketing. For example, Economists like to refer to their discipline as the science of choice. And they often use the definition "a set of principles for allocating scarce resources among competitive means" All courses in your MBA program, might possibly seem to you as pieces of a sculpture scattered around. I know that you have immeasurable longing to see the whole. Your course must bring together what belongs together by means of a unification, and integration with other courses.

Students Are More Than Your Customers: Question: What makes a restaurant experience at one establishment more pleasant and attractive to a customer? Answer: Delivery of timely, quality, personalized service. The same applies here for the educators. Technology helps us to deliver more personalized, timely service to students. It's the definition of quality for existing and coming technologies that we need to define. What is quality education in today's global society? What is quality use of technology in educational delivery? I do advocate individual mentoring. You should allow "jumping in". This brings about the needed trust and effective communication in mentoring your students.

Teacher as a Facilitator of Learning: Although the Web does not provide any novel pedagogic strategies it allows students to assemble coherent sets of media rich resources very easily. Meanwhile the role of teacher evolves from teaching of knowledge to being a facilitator of learning.

Educating is not a problem in search of a solution, but a matter of teacher and students trying to do things together that were intrinsically difficult; Teach & Learn. However, students in front of computers are as likely to be entering a state of 'entropic mindlessness' as anything else --- I've had an experience, but where is the learning?

Teacher and Student Are One: An important principle in teaching on the Web is that a good test of whether a student has learned the material or not is whether this student is able to successfully communicate it to others. Since we measure teacher performance in much the same way, the emphasis here is on having the student identify him or her self as "a teacher" early on in taking your course. In fact, after having some experience, you will realize that the teacher and student are one.

Student's Active-engagement Process Defines Success

Students will work in an active learning setting known as the collaborative learning environment. To accomplish this, I will pair you with another student to provide you with immediate support. Communication is a vital aspect of any distance learning program and it is especially true with this one. That is-- so that you don't feel isolated. You won't be, and I don't want you to feel like you are.

Since humans have evolved to speak face to face, it takes more brainwork to adapt to new forms of communication. With the phone, for instance, we can hear but not see, so our brains have to work

harder to communicate. E-mail is a step worse, since we can neither see nor hear. Current study shows that e-mail takes five to 15 times longer to get the same message across compared to speaking face to face. Therefore, having a live person that students can talk to during the office hours is proven to me to be very effective in learning.

The single biggest advantage in online learning programs is interactivity they offer, even with the instructor and the learner at different locations. This participation in learning is by itself a positive learning experience. The Web-based learning atmosphere allows more effective interaction between the students and instructor. Therefore, it can be effective as traditional classroom learning environment where the space, seating, etc., could be inadequate.

As a new online moderator you will need to know how to carry out online the everyday activities of a teacher: how to build relationships with and between your students, how to encourage participation, how to start and stop discussions, how to deal with the shy, the dominating, the aggressive and the just-plain-awkward. I do encourage you to re-interpret your skills in terms of the new medium and to identify where online teaching can make a unique contribution.

To enforce communication among teachers and students, I believe, the frequent homework assignment as I have already outlined on this site, is a must. Homework assignment and feedback from the teacher could be used as one of the performance measure factors for the teachers. An enthusiastic teacher changes problems into challenges.

Student's Preparation for Taking Online Courses: I've observed that, some students enrolled in online courses have difficulty adjusting to the new environment. While others actively participate, e.g., in discussions boards. And the third group somehow is lagging behind. A preparation process can overcome these difficulties before taking any online course. This may include orientation sessions, efficient time managing skill, staying focused, etc.

Interactivity Is a Must: Students will enjoy the course more if they are able to complete the tasks. Interactive online materials can give the student more rapid feedback than when work is turned in on paper and the evaluation comes back in a week.

In interactivity, what I seek is "what's going on in the student's head", in the dialogue between 'what I already think I know' and 'what I am trying to understand at this moment with the help of these resources'. If the computer can facilitate this, then hooray. But let's face it; books have facilitated this dialogue for the 'mentally engaged' student for centuries! The problem we have always faced is that you can't see that interaction taking place in the student's mind, so there are no guarantees; and how do you get the mental engagement in the first place? It can be a cop-out to assume that interaction with a keyboard is a visible sign of mental engagement and interaction.

Whenever interactivity concept implemented effectively, the result is a self- evident. As in a real classroom, one can automatically feel a connection to the teacher, even without meeting in person. The learner is able in expressing his/her feeling of excitement in learning, or perturbed about something he/she has done wrong.

How to Promote Teacher's Interactively with Students: The Internet has brought about dramatic changes in interactively and knowledge development, but extended educators should promote the same kind of interactively, discussion, inclusion, etc. in print media.

One way of motivating students and instructors to get actively involved in learning and teaching respectively is to have a few hidden questions within each weakly lecture note. Students are responsible for those questions too. These hidden questions are open-ended type, and not exercises. I find this approach effective in promoting interactively with online students.

Knowledge Sharing with Students: Incorporating student knowledge sharing into the design of our computer mediated learning environments also allows us to create true online communities in which students communicate outside the boundaries of the classroom. Only the learning resources must be delivered that bring about the desirable results such as focused learning, diffused learning to open your students' minds to new ways of developing thinking-for-themselves.

Anatomy of Online Courses

The content of an online course is usually identical to the on-campus classes, but the delivery method is different. Instead of attending weekly on-campus sessions, students take the course as an Asynchronous Learning experience which means learning from anywhere at anytime using your own computer. Instruction will be delivered via Web pages, and e-mail.

Most likely, students will use the discussion forum for class communication. They are encouraged to raise questions and to respond to one another. The instructors also have online office hours, during which they will be in their offices and available by phone, fax, and for "live" discussion in the forum.

The instructors also arrange a "Student Orientation" session, during which you will learn how to study effectively and efficiently for the Web-based courses, prior to taking their course.

To succeed in a Web-based course, students should be motivated, and self-directed. The following are the minimum required items to complete the course work at a distance successfully:

- Seriousness: Online classes aren't for goof-offs who seek easy credits. Virtual students should expect to spend at least as much time on homework as those in traditional courses.
- Self-Disciplined: It is up to students to budget their time and keep up with assignments. They must create -- and stick to -- their own schedules.
- Self-reliance: The ability to independently solve problems or research information is needed. Questions can be answered by e-mail, but that takes time.
- Careful Reading Skills: Because classroom lectures are replaced primarily by written words, students need to be careful and slow-thoughtful readers.
- Computer Skills: Students must be comfortable using computers and the Internet. That includes e-mail, Web browsing, downloading, and word processing.

Online learning enables you to extract information from different types of resources anytime, anywhere.

No one need be ashamed of what he or she does not know or how long it takes to master new information. Learning on the Web can be nonjudgmental and self-paced. Using advantages of this technology to expand learning opportunities is particularly crucial, because we live in a time when learning is becoming a necessity not a luxury.

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EDUCATION ed AT A DISTANCE

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Editor's Note: In January 2002, we published Online Teaching in an Online World: Executive Summary. It provided a breadth of results from research conducted by Curtis J. Bonk incollaboration with Jones Knowledge, Inc. This is a complementary research on training, carefully documented and illustrated with 57 graphs. Distance learning practitioners at all levels - administrator, designer, teacher, and evaluator, can learn a great deal from both of these reports. The complete reports are available at http://www.publicationshare.com/. For expert practitioners, it will either confirm or challenge the approaches you now use. For the newcomer it provides a substantial foundation based in current research as a starting point for development and implementation of e-learning.

Online Training in an Online World

Curtis J. Bonk

Executive Summary

Welcome to the second of a series of survey research reports related to the use of the Internet in teaching and learning. Whereas our initial report addressed the use of the Internet by postsecondary instructors, this one focuses on e-learning in the corporate world and other training settings.

In response to the recent explosion of online training in work-related settings, we conducted a Web-based survey during April and May of 2001 that was completed by 201 respondents. These individuals were asked about their Web-based training practices, experiences, tool preferences, instructional approaches, assessment methods, obstacles, and support structures. Among those completing this survey were corporate trainers, instructional designers, training managers, and Chief Learning Officers. The respondents represented a range of industry types that included information technology, financial services, education, manufacturing, government, consulting, military, and healthcare. Nearly all of them were either users of Web-based training or decision-makers regarding it. In addition, most were active members of training or online learning organizations.

While there was significantly greater interest in e-learning than actual commitment to it, the survey findings confirm that the Web is flourishing as a training delivery mechanism. Due to the recent emergence of this delivery method, however, more than half of the surveyed institutions outsourced aspects of their Web-based training needs. They were more likely to outsource the content and delivery system, than the implementation and evaluation of Web-based training. Respondent organizations tended to rely on blended approaches wherein Web-based training supplemented and, hopefully, enhanced face-to-face instruction (van Dam, 2002). Computer applications, technical skills, and job-related skills were the most common forms of training offered online.

Respondents noted various organizational support and cultural resistance problems that were limiting the adoption of e-learning. Barriers to adoption included perceptions of high cost, extensive instructor preparation time, limited technical support, and a general lack of bandwidth and necessary hardware. Respondents alluded to several types of online tools that could soon experience high demand including tools that fostered interactive feedback, annotations, demonstrations, assessment, and critical and creative thinking.

Whereas most e-learning surveys have explored technological infrastructure problems or have performed price and feature analyses on different types of online delivery platforms (Hall, 2000a, 2000b), this study attempted to understand some of the pedagogical tools and mechanisms that could benefit online trainers and learners. With respect to engaging online learners, terms such as relevance, feedback, goals, interactivity, and choice were deemed important to the respondents. These course characteristics were considered vital to increasing student engagement while decreasing the high rates of online attrition currently experienced by many of their organizations. Student exploration, case-based learning, and problem-based learning were instructional approaches thought to be as effective in online as in traditional environments. However, instructional approaches such as discussion, lecture, role-play, mentoring, and group collaboration were seen as less applicable to online settings. When respondents were asked about various intrinsic motivational techniques, activities such as job reflections, team projects, and guest mentoring were considered more engaging and useful online than social ice breakers, peer reviews, and displaying learner products online. Given these results, it was clear that some examples of best online practices and success stories were needed. Stories of best practices can illustrate different instructional approaches and techniques to trainers and instructional designers who currently question their applicability.

Projections for the next decade indicate that the supply and demand for Web-based training will continue to escalate. As in our earlier college instructor survey, most respondents anticipated significant increases in Web-based instruction as well as in freelance or adjunct instruction. Additional resources and guides are presently needed to support such endeavors. Respondents also tended to ask for tools that were more collaborative and interactive. Interestingly, they expressed a need to share their online tasks and ideas with each other.

Most respondent organizations sought cost efficiencies and positive return on investment from online training. For instance, they expressed interest in learning objects that could be chunked and reused within their training systems. Many of these same organizations were not completely satisfied with their online tools and associated assessment practices. In fact, most did not conduct formal evaluations of their Web-based learning courses and programs. The evaluations that did occur unfortunately were at the lower end of common evaluation frameworks, focusing on course satisfaction instead of return on investment.

Many respondents were also dissatisfied with the low course completion rates. While lack of time was selected as the chief reason for learner attrition, most institutions simply lacked incentives for online course completion. Common obstacles to Web-based learning included instructor preparation time, bandwidth, cost, and cultural support. Also contributing to the myriad of online course obstacles was the predominance of courses offered in only one language.

In addressing these problems and issues, respondent organizations incorporated various support structures for online learners and trainers. For example, many organizations tended to rely on e-mail support as well as online help and tutorials. Given that most respondents accessed Web-based training from their offices, desktop computers were also a highly strategic investment. In addition to internal support, conferences, workshops, and local experts were utilized for supporting the designers and developers of that training.

As with our earlier study of college faculty, these training and human resource professionals were interested in sharing course resources, consulting the Web for expert teaching answers, and offering their instructional services to others. While their organizations used a wide range of tools and tasks in Web-based training, they pointed to a number of key pedagogical tools that were not yet available or were just emerging. Given such needs, the coming decade should prove interesting for those developing, delivering, or evaluating Web-based training.

Despite the relative lengthiness of this survey, key questions related to online tool development, learner support, and assessment and evaluation were not addressed. Future research will also need to reveal the specific motives and rationale behind different Web-based training initiatives and decisions. For instance, clarity is needed regarding current and projected e-learning funding levels, user satisfaction with particular learner-management and courseware systems, typical ROI

calculations, the forms of online instructor training, and the incentive packages and reward structures for online course completion. In-depth studies might also ferret out e-learning differences between industry types as well as between large and more modest-sized organizations.

Key survey findings are summarized below. Greater detail regarding these results is provided in section 3 of this report.

Background of Respondents and Respondent Organizations (see 3.1)

Description of Survey Respondents

The survey was completed in April and May 2001 by 201 trainers, instructional designers, training managers, and human resource personnel.

This sample was highly aware of Web-based training issues.

In terms of Web-based training, 57 percent were both users and decision-makers, while 17 percent were users but not decision-makers and 20 percent were decision-makers but not users. When combined, 94 percent of our sample either used Web-based training or made decisions regarding it.

Only 6 percent were neither decision-makers nor users of Web-based training.

Size of Respondent Organizations

Respondents represented a range of institutional sizes. Ten percent worked at organizations of less than 30 people, 11 percent had between 31 and 100 employees, 18 percent between 101 and 500 employees, 10 percent between 501 and 1,000 employees, 27 percent between 1,001-5,000 employees, 6 percent between 5,001 to 10,000 employees, 15 percent between 10,001 and 100,000 employees, and 3 percent had more than 100,000 employees.

When categories were condensed, 21 percent of the survey respondents worked in organizations of 100 or fewer employees, 28 percent worked in organizations of between 101 and 1,000 employees, 33 percent worked in organizations employing 1,001 to 10,000 workers, and 18 percent worked in organizations of over 10,000 employees.

Whereas nearly half of the respondents were from organizations of less than 1,000 employees, only about one in four worked in organizations of more than 5,000 employees.

Type of Respondent Organizations

Many types of organizations were represented in this survey. The largest percent of respondents were from the field of education (20 percent). Other respondents worked in areas such as information technology (15 percent), financial services/insurance (13 percent), consulting or contracting (11 percent), industrial/manufacturing (10 percent), or government (7 percent) settings. A few worked in health services (5 percent), military institutions (3 percent), non-profit associations and organizations (2 percent), hospitality (2 percent), transportation (1 percent), and retail management (1 percent). Nearly ten percent were from other types of instructional situations or were not specific about the type of public or private institution they worked in.

Years of Corporate Training, Knowledge Management, or Related Experience

Most respondents in this sample had backgrounds in corporate training, knowledge management, or related areas. In fact, nearly two-thirds had six or more years of experience.

More specifically, 2 percent had less than 1 year of experience, 10 percent had 1 to 2 years of experience, 23 percent had 3 to 5 years of experience, 21 percent had 6 to10 years of experience, 31 percent had 11 to 20 years of experience, and 13 percent had more than 20 years of experience.

Respondent's Age, Gender, Job Function, and Educational Background

The age of survey respondents was also quite varied. Nearly one-fourth of the participants were under age 36, half were 36 to 50 years old, and slightly more than one-quarter were over age 50.

Fifty-two percent of the respondents were females.

Most respondents (84 percent) were in formal training or instructional design positions or had similar responsibilities. Almost 50 percent had instructional design or program development responsibilities. Nearly 30 percent were instructors or trainers, 27 percent were training managers, 20 percent were training evaluators, and 14 percent were training directors (note that respondents could select more than one category). Somewhat fewer were knowledge managers (9 percent), human resource personnel (5 percent), Chief Learning Officers (4 percent), or Chief Technology Officers (2 percent). Another fifteen percent of survey respondents were in other job functions such as technical writers, directors of e-learning, quality managers, learning technology consultants, or Chief Executive Officers.

The pool of respondents was fairly well educated. In terms of highest degree held, 3 percent had high school diplomas, 8 percent obtained some type of professional certification beyond high school, 35 percent possessed bachelor's degrees, 41 percent had master's degrees, 8 percent held advanced degrees or were ABD, and the remaining 5 percent had earned a doctoral degree.

Training in the Organization (see 3.2)

Existence of Training Department

Eighty percent of respondent organizations had a training department.

Training Aligned with Key Functions?

More than 70 percent of respondents either agreed or strongly agreed that training activities were aligned with key functions of their organization. However, nearly 20 percent disagreed with this statement and the remaining ten percent were unsure.

Methods to Deliver Training

Most respondent organizations (98 percent) still relied on conventional instructor-led training.

Nearly three-fourths of these organizations also used intranet/Internet-based delivery systems for some of its training. In addition, 68 percent employed multimedia programs for aspects of its training, 52 percent videotape, and 46 percent paper-based correspondence courses as part of their training. Seventeen percent utilized other technologies such as satellite-based systems, audiotapes, virtual reality, interactive television, conferences, and print media.

Online Training in the Organization (see 3.3)

Interest in and Commitment to Web-Based Learning

More than 70 percent of respondents agreed or strongly agreed that their organizations were committed to learning in general. Just 16 percent disagreed or strongly disagreed with that statement and another 14 percent were unsure.

Even more, 75 percent indicated that their organizations were committed to e-learning. Just 3 percent strongly disagreed and another 11 percent disagreed with that statement.

However, only about 50 percent of respondent organizations were committed to Web-based learning. More interestingly, 30 percent simply did not know if their organization was committed to Web-based learning and another 20 percent either disagreed or strongly disagreed.

Interest in Web-based learning varied by industry sector. Those industries with high interest included consulting (85 percent), financial services (84 percent), information technology (80 percent), health services (80 percent), and education (75 percent). Organizations with lower interest included industrial/manufacturing (65 percent) and government (50 percent).

Commitment to Web-based learning had a slightly different pattern. Industries with high commitment included financial services and insurance (64 percent), education (64 percent), information technology (59 percent), and consulting (59 percent). Less commitment was expressed by those in industrial/manufacturing (40 percent), government (39 percent), and health services (30 percent). Some of the industry sectors had less than 20 respondents, however.

Interest in Products that Supported Traditional Instruction or Fully Delivered Web-Based Learning

Seventy-four percent of respondents indicated that their organization was interested in Web-based products that supported instructor-led (i.e., traditional classroom-based) instruction. Only ten percent were not interested; the balance were unsure.

Slightly fewer, seventy-one percent, agreed or strongly agreed that their organization was interested in Web-based products to deliver courses entirely online.

Why Interested in Web-Based Learning

Respondents were primarily interested in Web-based learning because it increased access to learning (86 percent). Two-thirds of respondents noted that growth in employee skills, ability to track learner progress through a learning management system, and increased job performance were key reasons for their interest. Slightly more than half perceived distinct advantages of Web-based learning including the standardization of content and assessment procedures, enhanced interactivity, and learner satisfaction. Employee retention and keeping up with the competition were aspects chosen by approximately one-fourth of respondents. Other responses included cost savings, reduced travel time, greater flexibility in delivery, and the timeliness of such training.

Organizational Support for Web-Based Courses

Less than one-third of respondents felt that their organization provided enough training, resources, and support for effectively delivering Web-based courses. In fact, 54 percent disagreed, while 15 percent were unsure.

Purpose of Web-Based Learning

Most organizations were using Web-based learning as an alternative to instructor-led courses (66 percent) or as a supplement to traditional instructor-led training courses (53 percent). About one-fourth used it as a follow-up to live instruction. One in five used the Web as the sole source for learning.

Types of Online Training

The most prevalent skills taught online were computer applications and software skills (64 percent) as well as technical skills (50 percent). The next most popular type of online training concerned job-related skill development (45 percent). Communication skills, computer systems or programming skills, and management or supervisory experience were all offered at roughly 3 in 10 organizations surveyed. Around one-fourth offered online training for personal growth as well as customer service skills. They tended not to use the Web for sales or marketing skills (16 percent) or executive education (13 percent).

In-House Development of Web Training

Seventeen percent of respondent organizations did not develop any aspects of their Web-based

training internally. Another 25 percent of these organizations farmed out at least 75 percent of their Web-based training. Fifteen percent outsourced between half and 75 percent of their Web-based training efforts. At the same time, 42 percent developed more than half of their training internally. Nearly one-fourth generated all their training internally.

Different aspects of Web-based learning initiatives were developed in-house. Of those organizations developing at least some online training internally, 92 percent were generating online content, 76 percent were involved in the implementation of training, 74 percent were developing evaluation programs and procedures, and 60 percent were creating online delivery systems. These findings differed significantly across the size of respondent organization.

Numerous limitations with their current courseware systems or tools were noted (e.g., complex, unreliable, slow connections, technological limitations, boring, and lacking in interactivity).

Tools deemed superior were reliable, scalable, comprehensive, reasonably priced, intuitive, flexible, and fast.

Out-Sourced Web Training

More than half of the respondents (54 percent) indicated that their organization outsourced at least some Web-based training. Forty percent did not outsource any online training.

Nearly 70 percent of organizations were outsourcing at least part of their content development. In addition, 66 percent outsourced the online delivery system, 44 percent outsourced online implementation efforts (e.g., monitoring, instructing, supporting), and 32 percent outsourced the online evaluations.

Seventy-six percent of organizations with over 1,000 employees outsourced some of their Web-based learning efforts, compared to only 60 percent of organizations with less than 1,000 employees.

More than 35 different external vendors were mentioned for the development and delivery of Web-based instruction, but no single vendor was used by more than one-fourth of survey respondent organizations.

Online Training Assessment in the Organization (see 3.4)

Measuring the Impact of Online Training

Nearly 60 percent of survey respondents indicated that their organization failed to conduct formal evaluations of Web-based learning.

Of those that evaluated online learning, 79 employed simple assessments of student reactions (Kirkpatrick’s Level 1), 61 percent measured participant change in knowledge, skill, or attitude (Kirkpatrick’s Level 2), 47 percent assessed participant job performance improvement (Kirkpatrick’s Level 3), and 30 percent analyzed results such as the return on investment (Kirkpatrick’s Level 4).

Open-ended final comments from respondents about assessment practices indicated that many organizations had just begun to adopt online training tools and associated assessment practices. Those that did assess the impact of online training remained at the lower level of the Kirkpatrick model. In addition, time to competency and time to market were among the methods offered as alternatives to traditional ROI calculations.

Current Issues and Attitudes Related to E-Learning (see 3.5)

Course Ownership and Guidelines

In stark contrast to our earlier study of college instructors, three-fourths of the survey respondents

agreed that their organization owned the courses developed for online instruction. In fact, only 9 percent of the respondents felt that the trainer or instructor owned the online courses, while 17 percent were not sure.

Forty-seven percent of respondents agreed or strongly agreed that their organization had clear guidelines about the ownership of course materials. However, one-fourth of survey participants were not sure about the ownership policies within their organization and another 28 percent disagreed or strongly disagreed that their organization had clear guidelines.

Reusable Learning Objects

More than two-thirds of respondents worked in organizations that were interested in the use of learning or knowledge objects in online learning.

Despite the recent emergence of this field, only 14 percent of the respondents worked in organizations that were not interested in learning or knowledge objects. Another 17 percent of respondents not sure if their organization was interested in this area.

Quality of Certificates and Degrees Earned Online

Thirty-seven percent of respondents worked in organizations that valued online certificates as much as certificates earned in traditional classroom settings. However, 43 percent were not sure how their organization would react to online certificates and the remaining 20 percent worked within organizations that preferred the traditional delivery of certificate programs.

Somewhat fewer, 27 percent, worked in organizations that valued degrees earned online as much as those earned in traditional classrooms. Once again, over forty percent were unsure now their organization would react. Finally, 36 percent worked in organizations that preferred degrees obtained from traditional face-to-face instruction.

Usefulness of Web-Based Tools for Teaching and Learning (see 3.6)

Useful Online Course Tools

The survey respondents were asked to rate the degree of usefulness (i.e., low, medium, or high) for 25 e-learning tools and resources, while also indicating whether they or their organization actually used such tools. The respondents generally felt that most online course tools were highly useful.

Commercial courseware was deemed highly useful by 66 percent of respondents and was actually used by 57 percent of their organizations.

Other highly popular course tools included online database tools (60 percent rated as highly useful and 66 percent actually used), file uploading and downloading tools (59 percent deemed highly useful and 62 percent actually used), online course evaluations (55 deemed highly useful and 56 percent actually used), and online quizzes and tests (54 percent noted as highly useful and 61 percent actually used).

Tools for posting online cases or problems corresponding to course material were rated as highly useful by 39 percent of the survey respondents, while only 34 percent actually used them.

In general, the percent of respondents who viewed online course tools as highly useful was lower than the percent that actually used them. Therefore, the development of such tools may not be a high priority for software companies since it does not appear to be an area of high growth.

Growth Potential of Online Course Tools

Growth potential (i.e., the difference between tools rated as highly useful by survey respondents and the percent of those particular individuals actually using them) was highest for online course

evaluation tools (20 percent gap) and courseware tools (19 percent gap), and online quiz and testing tools (18 percent).

Less growth was predicted for software tools for posting cases, questions, and problems (14 percent), file uploading and downloading (14 percent), and online databases (12 percent).

Useful Student-Oriented Tools

Nearly all student-oriented tools were not employed as widely as respondents would have hoped. Respondent ratings of “highly useful” equaled or surpassed actual use for all tools listed. Hence, this was an area marked for potential growth.

Learner collaboration tools fared best. Tools for learners to share best practices were rated as highly useful by 60 percent of the respondents, but were actually used by only 46 percent of their organizations. Tools for learner collaboration and teamwork were rated as highly useful by 54 percent and actually used by 41 percent.

Perceptions of asynchronous discussion tools as highly useful matched their actual use at 42 percent. Real-time chat tools, however, were only deemed highly useful by 30 percent of respondent organizations and actually used by 27 percent of them.

Learner profile or general background tools were rated as highly useful by 36 percent of respondents and used by just 25 percent of their organizations.

Growth Potential of Student-Oriented Collaborative Tools

There were fairly substantive differences between perceived usefulness and actual use for student collaboration and sharing tools. Web-based learning tools with high growth potential included those that allowed learners to share best practices (29 percent) and tools for learner online collaboration and partnership (25 percent).

Modest growth was projected for tools that provided learner profiles (19 percent), real-time forums or synchronous chats (17 percent), and asynchronous discussion forums (15 percent).

Useful Instructor-Oriented Tools

All instructor-oriented tools were considered highly usable. In fact, high usefulness ratings were higher than actual use ratings for all these tools.

Online demonstration tools were viewed as highly useful by 52 percent of respondents. About 47 percent of respondent organizations actually used these tools.

Instructor feedback and annotation tools were used by only 33 percent of respondent organizations, but 48 percent deemed them highly useful.

Online critical and creative thinking activities that instructors might incorporate into online courses were perceived as highly useful by 47 percent of survey participants, but only 28 percent of their organizations actually were using them.

Tools for trainers to share tasks and activities were rated as highly useful by 45 percent of respondents, but were used by only 26 percent of them.

Trainer profile tools were deemed highly useful by just one-fourth of respondents and a similar percentage actually used them.

Growth Potential of Instructor-Oriented Collaborative Tools

A measure of potential tool growth was calculated for all tools based on differences between perceived usefulness and actual use. Of all areas surveyed here, the highest growth area was for instructor collaboration and sharing tools. Potential high growth areas included tools for trainers to

share tasks and activities (30 percent), online tools for critical and creative thinking (29 percent), instructor feedback, commenting, and annotation tools (28 percent), and online technology demonstration tools (22 percent).

Modest growth was projected for trainer profile tools (15 percent).

Useful Web-Resources for Online Training

Web resources were less geared for growth.

Search engines were used by 83 percent of the respondent organizations for instructional purposes, but only 56 percent found them highly useful.

Digital libraries and online research guides were also viewed as highly useful by 56 percent of respondents. Sixty-eight percent of them noted that their organization used them in Web-based instruction.

Web resources specific to training in one's field were deemed highly useful by 54 percent of respondents and were actually used by 58 percent of the organizations surveyed.

Unlike the high support in our previous survey of college faculty, only forty-six percent of respondents perceived article and journal links as highly useful. Still, 57 percent were actually using such a feature.

Other online resources with more modest support included online glossaries (41 percent perceived high usefulness, 40 percent actually used them), general training resources (33 percent high usefulness, 45 percent actual use), book recommendations (30 percent high usefulness, 44 percent actual use), Web link recommendations (22 percent high usefulness, 29 percent actual use), and online newsgroups (20 percent high usefulness, 30 percent actual use).

Growth Potential of Web Resources

Web resources had the lowest perceived growth potential. The only item projected for high growth related to resources specific to training in one's field (21 percent).

Modest growth was predicted for online glossaries with Web examples (17 percent).

Lower growth was predicted for general training resources (12 percent), digital libraries and online research guides (11 percent), article and journal link tools (10 percent), Web link suggestion tools (9 percent), book recommendation tools (7 percent), newsgroups (7 percent), and search engines (3 percent).

Pedagogical Practices for Corporate E-Learning (see 3.7)

Instructional Approaches

Respondents rated 12 approaches to instruction according to whether they were best supported by online or traditional environments or were equally supported by these two environments.

Respondents slightly favored online environments for exploratory or discovery learning (35 percent versus 15 percent), student-generated content (26 percent versus 18 percent), and case-based activities (18 percent versus 12 percent).

They slightly favored traditional instructional settings over online ones for problem-based learning (21 percent versus 13 percent) and modeling of the solution process (28 percent versus 12 percent). Guided learning was nearly equally supported in both settings.

Traditional environments received more support for group problem solving and collaborative tasks (42 percent versus 5 percent), Socratic questioning (44 percent versus 6 percent), role-play and simulations (49 versus 8 percent), discussion (46 versus 4 percent), coaching or mentoring (49

percent versus 5 percent), and lecturing (54 percent versus 4 percent). Still, at least half of the respondents felt that methods such as Socratic questioning and discussion would be equally supported in each type of environment.

Motivational Characteristics of Web-Based Learning

Respondents rated the importance of 13 motivational principles in Web-based learning situations. Four of these principles were rated as highly important by more than 50 percent of the respondents, including relevant and meaningful materials (88 percent), timely and responsive feedback (78 percent), goal-driven and product-oriented activities (61 percent), and personal growth (51 percent).

Motivational principles with more modest support as highly important included flexibility in activities (49 percent), interactive and collaborative activities (47 percent), a sense of variety and novelty in activities (45 percent), engaging in discussion that involves multiple participants (41 percent), and a supportive community of learners (41 percent).

Lower still, were work-related incentives (wage increases, rewards, etc.) which 31 percent viewed as highly important, a safe climate with a sense of belongingness (29 percent), and online tension, conflict, and controversy (7 percent).

Specific Motivational Techniques

Respondents also rated twelve specific motivational techniques that they found highly engaging and useful. The two techniques receiving more than 50 percent support from respondents as highly engaging and useful were cases or job reflections (59 percent) and brainstorming or idea sharing (53 percent).

Group or team projects were considered highly engaging and useful by 41 percent of respondents, while electronic guests or mentors received slightly less support (34 percent) as highly engaging and useful.

The remaining eight techniques received less than one-third support as highly engaging and useful. These included students leading discussion (32 percent), online symposia and expert panels (29 percent), online voting or polling activities (29 percent), e-mail pals and peer review (28 percent), role-play and debates (26 percent), article discussions and online critiques (26 percent), displaying student final products online (23 percent), and ice breakers and social tasks (17 percent).

Future Online Teaching Situation (see 3.8)

Predicted Online Teaching Situation

Of those who anticipated teaching or training during the next decade, online training is predicted to significantly increase. While more than half of the respondents (58 percent) viewed it as taking up 1-25 percent of their training time in the next year, 66 percent felt that it will require at least 26-50 percent of their time in just two years. Within 5 years, nearly 53 percent perceived that Web-based learning would command at least 50 percent of their training and instructional load. Within ten years, 67 percent of respondents felt that their instructional load would be at least 50 percent online.

By the end of the decade nearly everyone anticipated that they would be training online; at least to some degree.

Females expected to devote more instructional time to Web-based learning during the next decade than males; the differences were significant during the next two years.

Freelance Instruction

In parallel to the college instructor survey, only 19 percent of the respondents had been freelance or

adjunct instructors on the Web in the past.

Over 80 percent, however, were interested in teaching as freelance or adjunct online instructors in the next five years. Such findings indicate that services offered by freelance instructors may explode during the coming decade.

Obstacles Related to Web-Based Learning (see 3.9)

Obstacles to Web-Based Learning

The primary cultural or organizational obstacle to Web-based learning, according to the respondents, was the perception of high cost (44 percent).

Other serious cultural/organizational inhibitors to Web-based teaching and learning included instructor time to prepare courses (36 percent), resistance to technology (33 percent), the lack of organizational support (32), difficulty measuring ROI (27 percent), and a lack of training on how to use the Web (25 percent).

One in five survey respondents pointed to a lack of interest as a barrier.

Factors less problematic than expected included lack of time to learn to use the Web (14 percent) and time required of instructors to deliver online courses (10 percent).

Forty-one percent of respondents identified bandwidth as the major technological obstacle to Web-based learning in their organization.

Other technological obstacles included a lack of support for technical problems and assistance with courseware development (36 percent), firewalls (32 percent), a lack of hardware (30 percent), a lack of standards (24 percent), a shortage of equipment and software to display the Web (20 percent), a lack of interactivity (19 percent), and outdated or inadequate software (18 percent).

Open-ended comments from survey participants were fairly blunt about the cultural and organizational factors limiting the adoption of the Web for training. Some respondents mentioned problems and issues such as a lack of vision, Web access and reliability, lack of time, inadequate funding, generation gaps, system limitations, and administrative bias and ignorance. Overall, survey respondents tended to focus on cultural and organizational inhibitors such as administrative vision and leadership rather than on technological concerns.

Supports Related to Web-Based Learning (see 3.10)

Support for Course Designers and Developers

Designers and developers of Web-based courses were provided with a variety of training options. Conferences (33 percent) and workshops (31 percent) were the most popular. Slightly fewer respondent organizations provided access to experts or consultants (29 percent). Approximately one-fourth accessed vendors for training. Another fourth utilized Web-based courses for designer and developer training.

Only 22 percent of respondents were aware of Web-based training leading to certification of those designing or developing Web-based courses. Sixty-three percent of respondents indicated that online training did not lead to such certification, while another 15 percent simply did not know. A few relied on special university classes, internal specialists, or self-study for professional training.

Support for Learners

Three-fourths of respondents indicated that learners in their organizations accessed Web-based courses and content through their office computers. Slightly over 20 percent of these organizations relied on employee access from home. Only 2 percent relied on road access, and this related primarily to sales personnel.

The primary resources organizations provided to support online learners were e-mail (54 percent) and desktop workstations (49 percent). The next most frequent forms of learner online support were online help (38 percent) and online tutorials (33 percent). Both laptop computers and computer labs were resources provided by about 30 percent of the organizations in this survey. Fifteen percent of organizations offered 24-hour phone support. Another 15 percent offered no support whatsoever.

Number of Languages for Online Training

Thirty-five percent of respondents were aware of their organizations' efforts to develop Web courses in multiple languages. Fifty-three percent of respondents worked at organizations that were not interested or involved in such language support. The remaining twelve percent simply could not answer this question.

Of the 68 respondents working in organizations attempting to address this issue, nearly 40 percent were still limited to one language format, 13 percent offered courses in 2 different languages, 4 percent in 3 languages, 15 percent in 4-6 languages, 6 percent in 7-10 languages, and nearly 5 percent in more than 10 languages. It was assumed that the eighteen percent who noted that the question did not apply were in the initial planning or development stages regarding this aspect of e-learning.

Organizations of over 1,000 employees were significantly more likely to be developing multiple language Web-based courses than smaller organizations.

Completion of Web-Based Courses

Reported course completion rates were fairly dismal. First of all, 55 percent of survey respondents either did not even know their completion rates or simply did not track them.

Twenty-two percent of respondents worked in organizations where fewer than one-fourth of all students completed their Web-based courses. Another 14 percent experienced slightly higher success with 26-50 percent of learners completing their online courses. Sixteen percent noted that 50-69 percent of their students successfully completed their online courses.

On the other hand, nearly half of the respondents indicated that at least 70 percent of learners completed their online courses. Only two percent, however, experienced 100 percent completion rates.

Both lack of time (46 percent) and lack of incentives (29 percent) were key reasons cited as to why learners dropped online courses. While poorly designed courses were mentioned by 17 percent of respondents, only 2 percent indicated that costs inhibited course completion.

There were numerous other reasons cited for the high attrition rates including employee turnover, scheduling conflicts, lack of relevancy, dropped connections, procrastination, supervisor expectations, and learners acquiring what they needed to know and then dropping the course.

Incentives for Completion

Part of the online course completion problem appeared attributable to the lack of incentives. In fact, 56 percent of the respondents pointed out that their organization provided no incentives, and of those that did, the most frequent incentive was increased job responsibility (18 percent).

Other types of incentives included public recognition (15 percent), credits toward a degree or certification (11 percent), increased job security (9 percent), additional salary (8 percent), and promotion (7 percent).

In open-ended responses, a couple of survey participants alluded to the importance of bonuses and other financial incentives.

Online Communities, Services, and Resources Needed (see 3.11)

Online Communities for Resource Sharing

Respondents were asked about tools and resources that would interest them in a free community for the sharing of course resources and instructional ideas. The most popular features of such a community were online articles and newsletters (76 percent), professional links and resources (73 percent), expert advice (70 percent), Web resource sharing tools (70 percent), and courses, catalogs, and products (66 percent).

Several instruction-oriented features were also rated highly. For instance, respondents wanted answers to teaching problems (65 percent), tools for sharing stories of instructional experiences (59 percent), opportunities to share pedagogical ideas (55 percent), and prerated Web resources intended for corporate trainers (52 percent).

Other features with modest support included online trainer profiles (49 percent), online discussion and chat tool options (45 percent), and online book reviews (43 percent).

Useful Web-Based Services, Resources, and Information

There was a myriad of Web-based services, resources, and information that respondents would like to have access to as a trainer or instructor.

The top rated online service was online course design and development help (including guides, courses, workshops, newsletters, tutorials, and conferences). More than 80 percent of respondents acknowledged the importance of such resources. In addition, 72 percent wanted online teaching help (e.g., courses, guides, tutorials, workshops, conferences, etc.), while 63 percent indicated that online mentoring and tutoring services would be valuable.

Other popular requests included various technology tools and resources. For instance, most respondents asked for Web-based survey and evaluation resources (75 percent), Web-based simulations and experiments (74 percent), and downloadable trial and demonstration software (72 percent).

Other Web-based resources that respondents were interested in included online access to job opportunities (51 percent), courseware company listings (54 percent), bookstores (54 percent), conference information (57 percent), freelance teaching possibilities (61 percent), online course listings (63 percent), workshops and institutes (65 percent), and library and research resources (67 percent).

Given that all these resources received more than 50 percent high support from the respondents, support portals and information resources appear to be ripe for growth. Clearly, trainers want fast and efficient access to information, resources, and instructional technologies.

Final Comments from Respondents (see 3.12)

Final Comments from Respondents

Several respondents noted a need for upper management support and vision. Others simply wanted better instructional design support. Still others mentioned the need for more interactive and effective Web-based learning tools.

There was high interest in the findings of this survey. In fact, eighty-five percent of respondents wanted a copy of the final report.

There were no problems with the survey other than a few complaints about the overall length.

Recommendations Based on Findings (see 4.0)

Based on these findings, fifteen key recommendations were generated for trainers, training managers, tool developers, and researchers. These recommendations are listed below according to the order in which they are discussed in Part III of this survey report. In addition, a few future trends were noted.

Focused Research (see Section 3.1): Respondents to this survey represented a wide range of organizations, job functions, and experiences. Future research might target particular industries, sizes of organizations, or job functions. Such research will help with product marketing and tool development efforts.

Longitudinal Reports (see Section 3.2 and 3.3): As with other reports, the data reported here clearly showed that the Web is emerging as one of the preferred methods of employee training. Longitudinal research might explore these trends over the coming years or decades. For instance, such research might track attitudes about organizational support structures as well as employee attitudes and achievement related to these new forms of delivering training. It might also longitudinally explore differences between organizational interest and commitment in Web-based learning, as well as the types of online delivery methods utilized and promoted. Additional research might reveal where and when blended approaches are preferred to either fully online approaches or conventional face-to-face training. Other possible longitudinal variables include the reasons various organizations are interested in Web-based training, the types of training offered, and the chief reasons behind outsourcing the development and delivery of Web-based content.

Evaluation and Assessment (see Section 3.4): Alternative online assessment measures need to be developed that address employee skills and competencies. Given the findings of this survey, organizations should evaluate the completion rates of their courses as well as the motivational characteristics embedded within them. In addition, time to competency measures might be added to, or in some cases, replace traditional ROI measures. Along with changes in assessment practices, there is a need for comprehensive documents that survey the forms of online assessment and evaluation commonly used. Such documents might also provide case examples of success stories and potential problems in assessment.

Use of Learning Objects (see Section 3.5 and 3.11): Organizations should consider how the use of learning objects in instruction relates to their strategic planning, including their knowledge management efforts. Such planning documents are vital since the use of reusable learning objects in online instruction will proliferate during the coming decade. Of course, the growth of this field will depend on the development of effective standards for shareable courseware. Decisions must be made regarding the size and type of objects shared, systems and tools used for sharing, and the ownership and use of learning objects.

Online Learning Policies and Procedures (see Section 3.5): Most organizations still need to develop strategic plans related to e-learning. They might develop guidelines as to acceptable levels of student course completion, skill retention, employee satisfaction, and return on investment. In some instances, they will need to develop clear policies regarding the ownership of online course materials and applicable royalties. Organizations with significant training concerns might adopt policies related to instructors and other employees who provide freelance online instruction for other institutions or organizations. They might also attempt to clearly articulate why certain courseware tools, policies, and expectations have been adopted related to Web-based instruction.

High Growth Tool Development Efforts (see Sections 3.6 and 3.7): Few online software tools address the diversity of instructional and learning needs mentioned by participants of this survey. High growth areas revealed in this survey included tools for online course evaluation, instructor demonstrations, student task collaboration as well as story telling, trainer task collaboration, learner critical and creative thinking, instructor feedback and annotations, and Web resources specific to one's field. As both this and our previous survey report indicated, there is a dearth of pedagogically interactive and motivating activities within Web-based learning environments. The first organization to develop a suite of pedagogical tools or templates addressing motivation,

teamwork, and critical or creative thinking (e.g., tools for debate, role-play, brainstorming, timeline, etc.) will add significant value to the present state of learning management systems and instructional courseware. Finally, as online learning globally extends around the world, tools for language support will be increasingly requested and required.

Tool Development Partnerships (see Sections 3.6 and 3.7): Courseware companies might seek partnerships for tool development and testing with universities and institutes that have well-established learning technology, information science, and instructional design departments. In serving as a testbed for emerging tools, technology centers at those universities and institutes can research and showcase product innovations. They might also spearhead significant research grant proposals and help form institutional consortia. With numerous technology, content, and service providers, partnerships among firms and universities can bridge knowledge gaps and provide comprehensive as well as competitive solutions.

Training the Trainer (see Section 3.6, 3.7, 3.8, and 3.11): Corporations and other learning organizations need to consider not just the learners but, if facilitators, mentors, or synchronous instructors are utilized, the trainers of those learners. It will be difficult to train in the online world without a new skill set. External supports such as Web resources, online “Train the Trainer” courses and institutes, asynchronous discussion forums and communities, online mentoring, and noted experts and consultants can offer instructional assistance. Internally, intranets can provide rich training resources and alternative avenues of such support. In effect, instructional design support and guidelines can help reduce the tension felt by those teaching online for the first time. Of course, adequate time to learn the new systems and tools is vital. While there are masses of available training resources, the use of Web-based training courses and resources is a growing area for e-learning service companies.

Freelance Instructors and Designers (see Section 3.8 and 3.11): Our survey respondents predicted fast growth for freelance instruction. How their instruction, training, and consulting wares are bartered online remains an open issue, however. Already one can list e-learning needs using “request for proposal” forms from THINQ as well as hire experts from an array of disciplines listed online at Hungry Minds University. Other innovative organizations might create tools or systems that foster instructor exchange programs, trainer-to-trainer online mentoring, trainer online job-sharing, instructional resource exchanges, and instructor communities in the area of e-learning. Expert pools and knowledge exchange programs might be common in the near future not only for corporate trainers and instructors but instructional designers as well.

Organizational Promotion (see Sections 3.09 and 3.10): Employees need to be aware of their online learning options. Marketing new courses with testimonials and up-to-date information will help convince people to take the online course. There should also be incentives for trainers, instructors, and instructional designers for high quality course design and delivery.

Organizational Support (see Sections 3.09 and 3.10): An organization must support a range of people within its e-learning initiatives. For instance, online learners need adequate technology access and organizational policies that help them to complete their online course requirements. Instructional designers new to e-learning require training, system support, and perhaps even certification. At the same time, online trainers need new skills as well as access to examples of best pedagogical practices for synchronous and asynchronous delivery systems. Finally, training evaluators need access to data from e-learning courses and events. All these e-learning stakeholders and participants demand attention and support for e-learning success.

Information Portals (see Section 3.11): The survey uncovered a need for online resources such as newsletters, information on training institutes, course catalogs, library resources, survey and evaluation tools, and course design guidelines for online training and instruction. As this area emerges, there is a pressing need to make sense of the available courses, course platforms or learner-management systems, Web-based delivery tools, and online resources. While a number of e-learning information portals and reports are emerging, there remain many areas for development, including the documentation of the companies in this area, the sharing of best practices and online documents, and the generation of online trainer ratings.

Online Communities (see Section 3.11): The survey results also exposed a need for an online community of instructors and instructional designers. Trainers and instructors want expert advice, answers to teaching problems, stories of online experiences, and mentoring services. While primitive forms of such communities exist, none address all these needs.

Access to Informed Research (see Section 3.1-3.12): Studies of Web-based learning in training settings are not as readily available as reports from higher education (Bonk & Wisher, 2000). However, summary reports from higher education, the military, and non-profit institutes can inform people engaged in the development of online training in corporate settings. Corporations and training organizations might also sponsor research and white papers in areas where gaps exist in the literature. Such research might also target perceived e-learning obstacles, assessment practices, or adult motivation to complete online courses. Training departments might partner with universities, consultants, or software development companies in these efforts. Where possible, the results of such research should be shared within the e-learning community.

Other Online Learning Reports (see Section 3.12): Other than perhaps Brandon-Hall.com and the Masie Center, few firms provide consistent and comprehensive access to e-learning reports and related resources. E-learning reports and white papers can help organizations understand complex terminology, provide vendor guidance, and summarize research and development efforts. The type of tools and content available for Web-based instruction can be confusing. Additional assistance in this area would be welcome.

Future Trends. There are many exciting as well as challenging directions for online training in this online world. While accurate predictions of next steps are difficult, a dozen recently popular trends and topics are briefly discussed at the end of this report including mobile learning, virtual universities, learning objects, electronic books, online standards, knowledge management, online mentoring, and intelligent tutors.

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Editor's Note: This paper distills research on distance learning for students from a variety of cultures, age groups, learning styles, and backgrounds. It recognizes the role of assessment, instructional design, and interactivity to provide learning environments that support success. "Cultural orientations for heterogenous populations may be evidenced by conflicts in values, interpersonal interactions, communication patterns, time orientation and scheduling, rules of activity and engagement, cognitive processes, and processes of problem solving . . . Consideration of learner orientations can inform the designer of unique approaches to learning that may better support multiple cultures and facilitate successful completion of a course. The findings apply to learning in the workplace and to academic learning.

Web-based Learning Design: Planning for Diversity

Patricia McGee

Abstract. The increasingly prevalence of distance learning in the work and learning place requires attention to assumptions about Web-based learning environments and how they support a variety of learners. Fluent technological skills do not insure success in online learning. This paper examines issues of culture and learning orientation as they may relate to approaches to design.

###

The distinction between workplace training and university learning is beginning to blur (Canter, 2000; Potashnik & Capper, 1998). Increasingly businesses are pressed to offer training at advanced levels in what may soon replace or supplant degrees offered at universities. The demand for just-in-time [1] rather than just-in-case [2] on the job training requires flexible scheduling and self-paced courses that meet the needs of individual learners (Fjortoft, 1995) at reasonable costs (Aldrich, 2001). The trend toward computer-based training (CBT) via multimedia and distance learning in the business world is mirrored in higher education (Pasquinelli, 1998). A study conducted by the National Center for Education Statistics (1999) indicates that almost half of all higher education institutions offer distance-learning courses. E-learning is an increasingly popular solution to training needs in military and corporate workplaces (Aldrich, 2001; NCES, 1999; Salopek, 1998) where learners do not want to take time off from work to complete a degree (Campbell, 2001; Rivera & Kostopolous, 2001) and are better supported by distributed education [3] (Ross & Powell, 1990) as industry and higher education realize the need for providing lifelong learning opportunities (Gartner Group, 2001). As this trends appears to be accelerating and distance learning technology rapidly evolves, the transfer of traditional training and development to a digital medium becomes a challenge in that assumptions about teaching and learning in a traditional classroom do not hold true in a virtual one. Anytime anywhere learning does not come without transformation on the part of the institution, the instructional designer, the instructor, and the student.

The proliferation of distance learning programs might suggest that transfer of content and instruction from a face-to-face to a virtual environment is a seamless process. Those who have designed, taken classes, or taught in both environments realize that this is not the case (Diaz &

Cartnel, 1999). Whatever the motivations for offering online learning, student success is the desired outcome. However, attrition rates remain higher than in campus-based courses (Phipps & Merisotis, 1999;Kelman, 1997; Naidu, 1994; Garland, 1993), and tend to be higher for first-time distance learners (Morgan, 2000). In those cases where attrition rates are low, explanations are suspect because there is little evidence that success in a distance-learning course is nothing more than a matter of learner characteristics. Even for the experienced distance learner there is no guarantee that the context, interactions, or conceptualization of content will resemble previous experiences. Most distance learning programs attempt to provide services that support the distance learner. These include embedded study strategies (Morgan, Dingsdag, & Saenger, 1998), prior knowledge assessments (Portier & Wagemans, 1995), print and electronic resources for information retrieval and problem solving (Oliver, 1999), tutorials, and advising services (Wright, 1991). A common pre-course service is a self-assessment tool that either allows the student to measure his or her preparedness for taking a distance-learning course or serves as an anticipatory set [4] by intimating the nature of a distance-learning course. Such self-assessment tools are typically in the form of a 10-15 question survey in which the respondent answers ‘yes’ or ‘no’ to a series of learner behaviors attributes or competencies such as those identified by Rowntree (1995): computer skills, literacy/discussion skills, time management skills, and interactive skills. Some self-assessment tools include a sum score that indicates whether or not the learner will be successful in the course. These types of self-assessment instruments assume that the learner will (a) complete the survey, (b) reflect upon and honestly respond to the queries, and (c) take in consideration the analysis when determining to take a course.

Most distance-learning providers do not use self-assessment data to screen for course registration. Evidently it is assumed that through completing the survey the student will determine whether or not they will be successful and, if they do not meet the criteria for success, it is assumed they will not enroll in a course. Such an approach is grounded in the notion that only those with certain attributes will or should take distance-learning courses, a faulty assumption that is exclusive and discriminatory. More importantly, few contingencies or supports exist that can aid a potential distance learner in acquiring skills or knowledge necessary to succeed in an electronic learning environment. Without these supports novice distance learners may be at risk of failure (Dille & Mezack, 1991). Additionally, there is no evidence that accommodations for a range of abilities, skill levels, or learning styles are part of distance learning course design. It is a one-size fits all approach assuming that distance learners are a homogenous group. Yet the notion of distance learner as “static” rather than dynamic is increasingly questioned and believed to be invalid (Thompson, 1998; Holmberg, 1995).

Purpose

The purpose of this paper is to examine aspects of distance learning that are often overlooked in the design and development of Web-based learning environments as these relate to the learner. The ideas presented here draw from the following set of assumptions. First, there is no evidence that self-assessment tools are correlated with distance learning success. Second, although there may be specific characteristics that are correlated with success in distance learning, all learners should learn in environments that support their needs. Third, in order to learn, one must be actively engaged in the learner process. Fourth, there are key concepts that are relevant to all distance learners. It is the author’s premise that the more prepared and informed a learner is about the distance learning experience the more likely they are to complete a course and be more successful.

The narrowly defined attributes of the successful distance learner suggests that there is a need for mechanisms that will do more than identify the areas in which the potential learner needs to improve or change. As true of preparing to use tools and resources of any learning environment, users should be aware of the context of Web-based learning. In this way, when learners make practical decisions and choices requiring higher order thinking skills, meta-cognition, and self-analysis, they will be best supported for academic success.

A further consideration must be given to the increasingly similar nature of workplace and campus-initiated learning, particularly as distance learning becomes more commonplace in both

contexts.

Although learner motivations vary between work-situated training and university learning, learner needs must be considered when designing instruction. The literature reviewed in this section includes several ways of looking at the college-age learner: learning differences, Web design and culture, and the Net generation.

Learner Differences

Models of distance learning indicate that the content to be delivered and the learning outcomes should in part determine the delivery medium. We know that some forms of distance learning are designed with limited peer-instructor or peer-interface interaction. Computer-based training (CBT) typically only provides multimedia and interface interaction. Limited forms of interaction, especially in CBT, may not support all learning needs. Instruction in general and distance learning in particular should start with an understanding of the population to be served (Granger & Benke, 1998). The trend in online learning design has been to develop a static interface that is developed by an instructional designer or a course instructor for a homogenous population. There is a growing body of evidence that indicates a need for course and interface design that addresses individual learner characteristics to provide a more learner-centered experience (Thompson, 1998).

Adaptive learning intends to address the needs of a wide range of learning needs across a variety of content areas (Jones, Greer, Mandicah, du Boulay, & Goodyear, 1992). Much development in adaptive learning has been for intelligent learning systems that are designed to transfer knowledge from the computer to the learner (du Boulay & Goodyear, 1992; McCalla, 1992). Increasingly there is a shift away from knowledge transmission to knowledge constructions (Derry, 1992; Jones, Greer, Mandicah, du Boulay, & Goodyear, 1992), and requiring support for cognitive processes (Woolf, 1992). In this approach, the computer guides the learner toward understanding, soliciting metacognitive reflection about what they know and understand. The system then can more authentically respond to the unique and individual needs of the learner (Laurillard, 1992).

Bruner (1960) believes that culture mediates a learner's cognitive development as represented by three modes through which knowledge is acquired: enactive, iconic, and symbolic. In the enactive representation, an individual learns by doing and by recalling past events. Iconic representations are internally constructed through visualized and other sensory organizations. Symbolic representations are manifested through languages, both verbal and numerical. The learner's social and cultural context, according to Bruner (1986, 1990), influences how, when, and what learning becomes knowledge. Cultural influences, however, are not necessarily conscious to the individual. Since an instructional designer's knowledge of enactive, iconic, and symbolic representations may differ from that of the intended learner, Bruner recommends that all instruction begin with the *learner's* experiences and contexts.

In many learning environments, the designer of instruction enters into curriculum development with assumptions and beliefs that may be, consciously or unconsciously, at odds with the diversity of targeted learners. Such incompatibilities may sabotage attempts to adapt learning activities in that cultural predispositions may be overlooked. Although not an issue in a homogenous learning environment, cultural orientations for heterogeneous populations may be evidenced by conflicts in values, interpersonal interactions, communication patterns, time orientation and scheduling, rules of activity and engagement, cognitive processes, and processes of problem solving (Boggs, Watson-Gegeo, & McMillen, 1985; Kochman, 1981; Shade, 1981, 1989). Consideration of learner orientations can inform the designer of unique approaches to learning that may better support multiple cultures and facilitate successful completion of a course (Coggins, 1988).

Learner Orientations

There is much literature that clearly indicates that learning is best facilitated when individual needs of the learner are being met, but, as noted by Carrier and Jonassen (1988), there is a great deal of variance in how differences are described. The definitive common element among the learner

characteristic literature is that working at one's own pace supports a variety of needs. If instructional designers attempt to design computer-based training (CBT) to address specific learning they may be quickly overwhelmed and under-prepared to deal with the extent of differences addressed in learning psychology, as illustrated in Table 1.

Table 1

Learner Characteristics Typologies (Carrier & Jonassen, 1988, p. 205)

Difference Variable	Measurement
Aptitude	Intelligence Achievement, Academic Performance Criterion-Reference
Prior Knowledge	Pre-tests Word Association Cognitive Mapping
Cognitive Styles	Field Dependence/Independence Reflectivity/Impulsivity Breadth of Categorizing Scanning/Focusing Leveling/Sharpening of Memories Visual/Haptic Perceptual Style Tolerance for Unrealistic Experiences Cognitive Complexity Serialistic/Holistic Style Cognitive Style Preference
Personality Variable	Motivation Locus on Control Anxiety Introversion/Extraversion Neuroticism/Extraversion Risk Taking

Carrier and Jonassen recommend identifying a general set of learner characteristics among a target population and then base the design on the most relevant characteristics for the intended learning objectives. For example, if the objective is learning a sequential procedural skill, presentation of steps in appropriate modes as indicated by cognitive style (visual, auditory, text) may be more relevant that providing a context that allows the learner to construct their own autonomously derived knowledge as indicated more specifically by motivation type. Consideration of learner orientations becomes critical in a Web-based learning environment in which the learner works autonomously and independently of others (Charp, 1994). Whether instructor led or computer-based, the learning environments must adapt to the unique needs of the individual learner.

Web Design and Culture

One common trait that all people share is culture. To illustrate the complexity and nature of creating adaptive learning for a generalized population, this paper focuses on the needs of the second fastest growing ethnic/racial group in the US, the Hispanic/Latino population which grew 40% from 1990 to 2000, increasing from 9.0 to 11.5 percent of the US population (US Census, 2000). This group is more likely than any other group to have limited access to technology outside of work or university resources. A recent report on Americans' access to technology tools finds that Anglos (50.3%) continue to be the most likely to use the Internet, followed by Asian American/Pacific Islanders (49.4%), African-Americans (29.3%), and Hispanics (23.7%) (Becht, Taglang, & Wilhelm,1999). Hence, there is less likelihood that Hispanic/Latinos come to the workplace or university with the technology skills and understandings, which would predict their success in distance learning.

Morgan (1994) recommends that a distance-learning course should provide connections among the learner's prior experiences that relate to course content. This not only includes conceptual knowledge but also a consideration of the entering cultural beliefs and entry level skills which may shape and influences meaning and ability to connect prior learning and new learning.

The linguistically and culturally diverse population of the Hispanic/Latino culture is often at odds with the typically Westernized approach to university teaching and learning which focuses on knowledge transmission by an expert rather than the culturally preferred active knowledge construction. Therefore a Web-based course, design in the didactic, instructor-driven tradition may handicap some populations' adaptation to the online learning experience.

The body of knowledge about cultural orientations is well substantiated. However, how cultural elements and characteristics are interpreted and manifested in Web environments is still unclear. Marcus and Gould (2001) analyzed international Web sites using Hofstede's cross-cultural theory (1997) in an attempt to identify cultural aspects of user-interface. Hofstede identified five cultural dimensions which Marcus and Gould believe can serve as a guide to Web designers. As an initial attempt to consider the influences of Hispanic/Latino, index scores from the three cultures most closely identified with the Hispanic/Latino culture are summarized (see Table 2, Culture Indexes by Country). It is important to keep in mind that Hofstede's rankings indicate that there is no universal consensus among cultural inclinations. Cultural influences in the US are even more multi-faceted. It is not possible to reflect the influence of American culture in the analysis that follows but it represents an attempt to consider design elements that more accurately reflect cultural traits as derived from cultural heritage.

Table 2

Cultural Indexes by Country

	Guatemala		Costa Rico		Mexico		US	
(n=53)	Score	Rank	Score	Rank	Score	Rank	Score	Rank
Power-distance (PD)	95	2	35	43	81	5	40	38
Collectivism vs. individualism (IDV)	6	53	15	46	30	32	91	1
Femininity vs. masculinity (MAS)	37	43	21	48/49	69	6	62	15
Uncertainty avoidance (UA)	101	3	86	10	82	18	46	43
Long vs. short term orientation	unavailable		unavailable		unavailable		29	17

The five cultural dimensions identified by Hofstede and analyzed in Web design by Marcus and Gould (2000) are Power Distance, Collectivist/Individualist, Masculine/Feminine, Uncertainty Avoidance, and Time Orientation. Although the countries depicted in Table 1 vary in their cultural predispositions, we can assume that of the three, Mexico is the country of origin for the greatest population of Hispanic/Latino in the US. Therefore, in the summary below, Marcus and Gould's Web design recommendations come from Mexico indexes.

Power Distance (PD). "The extent to which less powerful members expect and accept unequal power distribution within a culture" (Marcus & Gould, 2001, p. 5). Cultures with high PD have more centralized power structures, disparate salary rewards, acceptance of inequities, and centralized authority. Low PD cultures have less hierarchical difference in authority, more equitable salaries, and equity is desirable. Interface implications for a high PD country such as Mexico include: structured and expert information presentation, strong use of cultural values and corresponding symbols, emphasis on leader and expert rather than user, focus on security and restricted access, and information access determined by social role.

Collectivism vs. Individualism. This index refers to the degree to which an individual relates to society or values their own achievement and status In general members of collectivist cultures are

more intrinsically motivated. (see Table 3)

Table 3

Collectivist and Individualistic Indexes

Collectivist	Individualistic
value society at large over individual needs or preferences	value personal achievement and goals over that of the group
high level of national identify and loyalty	protection of individual rights and opinions; limited power of government over economy
training and skill development are valued	freedom of press & expression
emphasize socio-political objectives depicted through slogans and media messages	support freedom and pursuit of self-actualization
group achievement is more important than that of the individual	motivation is self-situated; materialism indicates success
honor and respect of elders and experienced leaders	youth and change are valued
privacy of personal information that may be at odds with that of society at large	personal information is made public.
focus on time-honored traditions	value of new rather than tradition
importance of relationships as an indicator of social morality	importance of truth as an indicator of social morality

Implications for Web design for collectivist societies include: minimal emphasis on individual achievement, success manifested in terms of socio-political ideals, nationalistic slogans and gross generalizations, authority and experience respected and valued, relationships are determinant of moral actions, and personal information is kept private.

Masculinity vs. Femininity (MAS). Hofstede generalizes about gender roles in societies, acknowledging that roles may vary in cultures that have similar MAS indicators. In general, feminine cultures tend to allow cross-gender behaviors while masculine cultures are more likely to maintain strictly defined gender roles. Traditional masculine cultures value wealth, challenge, promotion, and recognition of achievements. Feminine cultures value good relations with co-workers, pleasant and congenial home and workplace, and job security. Marcus and Gould suggest the following interface implications for high feminine cultures: interchangeable roles, cooperation and collaboration, and aesthetic expression of values.

Uncertainty Avoidance (UA). “Cultures vary in their avoidance of uncertainty, creating different rituals and having different values regarding formality, punctuality, legal-religious requirements, and tolerance for ambiguity” (Marcus & Gould, 2000, p. 20). High UA cultures: tend to have higher rates of suicide, accidents, additive disorders and prisoners; are more tactical than strategic in business, expecting long-term commitments from employees; have a more expressive populace that have expectations of structure and predictable rules and norms; see teachers are seen as experts and authorities to be respected; and, see what is out of the norm as deviant and unacceptable. Cultures with low UA: have higher intakes of caffeine and more psychosis; business cultures are more informal and strategic; appear easy-going although the general population is not overly emotive; accept that teachers may not know all the answers and learning is more open-ended; and see out of the normal phenomenon as a curiosity. Marcus and Gould suggest that Web design for

high UA should consist of: simple, straight forward design with minimal choices and concise information, intimation of consequences of actions before user makes decisions, clear and unambiguous navigation, “mental models and help systems that help users from becoming lost” (p. 20), and consistent and repetitive visual cues.

Long versus Short-Term Time Orientation (LTO). Hofstede found that countries with long-term Time Orientation believe that stability requires hierarchical relations, view the family as the model for all organizations with elders and males having most authority, believe that virtuosity does not result in equitable treatment, and see that virtuosity means working hard to improve oneself, at least in the workplace. Short-term Time Orientation cultures: emphasize the individual and equitable relationships, personal fulfillment through self-actualization. Although there is not data available for Mexico for this index, there is evidence that the orientation is long-term (Hall, 1989).

Although Marcus and Gould’s analysis is limited in its scope, it does reveals inherently different ways of looking at the world as reflected in culturally situated Web sites. Such perspectives may operate at subconscious levels in the instructional designers as they create learning experiences for Web-based learning environments. Consideration of these unapparent preferences may reduce cognitive load and stress for the learner, thereby contributing to a positive course outcome.

Cultural Learning Style

Another area of research that can inform the design of Web-based learning environments is that of learning styles. Consideration of learning preferences speaks to the issue of adapting instruction to the learner, a commonplace event in traditional instruction. Adaptive learning in Web-based environments is more challenging because the mediating technology controls and limits the type and amount of information known about a learner and the speed with which interaction occurs. Also, integrating learner choice and path [5] requires more development time and energy. However, an adaptive approach may result in lower attrition rates and higher levels of success. Although the concept of learning preference is used to define a wide range of typologies and theories, most theories fall into one of the following groups: learning preference, learning strategy, learning style, cognitive strategy, or cognitive style (McLoughlin, 1999).

It is important to note that within a culture, individuals have different styles so using one approach, however culturally relevant it may be, is not necessarily appropriate or effective for an entire group. One solution to the challenge of diversity is to provide multiple paths that learners may take, each of which is designed to support a specific learning preference. The content should remain consistent across the site but the interface through which the learner interacts can be designed to complement learning preference.

The research on learning preference by culture in Web-based learning environments is limited but does reflect some of the tenets suggested by Hofstede and Marcus and Gould. Sanchez (1996) examined US adult Hispanic learning styles and subsequent implications for Web-based learning. She examined motivation maintenance level, task engagement level, and cognitive processing level of 240 adult learners. She found that Hispanic learners preferred evaluative feedback, active participation, collaboration, and concrete and practical material. Learners tended: to retain facts well, use elaborative processing, have a positive attitude about learning, exhibit self-discipline and diligence, attend closely to tasks at hand, use “imagery, verbal elaboration, comprehension monitoring and reasoning” (p.58), identify the main idea, apply effective test-taking strategies and reflect on accuracy of information. The Hispanic learners preferred active experimentation and tended to use judgment (thinking of feeling) when interacting with others. Herz and Merz (1998) found that face-to-face simulation supports Kolb’s concept of active experimentation, a learning preference identified by Sanchez and Gunawardena (1998). Sanchez and Gunawardena (1998) make the following recommendations for distance learning for Hispanic adults, cautioning that they are not intended to perpetuate stereotypes or disallow for factors that might vary cultural traits but rather as a strategy to consider different options in course design:

- Provide a variety of instructional strategies that can be supported through a variety of media, allowing students to chose among activities that have one objective.

- Provide consistent, clear, and frequent feedback in a variety of formats.
- Provide opportunities for collaboration.
- Encourage and provide opportunities for reflection.
- Design curriculum that engages learners in making connections among theory and practice using higher order thinking.

The nature of distance learning as it is now conceptualized may not be supportive of collectivist cultures. Anakwe, Kessler, and Christensen (1999) found motives and communication patterns of learners from individualist cultures were supported in a distance learning environment more so than learners from a collectivist culture. The key areas that were not conducive to the collectivist learning were the very characteristics of distance learning that are touted as the greatest benefits: learner's self-reliance and independence. The authors believe that this may reflect a cultural predisposition toward technology. When used as a medium to work alone and compete against others it may appeal to individualistic learners but when technology is used to communicate and collaborate it may appeal more to collectivist learners.

A generalized cultural learning orientation in a Web-based learning environment can help the learner draw upon what they know and are familiar with as they are assisted in transferring their skills and knowledge acquired in traditional learning environments to online learning. Some types of CBT may be better suited to cultural orientations than other. For example, a simulation-game can support much of the Hispanic/Latino style preferences in that it can be highly interactive, can engage the learner at higher levels of reasoning, and can adapt to the learner's entry level of skill.

Net Generation

Another consideration for adaptive learning is the age of the target population. There is a growing body of evidence that suggests that design needs and preferences may vary among age groups. The Net generation [6] has grown up with a variety of electronic media that are unique and which research suggests has influenced their perspectives and preferences (Tapscott, 1999). This generation::

- Has grown up with digital entertainment
- Has access to digital resources outside of schools
- Accepts diversity
- Is curious
- Is assertive and self-reliant
- Is strongly independent
- Tends to be emotionally & intellectually open
- Is inclusive
- Is freely expressive
- Tends to be innovative
- Is investigative

Most of the Net Generation has had access to computers and the Internet at home (Grunwald, 2000). This is not true of many minority groups, including the Hispanic/Latino population (NTIA, 1999). It is not clear that one population has a advantage over another when confronted with digital learning environments, however, it can be safely assumed that familiarity with technology reduces the cognitive load when the learner engages in CBT training or learning.

Educators and instructional designers should take heed of these characteristics that may not be reflected in traditional development processes. When designing instruction for this generation within a technology-based environment the following factors must be considered: gender differences in the use and application of technology, the preponderance of digital play as opposed to the work ethic of older generations, the influence of global information and relationships, and

the decreased reliance on a teacher for guided learning. Clearly, the attributes of this generation suggest a need for self-directed learning within an environment that allows exploration and problem solving.

Research indicates that simulation and games can support higher order thinking and problem solving (Hamel & Bishop, unpublished). Although here is little current research that indicates members of the Net generation have better cognitive skills that their counterparts from other generations, their tendency toward autonomy and independence suggests that these learners may be better problem solvers who can analyze, synthesize, and evaluate effectively (Grunwald, 2000;Tapscott, 1999; McKenzie, 1998; Bloom, 1956).

As distance learning appears to be on the brink of becoming a preferred mode of learning in the workplace, the generation that will be most effected is the one now entering the workforce or completing an undergraduate education. The autonomous and independent nature of Web-based learning necessitates problem solving and higher order thinking for the learner who primarily interacts with a computer rather than receiving individual feedback from an instructor. Simulation-games are by definition dependent upon higher order thinking and require the player to make independent judgments and thus provide a remarkably well suited environment for a novice distance learner to test the waters of Web-based learning.

Conclusions and Recommendations

Globalization and the increasing prevalence of the Internet in homes, workplace, and public institutions require that instructional designers and educators look beyond generalized approaches to learning and focus on multiple paths for acquiring knowledge. Although many distance learning programs currently survey potential students about their probably success, there are few systems that provide training to insure success. Shifts from broadcasting to narrow-casting and from large group learning to individualized learning indicate that in order to meet the growing demands of just-in-time and just-in-need learning, Web-based learning must be flexible and adaptable to the learner, not just the content. The design and development of Web-based learning environments should include:

Analysis of target population(s) preferences in Web design, interaction as well as entry technical and communication level skills. This is essential to the instructional designer who may enter into the design process with an unconscious predilection for certain interface designs and pedagogical approaches that limit breadth of enactive, iconic, and symbolic representations (Bruner, 1960).

Review of content by subject matter and culture experts for design integrity and cultural relevancy. As the work and learning place is gradually subsumed by what we now call the Net generation, considerations described here may become superfluous. Until then, it is the responsibility of trainers, educators, and instructional designers to make conscious and informed decisions about how the unique needs of a learner can be best supported in Web-based learning environments.

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End Notes

[1] Acquiring skills or knowledge as it is required.

[2] Learning or training that is not necessarily required but may be used in the future.

[3] On demand episodic learning in which the learner determines what they need to learn and who can offer the most appropriate education or training (Campbell, 2001).

[4] Relates prior experiences to new learning.

[5] Adaptive learning recommends that learners are given choices or directed to the most appropriate level of learning. One course might be designed to accommodate a learner who has no experience with content or some experience. Entry knowledge would determine the path the learner follows.

[6] Anyone born after 1979 who has grown up with access to and experience with electronic toys, communication tools, and Internet resources (Tapscott, 1999; McKenzie, 1998).

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EDUCATION at a DISTANCE

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Editors Note: Experience is dispelling many myths about learning from the World Wide Web. Students throughout the world benefit by distance education. In rural schools it greatly increases the resources available for student research and independent learning. In this instance, the students' educational opportunities were almost doubled, leading to improvement in academic achievement.

Distance Education in Rural Public Schools

Jason L. Hicks

Abstract

With technology becoming more and more user friendly, educators have been using computers, IETV, and the Internet to teach students in new and interesting ways. Rural schools benefit from distance education in the fact that it allows those schools to give students the same opportunities as larger, more urban schools. Students were allowed to participate in more complex and diverse subjects. In some instances, those subjects were taught from other public schools or from regional universities. Drawbacks such as technical difficulties and fear of technology by educators and community members hindered the widespread use of distance education. The hypothesis that there was an improvement in academic achievement for rural school students who learned through distance education was accepted.

Introduction

Oklahoma schools found that student academic needs were not being met. Benson (1998) noted that a lack of educational opportunities has been problematic for rural schools. He stated that "test scores were abysmal, communities were losing faith in their schools, and with students performing well below their ability, teacher morale had hit an all-time low" (p. 42).

It has been noted (Benson, 1998, p. 42) that the lack of available courses and credits has denied rural students the opportunity to grow as individuals and attend the college of their choice. Rural school administrators, under pressure from the community and state, found a way to give their students the chance to compete with bigger school districts. To be able to provide the courses and credits necessary, rural administrators turned to distance learning.

Problem Statement

This study determined if distance education prepared rural school students for academic success.

Hypothesis

There is an improvement in academic achievement for rural school students who learn through distance education.

Review of Literature

The Dover Public School had toyed with the idea of using distance learning for some time (Benson, 1998). It was finally decided that distance education would be the tool necessary to meet the needs of the students. Dover and eight other school districts created a network to link students and instructors to other classrooms.

According to Benson (1998) a series of problems, unique to distance education, was overcome by administrators in the schools. With no adult in the receiving classroom, discipline became one of the more important factors of distance education. Administrators reported that there were no problems with discipline in these classrooms, due partially to the fact that the technology used stimulated the students and held their attention to the subject. “Moreover, students hesitate to cause problems in front of students from other schools” (p. 42).

Homework and the way that the instructor would receive it was another problem that arose. The fax machine was the answer. The students would send homework to the teacher via fax. Cheating was a concern in that teachers believed that students would simply copy and fax each other’s homework. Placing a camera focused on the fax machine solved that problem.

Other problems arose such as community and teacher acceptance. Both of these problems were solved by a simple open house of the classrooms used in distance education.

A perspective of how to get students to become interested in education has been shifting to a more student-centered system. “For many years, marketers have recognized that the way to improve satisfaction levels and commitment in consumers is to identify desired traits and tailor their products to include those characteristics” (Phillips & Peters, 1999, p. 351).

Educators have finally realized that they can no longer just offer the courses and expect people to enroll in the classes. They have realized that education is a product and that they must sell the product to the student. In the study by Phillips and Peters (p. 354), two groups were set up to identify and evaluate the needs of distance education students. One, the control group, was made up of traditional, on-campus students. The other nontraditional group was made up of off-campus students from a rural area. Surveys were handed out to the students in the off-campus group to compile what their needs in education were.

One of the concerns by the faculty was that the off-site students would not have personal interaction with the instructor (Phillips & Peters, 1999, p. 353). The faculty was fearful that the student would not receive feedback as often or as quickly as the on-site students, lowering the motivation of the students. The instructors were afraid that there would be a lack of satisfaction in the education process (Phillips & Peters, 1999, p. 353). With that lack of satisfaction, instructors were afraid that attentiveness would fall and the students would simply not be happy with their education.

The satisfaction of the students was a big factor in the determination of the course. Each student (or customer) has a different idea of education (or product) outcome. With different ideas of how the class should be taught and what they should get out of the course, each student’s needs must be met or student and instructor must reach a compromise.

In their study (Phillips and Peters, 1999) the on-campus students had access to the professor most of the time, though the professor would sometimes travel to the off-site locations to teach. The results of the study found that the on-site students felt the “professor was less accessible because of the style and technique adjustments made to accommodate the remote students” (p. 355). The study found that if there was a continued rise in the number of remote students, then on-site students might grow increasingly dissatisfied with their education.

Universities have continued to change their approach in getting students interested and enrolled in distance education courses. Whether these courses were taught in a traditional classroom or by distance education, the needs and/or wants of the students must be taken into account and the marketing strategy must be changed to accommodate those needs or wants.

“In an effort to collaborate with Broward County teachers, Florida Atlantic University (FAU) and

the Department of Educational Technology and Research in South Florida have implemented an innovative program to encourage public school teachers to embrace the new technology and utilize it in their daily curricula" (Ariza, Knee & Ridge, 2000, p. 22). This program allowed teachers to gain a master's degree in educational technology so that they could help their cohorts in their schools become more familiar with the uses of technology in the classroom. The group was more confident because they knew that they had teammates to help them with any problems that may arise.

The teachers themselves took courses using distance education from FAU so that they would not have to travel each night to the university. Administrators, lacking knowledge, started to lag behind the teachers as they became more familiar with the vernacular of technology. Administrators soon began to rely on others to explain exactly what was happening with technology and could not keep up with the teachers. Many administrators also took the courses in order to become more knowledgeable and understand exactly what was happening in their schools.

The professor of the master courses had to be certain to allow additional support to these teachers because many of them only had a rudimentary knowledge of computers. The professor also followed a group of teachers from one semester to another, allowing a familiarity in the classroom in the form of the professor. The teachers were more comfortable with this because the professor knew the learning styles of the teachers and the teachers knew the teaching style of the professor.

The classes were mixed with those of limited knowledge of technology and those who were more advanced. This allowed "teachers to do what they do best – teach each other" (Ariza et al., 2000, p. 26).

At the time of publication of the article the teachers were a third of the way done with the program. There was a twenty percent dropout rate that occurred in the program, with various reasons given as to why. The most common of those was a conflict of time. However, the teachers who stuck with the program were very committed to the program and each other.

The integration of technology and media into classes did improve student learning. However, the teacher must be trained correctly for these results to take place. The teachers have continued to incorporate the use of the Internet and web pages in their classrooms.

The last decade has seen a surge in interest of distance education by higher education institutions, state and federal agencies, corporations and the public at large (Barley, 1999). Distance education itself has been around for hundreds of years, but with the World Wide Web, its popularity and use have increased greatly. Therefore, as with any new technology, questions have arisen as to how practical distance education is.

One of those questions was how prevalent were the new forms of distance education? There was an increase in the number of users of distance education, but were those people new users or has it reached "those who already take advantage of most other educational opportunities" (Barley, 1999, p. 56). The goal of distance education was and will be to reach those who want an education, but for some reason or another cannot make it to the traditional classroom.

Were there any practical or cultural obstacles that one must overcome was another question that arose. Socioeconomic status has had a large play in distance education. One of the questions posed was "how do we overcome those barriers?" (Barley, 1999, p. 57). Lower income students were unable to purchase the technology needed to participate in distance education.

Background knowledge of information for subjects was a large factor. Some students were required to take prerequisites before computers or other technological devices can be used. Distance education required a basic knowledge of computers, the Internet and other equipment.

"All teaching and learning takes place in a context" (Barley, 1999, p. 57). Educational outcomes were very dependent upon the context of learning. The teacher knew traditional classroom students personally. A student's learning an instructor in the traditional classroom often knew style and home problems. Distance education teachers did not always have that information, leaving them at

a disadvantage to teach students.

“Most empirical studies have found a range of positive as well as negative finding.” (Piotrowski & Vodanovich, 2000, p. 48). There has been a large impact on how students learn by computer-related instruction. The Internet was leading the way for distance education in all levels of education. Instructors have found it possible to teach students throughout the United States and around the world via the Internet.

The Internet offers the benefits of quick and remote access to knowledge, a convenient way to learn, adaptability, speed and a large audience. However, as with any technology, there were shortcomings that arise such as: a lack of privacy, lower interactions with the instructor and technical difficulties (Piotrowski & Vadoanovich, 2000). The technical difficulties may be anything from a server going down to the incompatibility of software between the professor and the student. Five potential problem areas discovered were “a) credibility of Web information, b) computer network reliability, c) computer availability for students, d) differences in student technological skill and e) lack of ethical knowledge (of students) regarding use of Web information” (Piotrowski & Vodanovich, 2000, p. 50).

“As teachers and students turn to the Internet, distance learning is dismantling classroom walls across America” (Barker, 2000, p. 88). Technology advancements, especially in the communication area, has allowed distance education to become increasingly interactive, either via IETV or the Internet. The digital revolution has given a large rise to online classrooms. With technological advancements, time-sensitive materials can be delivered much more rapidly, and teachers and students can communicate much quicker. This allowed for feedback that gave students a better knowledge of how they were doing in a subject.

Some of the advantages of distance education were more apparent than others. The long bus ride to a remote area was avoided and some students were attracted by the technology that was used. “Students with physical or mental disabilities sometimes turn to distance learning to avoid the stigma they fear they might encounter at a more traditional school” (Barker, 2000, p. 90). Parents have also turned to distance education because of the rise of violence on campuses.

Resources can be very organized on the Internet, which allowed for easy information access and exchange. Students and teachers alike used the web because someone has already done the work of finding the information for them. The Internet allowed students and teachers to “exchange greetings, engage in intellectual discourse, conduct meetings, share knowledge, offer emotional support, make plans, brainstorm ideas, learn about other cultures, and otherwise broaden their mental horizons” (Barker, 2000, p. 91). The Internet allowed them to do anything that they might do in a traditional classroom.

The Internet provides an activation of all of “sight, sound, and cognitive reasoning, engaging students and creating active learners” (Barker, 2000, p. 91). Many different activities can be assigned to the student that will enhance their education. Anything from having discussions with a foreign student to research about the universe was possible.

The Internet was double-edged sword, as students can access any educational database, learn about any country, but can also be subjected to perverse and deviant topics. Schools and parents must work together to screen and prevent access to any thing that might hinder the moral education of a child.

Methodology

This paper was written using the same technique that it is about – the Internet. All of the resources used were found using FirstSearch, WilsonSelectPlus and EBSCO educational databases. This approach was taken to prove the point that distance education and online resources are viable for the education of rural students. This content analysis paper was written in APA style. Accidental sampling was used to gather information from available cases.

Results

The hypothesis, that there was an improvement in academic achievement for rural school students who learned through distance education was accepted. It has now become possible for learning to take place anytime and anywhere. From home to school to across the globe, students have greater access to knowledge and instructors, which has allowed them to expand their educational horizons.

The greatest accomplishment of the network that Dover Public Schools co-created was that students in those rural Oklahoma schools now have access to over seventy-three units of credit in various subjects, versus thirty-eight units offered in 1994 (Benson, 1998, p. 43). Distance education was started in kindergarten that allowed the students to gain the skills that they needed to become successful. “Test scores are consistently up. Teacher morale and community perception of the quality of education at Dover is at an all-time high” (Benson, 1998, p. 43). High school students in Dover have taken advantages of the challenging courses that were not available before.

In a recent study Education week (as cited per Barker, 2000) published that researchers found that “fifty-one percent of American classrooms reported having Internet connections in 1998, an increase of twenty-seven percent from the previous year” (p. 90). That same study showed that forty-nine percent have high-speed connections to the Internet. These figures proved that the purchase of technology was on the rise and that families now have more access to the Internet, allowing them, if they choose, to take advantage of distance education.

According to Barker (2000) many online classes have greater advantages than the traditional classroom. Field trips to the local museum have become digital, new information in the classroom can be expanded upon through the internet, lesson plans were available to teachers, students can collaborate with other students from around the world, and students were privy to large collections of information.

Conclusion

The author’s hypothesis, that there is an improvement in academic achievement for rural school students who learn through distance education is accepted and supported by the literature. The subject of distance education is very important to the author. Rural schools often do not have the resources available to give students an education that will allow them to succeed in higher education. As in the case of Dover Schools, the students’ educational opportunities were almost doubled according to Benson (1998) from thirty-eight unit credits to seventy-three.

Students throughout the world benefit by distance education. Students can learn from both teachers and other students from across the globe or from across town. Distance education can be best summed up by the statement made by Barker (2000) that technology will continue to grow and places “the information of the world…at their fingertips-anytime, anyplace” (p. 92).

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Editor's Note: We are pleased to be able to share this masterful multi-disciplinary outline used by Dr. Bensusan as course content for his online classes. Guy, with effortless grace, wove together art, music, history, and culture, covering a sequence of a hundred years. The rich panorama of societal change provided depth and substance for his comprehensive Humanities Studies. The material presents a wonderful model for online (and on campus) teaching.

CARMEN AND HER UPDATES: AN INTRODUCTION

Guy Bensusan

The basic story of Carmen and José is that in Spain's northern mountains near the French border, a young and unworldly man from a good family of minor nobility lived with his mother. This Don José, while studying for the priesthood, got into a fight over a game and killed his opponent. He fled, enlisted in the army and then began a promising career in Seville, a major garrison far to the south. He met the gypsy temptress Carmen, who flirted and fascinated until he lost all sense of his family and professional responsibilities. Breaking army rules, getting ever deeper into trouble, he killed an officer and fled to the mountains with Carmen, joining her bandit friends in thievery and smuggling.

He then killed Black García, Carmen's original husband, and took charge of the smuggler band so effectively that government officials posted a big reward for his capture. But Carmen he could *not* take over: she simply refused to be ruled. They argued, fought, and when he beat her in exasperation, she ran off to her bullfighter friend, Lucas. Risking certain capture, José followed. When neither threats nor pleadings worked, he killed her with García's knife, and then surrendered to be executed for his many crimes.

This elemental nucleus has evoked endless variations. They are found in literature, verse, opera, instrumental music, vocal music, theater, dance, motion pictures, staged musicals, filmed opera and ballet, and community plays. Carmen and José have appeared in movie cartoons, comic strips, and slapstick vignettes by Jack Benny, Fred Allen, The Honeymooners and Lucille Ball, as well as longer parodies by Spike Jones, Stan Freeberg, Monty Python and Benny Hill. They and the well-known operatic music have been the frameworks for countless television advertisements for automobiles, breakfast cereals, appliances and other consumer products.

There are social-comment Carmens, political Carmens, cultural-diversity Carmens, pornographic Carmens, voluptuous vampy Carmens, disturbed Carmens, spacey Carments, old-fashioned Carmens, modern Carmens, multi-level Carmens, surreal Carmens, deconstructed Carmens, and expurgated Carmens for children of varying shades of innocence. Regardless of their nature, however, they all share two basic features: José always kills Carmen in the final act, and the authors telling the story are always male. It is past time for a change!

One Carmen is an all-Black almost-minstrel show. Another uses a Flamenco dance frame and setting. A recent spectacular motion picture is an outdoor extravaganza, magnificent with soft Andalusian and Goya colors, filmed on location in one of Spain's historic southwestern countryside

and town, replete with its small bullring. In contrast, a tense, somber theater production uses a minimal cast, minimal orchestra, and a closed-in stage set focusing on the dehumanization that resuslts from grinding poverty. Another exploits a manipulative female in a New Wave display of clever filming techniques, camera angles, mind-jolting edits, and similar visual devices, commenting brazenly on nature, culture and art.

There are Classy Cabaret Carmens and International Ballroom Dance Carmens, exaggerating the male-female roles. The l988 Olympics publicized skaters Debbie Thomas and Katerina Witt as "the Dueling Carmens," while the sequel with Gold Medalists Katerina Witt and Bryan Boitano was called "Carmen on Ice," filmed in Seville anticipating the 1992 Quincentennial. With today's fascination for ice skating, the Carmen singles and the Carmen-José doubles portrayals are presented to a wide array of Tango, Paso Doble, Rock and Country-Western music.

These Carmens exist over and above the continuous operatic stagings: Carmen is clearly the most popular opera ever written, judged by frequency of presentation, multi-national acclaim and constantly favorable reviews and commentary. The story of Carmen, the tragedy of José, or maybe the joint tragic situation, carries a potent message for audiences of varied generations everywhere. Despite her violent, inevitable death in the final moments, and regardless of the worldwide growing objection to this abuse of woman, ***Carmen lives***. She remains alive and well in today's art forms; and where Carmen captivates, will a José not be near?

Prosper Merimee's Carmen.

While one might make a case that Eve, Lilith or Delilah were "earlier Carmens," the original Carmen *story* appeared in 1845 by the French author, Prosper Merimee, who claimed to have earlier heard a Spanish legend from a noblewoman he knew in Madrid. Writing a short novel, Merimee introduces us to the interesting, cavalier activities of a learned, likeable French scholar traveling in Spain. He narrates amusing anecdotes and describes his meetings with bandit José, who in turn recounts his troubles with gypsy Carmen and her many lovers, including Lucas, a minor hero of the Andalusian bullring. The scholar also dallied dangerously with Carmen, who steals his heirloom watch and otherwise treats him shabbily.

However, our knowledge of and information about Carmen is *all* second hand: all from the mouths of men, or, in the case of Carmen's spoken words recorded on paper, from the pen of the male author, Prosper Merimee. We are caught in the same difficulty that we have in knowing Eve -- since the witnesses are not female, neither is the point of view. Might not a courtroom judge today disallow all of such testimony as hearsay.

Merimee's story is solid Nineteenth Century Tragic Romanticism. For setting he uses the rustic color of rural Andalusia -- a land familiar to Frenchmen whose forefathers fought pagan Moslems and the powerful armies of Spain's wealthy Hapsburg Kings. Later, French soldiers supported a member of their Bourbon family when he became King Philip V of Spain. At the turn of the nineteenth century, France's population heard countless war stories told by veterans of Napoleon's Peninsular War (1808-1813). Those military men spoke of seductive Gypsy women, perhaps fondly and longingly? Is Carmen perhaps a French man's locker-room story? Or was Carmen packaged and marketed as an Exotic, Foreign, Seductive, Culturally-Diverse Charmer, the type so admired by the Nineteenth Century Romantics?

Merimee's scholar is an interesting protagonist: urbane, courageous, a gentleman of reason, observing details objectively, displaying good manners, and projecting intelligent, logical, sensible foresight, sympathy and wisdom. How ennobling may it have been for French men to perceive themselves portrayed in this fashion? Merimee ridicules the incompetence shown by government and military officials, along with their greed. He is also fascinated by gypsy culture, telling us of their colorful proverbs, hostility to central authority, zeal for freedom and the open road. One might naturally expect the use of such images in a national society beginning to notice that it lived in the soot, urban crush and pollution of the early industrial revolution.

The Petipa Ballet. Merimee's novel met with instant acclaim -- so much so that the noted

choreographer Marius Petipa immediately created a concert ballet out of the story. It was called Carmen et son torero (Carmen and her bullfighter) and was presented in Madrid that same year, 1845. It was a success overnight, and its showy costumes, settings and choreography is rather well-described in most major reference works on the history of ballet. However, there is irony in Petipa's success -- in Bourbon and urban Spain it was in vogue to accept French cultural enactments as the artistic model, in spite of the fact that Merimee's verbal portrait of Spain was less than flattering.

Georges Bizet's Carmen.

Thirty years later, Carmen was recreated by Georges Bizet into an operatic form which was performed in Paris in 1875. The story-line and dialogue departed from Merimee's story in several ways, being written under the vastly different social-political conditions of the Franco-Prussian war and for the more overtly monetary purposes of the libretto writers, Meilhac and Halevy. Bizet composed melodies which are among the best known songs in operatic literature, making Carmen the most popular of operas. It is common for people not to know Merimee and to assume Bizet's Carmen is the original story!

The opera altered the story theme by adding two significant characters, both serving as dynamic contrasts to Carmen and José. Opposing the "unholy" Mary of Carmen is pure, virginal, motherly Mary, Micaela -- added to satisfy the operatic need for a soprano as well as to portray idealized moral qualities of womanhood. Micaela intensifies awareness of José's pathetic choices, magnifying the dramatic struggle. Bullfighter Escamillo provides the gallant, wealthy, adored hero: an ideal figure making young girl's hearts palpitate. Poor mediocre José never has a chance: he lacks the wealth, the aura, the brass, the style -- one eventually wonders what Carmen could possibly have seen to admire in José! But that is the way the author wrote it, revealing contemporaneous intentions.

The initial performance of the Opera in 1875 was not a smashing triumph, and Bizet died disappointed some three months later. Still, Carmen soon became a regular offering at the opera house. Thirty-seven performances were given in Paris that first season, with many famous singers such as Celestine Galli-Marie and Minnie Hauk later achieving great acclaim during the remainder of the century. The opera was introduced into England in 1878 and into the USA later that year, and Carmen was highly popular long before World War One.

Early Motion Pictures.

When silent motion pictures appeared, Carmen not only began to reach a far wider public than those who went to the opera house, but also became a much more intimate and meaningful character, since camera techniques brought the drama and actor's expressions so much closer to the spectator. The first Carmen film appears to have been made in France in 1909. A Spanish version appeared in 1910, with another was produced in 1914. Hollywood created two entries in 1913, the first with Marguerite Snow and the other with Marion Leonard.

In 1915 came Cecil B. Demille's Paramount production starring opera singer and actress, Geraldine Farrar. Fox Studios countered simultaneously with Raoul Walsh directing "the Vampire Woman," Theda Bara -- ironically, the version by the singer was adapted from the original novel, while Vampy Theda slinked about the operatic staging on silent film! One may read about audience response to these two films in the New York Times film review, dated November l, 1915 (See the essay called, Reviewing the Reviews). The critic was certainly not impressed with movies as a vehicle for serious art! Nor did he appreciate the local theater musicians' un-operatic effort to provide some sound.

Charlie Chaplin. Despite critics, audiences adored the new Carmens. Small wonder that Charlie Chaplin filmed his four-reeler burlesque of the Farrar and Bara films in 1916 with Edna Purviance as the lead and himself as José. It is melodramatic fun to watch as Don José (called Darn Hosiery), sent to capture the smugglers, turns out to be un-bribeable and is given Carmen as a booby prize.

He fumblingly falls for her, but she scorns him and heads for town. Hosiery follows and watches her take up with an enormous, gluttonous Escamillo. Ranting and raging, Hosiery gets Carmen alone, stabs her and then, himself. At that moment Escamillo walks in, but seeing the corpses, wanders off in search of other fun. We feel some sorrow, but they both bounce back to life -- Hosiery shows us the rubber dagger, and tragedy ends as farce.

After Chaplin, Carmens proliferate. In 1918, the German director, Ernst Lubitsch, cast Pola Negri, the African American actress who had climbed to stardom in Europe after leaving the United States. Pola's sensuous dancing achieved enormous continental success in Western Europe before the film toured the USA in 1921 under the title, Gypsy Love. French, Spanish, and English directors provided more Carmens in the 1920's, and in Hollywood, Raoul Walsh turned from his earlier opera to an original version of the Merimee novel: The Loves of Carmen (1927), starring Dolores del Rio as a zealous, creatively resourceful and very daringly-devilish Carmen for that date.

Early "Talkies." "Talkies" (meaning added sound track), developed at the end of the 1920's. The first sound version of Bizet's Carmen was filmed in England in 1932, though it was in black and white and the reproduction of the operatic voices was not realistic by modern standards. In Germany during 1933, Lotte Reiniger directed a short film combining the opera music with visual silhouettes. As pantomime, it received favorable response. Other Carmens were produced in France and Spain, but I haven't seen them.

Florian Rey's Andalusian Nights. In 1938 Florian Rey presented the lovely actress, Imperio Argentina, in his Buenos Aires production of Noche Andaluz (Andalusian Nights). The tone and theme clearly echoed the traditional if paradoxical lament of the extremely popular Argentine tango. One can easily imagine José, like Carlos Gardel, leaning against a lamp-post on the corner, with a long cigarette hanging from his lips, and singing such lyrics as:

"Oh, women are beasts: evil, lusting, deceitful, hateful, grasping, treasonable; impatiently waiting to bankrupt and destroy some innocent fellow. A man should place trust only in his mother."

This was certainly not the way in which women were normally portrayed in motion pictures made in the United States at that time, even if we consider Scarlet O'Hara and the Wicked Witch of the West.

Interestingly, on the eve of the invasion of Poland, this Argentine film was modified in Germany into Andalusiche Nachte, and later readapted by Italian and French directors in 1942 and 1943 -- at the height of German and Italian military defeats in North Africa, Sicily and Stalingrad. Here the directors maintain the formula of flawed, tragic hero: falling because he lacks weapons for defending his feelings against "innate animalistic wiles of a street-smart, sexy seductress." Shades of Evil Eve?

Neither mother, nor "pure maiden," nor his own love of honor can prevent complete disaster: in more recent words, José cannot fight Mother Nature, either with ideals or theories. Rey's Argentine thesis is perhaps a political allegory, personifying the hopelessness of Germany, Italy and Japan in trying to fulfill their long-range, politico-military global conquest goals against more numerous, more versatile opponents who had access to a wider and more reliable pool of resources during World War Two.

Carmen Jones.

In contrast, Carmen became a Broadway musical with societal and old-timey vaudeville minstrel flavor. In 1943 the war was going well for the allies, even though it was not yet won. Billy Rose, collaborating with Oscar Hammerstein II, reframed the opera into a rural Southern Negro adventure. Carmen Jones was a busty, hip-swinging good-time gal with a job in a parachute factory, even if she didn't seem patriotically dedicated to the war effort. Air Force Corporal Joe had demonstrated potential and was given a chance to be officer and fighter pilot, which would move him socially into a fraternity restricted to white men.

His sweet-Micaela girl-friend is called Cindy Lou: she is cute, petite, rural and uneducated. The bullfighter rival was now Husky Miller, a heavyweight boxing champion, though he could easily have been a jazz musician. There is plenty of patriotic, "win the war, fight like hell, don't quit until you hear the bell" rhetoric in the lyrics. The music was Bizet's, with jive-talk mannerisms creating an inaccurate, unconvincing and unflattering "down-home" image.

Despite an excellent performance by the "All Black Cast" (a "famous first" at the time), the underlying message to the white Broadway audience turned Carmen Jones into a cultural distortion: this was a white middle-class idealized image of what Blacks might turn out to be "if they would only try to better themselves." Given the changes which have occurred in American society since World War II, it is much easier to discuss such racial or racist matters in 1994 than it was in 1943 -- and not only because of "political correctness."

As a musical theater hit, it was first recorded on 78's by Decca, issued in 1952 as an LP (MCA-2054). It was another "famous first" when Otto Preminger turned it into a successful motion picture with Dorothy Dandridge, Harry Belafonte, Olga James, Joe Adams, Brock Peters, Pearl Bailey and Diahann Carroll. It won several awards for best musical, despite dubbed operatic voices. It was film of the year, and Dorothy Dandridge barely lost the Best Actress Oscar to Grace Kelly.

This Carmen is unlike others. She flirts with the sergeant and later with Husky, but she really seems to care for Joe -- cleaning mud from his uniform, brushing his shoes, straightening his belt and shirt, preparing a home-cooked meal, and refraining from going out with other fellows while he's in the guardhouse! More than sinister, she seems reckless and immature during the seduction scene at her home. Nor is she Gypsy: just a sexy Southern Black girl with urban manners, enjoying "good-timing" in the big city, in this case Chicago. She doesn't seem to believe in the fate symbols which her aunt tells her not to defy. No cultural differences exist between Carmen and Joe here.

Intra-Black hostilities are implied through casting -- light-colored, socially-mobile Joe is harassed by his sergeant, who is far darker. Had they been the same degree of "dark," the unclear motives might have more easily been seen as a matter of personalities and career opportunities. Instead, they seem to be related to matters of color, since the sergeant might have envied Joe being awarded a chance to go to flying school, while he, the veteran was not. The visual truth of a Black officer exists in the film: a timely casting choice, since the motion picture came out at the beginning of the Civil Rights movement. During the Korean War, Black military officers served -- there is more realism in the 1954 movie than the 1943 Broadway version since Black officers were not in World War II.

Social mobility through sports is highlighted visually and through dialogue -- one thinks of Joe Louis and Jackie Robinson. The focus is on violence, with long scenes devoted to Black boxers pounding each other in the ring while the audience screams for blood, something not emphasized in the Broadway show. Moreover, Joe doesn't stab Carmen, he chokes her -- and in his final lament asks to be hanged high on a tree! One might suggest that hanging and garrotting (which Don José was entitled to as nobleman) are parallel, but for the general Anglo-American audience, probably unfamiliar with Merimee's novel, the allusion probably is more akin to "lynchings." Carmen Jones is a collector's item -- hard to find and rumored to be withdrawn from circulation at the request of the NAACP. Rumor says the remake is in "rap."

The Loves of Carmen.

The first post-war "Carmen" was in 1946 with Vivian Romance's lusty characterization of a carefree, unprincipled seductress, in a non-singing role which had been dramatically adapted from the novel and filmed in Rome by Director Christian Jaque in 1946. The costumes and acting in this one were highly dramatic, "molto Italiano."

A similar portrayal was given two years later by flashy glamour queen, Rita Hayworth. The well-known Loves of Carmen was adapted from Merimee by Helen Deutsch, filmed in Technicolor, directed by Charles Vidor for Columbia Pictures, and featured a young Glenn Ford as

the innocent youth about to be transformed into a killer. His metamorphosis is foreshadowed early in the introduction with the Genesis allusion to forbidden fruit -- not apples but oranges, stolen by the "evil woman," then presented by her to the naive man who foolishly accepted them.

When the owner cries "thief," Carmen and José run away. The treatment is melodramatic, with flavors and trappings of a Western, so popular at that time: cavalry chase, stagecoach holdup, and multiple wanted-posters shown sequentially with ever-increasing reward amounts. We get homespun philosophy about good and evil, making proper choices, getting caught in vicious cycles, starting over in a new land, and having a sense of honor, right and wrong.

It fulfills public morality in the 1948 post-war era: outlaw José stabs the anti-societal Gypsy Carmen and is then shot by a soldier, a symbol of orderly society. Carmen is not the ideal needed in 1948, one who will be satisfied as a consumer-oriented housewife in expanding suburbia -- one instead wonders if she might have been a good wartime Rosita-the-Riveter.

As in Carmen Jones, red-haired Rita is not "true Gypsy:" maybe the US can't comprehend Gypsies since they do not exist here as they do in Spain and other parts of Europe. Rita talks about being one, but acts more like a pouty, moody, fun-loving, big-city woman in the United States. The apparel is also unrealistic -- Rita's sumptuous, colorful and frequent costume changes are highly Hollywood and out of place. Popular then, it evokes laughter now. Rita sings and dances -- but music and movements are Mexican; what did the movie public know of Spain in 1948? The Loves of Carmen contains excellent camera work, for which cinematographer William Snyder received an Oscar nomination. It is a wonderful film to use for teaching about film making.

Other Carmen Ballets: Ruth Page and Roland Petit.

Back at the concert hall, Carmen had again donned ballet slippers. At least two dance versions appeared during the l930's, including a modern one by the renowned Metropolitan Opera ballerina, Ruth Page. This was her first effort at a ballet from an opera, and others followed. Supported by the Works Progress Administration (WPA), her work was performed under the title of Guns and Castanets in Chicago in 1937.

A decade later dancer-choreographer Roland Petit, abandoning his classical training, began to develop post-war sensual patterns and movements with the Paris Opera Ballet. After founding his own Ballets de Paris in 1948, Petit created a gutsy Carmen around Merimee's story with Bizet's music, starring his wife, Zizi. In five unconventional scenes, it began with the tobacco factory fight. Soldier José separates the two women, asking Carmen for a date. They meet in the tavern, where Carmen is fighting off a would-be suitor. Getting impassioned, José carries her off to bed. The two wake up and plan a robbery, where José kills one of the victims, and the robbers drag him off to avoid being captured. Carmen then flirts with a bullfighter, enraging the possessive José, who ends her life. The show opened in London in 1949, ran four months and then five more in Paris and the US. Critics wrote, "satanic woman had again led innocent man to destruction!"

Interestingly, while audiences loved it, some critics complained that Bizet's perfect plot had been distorted. However, since Petit had worked with Merimee's story, critical reaction illustrates how deeply Bizet had created the standard that other productions were measured by. Various later versions of Petit's ballet used music from Sarasate's Carmen Suite. In 1980, a 44-minute video was released by KULTUR in France, and starred Mikhail Baryshnikov dancing the leading role along with Zizi Jeanmaire and the National Ballet of Marseilles.

The Alonso Ballet. The next major Carmen ballet creation was developed by Cuba's Alonso family. Choreographer, Alberto, had a younger brother, dancer Fernando, who married Alicia. All had been born about the time of World War I, had become well known in the ballet world by the thirties, with Alicia creating a successful "Giselle" in the United States. Deeply involved with both Cuba and the United States, and later developing the Ballet Nacional of Cuba after Castro's rise, both worked at developing a non-traditional Carmen who emphasized the pureness of spirit described by the Spaniard, García Lorca.

In 1966, Alberto created the Carmen Suite for Maya Plesitskaya at Moscow's Bolshoi Ballet. Alleged eroticism brought government complaints, but the debut was on April 20, 1967, contrasting an honest, sincere and free-spirited Carmen with an untrustworthy, ever-compromising, moody José -- a role reversal. Bizet music was adapted and modified for the Russian performances as well as the 1970's abbreviated version danced by Alicia Alonso in Cuba at age fifty. Alicia, as seen on a video released in 1986, gives a personal, feminine interpretation, dancing like a real woman, whereas Maya is more traditional and classic.

Italian Carmens. By the 1960's additional directions were visible. Up-to-date, sexy, pouty Carmens had appeared in the works of Italian directors Mario Scotese (Carmen Proibita) and Carmine Gallone (Carmen '63 or Carmen di Trastevere) -- though neither seems to have lasted long at the box office.

Carmen of Ronda. In contrast, a popular movie filmed on location in the spectacular cliff-edged town of Ronda in Southwestern Spain, gave a far different and highly Spanish story of the Gypsy girl. The context is Napoleon's occupation of Spain in 1807, with Spanish citizens rebelling against that invasion. José is a French soldier, while Carmen is a patriotic Spanish woman. Unlike Bizet, the lusty-busty-crusty schemer is Micaela, while Escamillo is a bullring star who has been given great freedom of movement by the French commander and can thus serve as courier for the rebels. José falls for Carmen, betrays his flag, and both get killed by French troops in the uprising. It is intriguing and evokes many questions about the original story Merimee might have been told in Spain.

"Looney Tunes." More important for US audiences were cartoons in the Porky Pig format with traditional comic pursuit involving Bugs Bunny as a toothy, flop-eared Carmen, replete with mantilla, fan, painted beauty mark and ridiculously long false eyelashes -- while the bull chased Elmer Fudd. Two of the offerings had punning titles, such as Carmen Get It (1963) and Carmen's Veranda (1964), a frolic on Brazil's singer-dancer, Carmen Miranda.

The Opera as Technicolor Film. The first major color film came in 1967, with Herbert von Karajan conducting the Salzburg Festival production starring Grace Bumbry. This made the actual opera into a motion picture, altering its essence with camera work and making it more widely available. It added the exciting dimension of zoom lens, allowing the audience to see expressions on the faces of the singers more clearly. This step was an important technological event in that it began to blur the border between opera and film. Henceforth, the element of "the close-up" would be in the operatic vocabulary.

Carmen in the Buff. A more revealing approach came out in the same year as, Carmen, Baby. Radley Metzger, an American producer known for erotica, filmed a bisexually-explicit set of repetitions-variations at a small village on Yugoslavia's Adriatic coast. Carmen, played by young Uta Levka (resembling Rita Hayworth), is involved with crime, including the blackmail of tourists photographed in bed with whores. José is a jealous cop, willing to shoot Carmen's playmates, while Escamillo is a rock singer called "Baby Lucas," alluding to Merimee's bullfighter. There is no Bizet orchestration, only rock and roll. As Vincent Canby said in his New York Times review on October 7, l967, the Rialto Theater spectators were more interested in looking than listening. Despite substituting flesh for drama, the classy photography and setting are perhaps ironic commentary on sex-obsession!

The Big Six.

From 1983 and 1985 six new Carmens appeared from six different nations: France and the US in 1983, Italy and Spain in 1984, and Russia and England in 1985. All came out on video, marketed internationally by networks of book, tape and video sellers, made available to video rental shops, and televised over satellite and cable. The approaches, characterizations, character-conflict developments, socio-cultural settings, meanings and humanistic implications, to say nothing of the artistic and aesthetic values, are highly "Post-Modern."

Jean-Luc Godard. One was First Name, Carmen, directed by Frenchman Jean-Luc Godard, who

first achieved renown as a revolutionary New Wave filmmaker in the 1950's, and continues his off-beat presentations in this later eighty-five minute work. He may even be poking fun of his own earlier movie-making here, since, under his own name, he assumes the role of Carmen's uncle. The character is that of an aging, unhappy former movie director who considers himself to be all washed up in the profession -- we get visual references through endless waves being "washed up" and "dissipating" on the shore.

Carmen convinces Uncle to join her in a new moviemaking venture, and he owns a beach house where much of the story's plotting and naked interplay will occur. Carmen poses as a filmmaker to disguise her criminal activities. She runs with several men who utter revolutionary cliches but act like greedy gangsters. José is a policeman named "Joséf." He appears early in the film with some gendarmes who ineptly interrupt Carmen's robbery. Joséf protects Carmen for no visible reason, driving off with her to Uncle's beach house. The two spend much sex time -- flesh scenes ping-ponged with the sight of endless ocean waves lapping at the beach -- truly a New Wave film!

Joséf shows he does not belong -- certainly not with police life. He has no ambition, drive or competence; his criminal comrades barely abide him and keep pushing him away despite Carmen's many efforts to bring him into the gang. And after her lust wears off, Carmen doesn't want him either. He persistently, petulantly pursues, pathetically obsessed with intercourse. Full of plot twists and often alluding to natural tides and flows, this neo-naturalistic display of the overwhelming urges of nature may be the underlying thesis.

The story line is unclear: it hops, moods change, there are unusual camera juxtapositions, startling edits, and many surprises. Is this an attempt to show life's incongruities? We hear Beethoven quartets, revolutionary and disquieting in contrast to the flowing beauty of Bizet's melodies. But this may be part of the deliberate statement on disharmony today. Allusions are made to Merimee and Bizet in music and word, but they are tangential to Godard's story. The movie is a reel maverick -- regarded as high art by some and a waste of film by others.

Peter Brook. The French-North American production, by director Peter Brook, La Tragedie de Carmen, opened in Paris in 1981 and New York in l983. Controversial for different reasons, it is a skeletal version of the opera, with a cast of seven -- José, Micaela, Carmen and Escamillo have singing roles, while Pastia, Zuñiga and García only dialogue. The music is Bizet's, but the orchestra has been pared to fifteen instruments. The total film length is only eighty-two minutes, or one-third of the time it takes to present the opera. Here is one objection: critics complain, "This is not Carmen; where is the beauty, the joy, the fun, the big crowd scenes, the full sound of the music? The characters are too complex and dismal, things are out of order, many adaptation liberties have been taken; artistic license without responsibility or sense of aesthetic value."

Brook may want the audience to concentrate on social or societal problems rather than personal, moral ones. As the title suggests, this is the tragedy of Carmen, not of José: indeed, it might be viewed as a tragedy for society as a whole. Carmen is not cast as a fun-loving gypsy, she is a prostitute who tries to make the best of her unfulfilled life by finding an escape from her situation: first with her original bondage with García, then through a gypsy marriage to José and finally by a relationship with Escamillo, who does not survive the bullfight.

Nor is Micaela lily white -- she is tough, slapping, kicking and brawling in the dirt when she must. José is NOT a promising young officer -- he is grubby, an ungenial soldier assigned to a remote, dead-end post: he angers fast, kills easily, and focuses on his own wants. Escamillo is no golden boy, either -- he is human, with lusts, postures and fears. It is only Pastia the Pimp, the criminal, manipulator, climber and people-user, who survives and keeps on climbing, leaving the audience wondering about Brook's message.

This is not a gay and pretty Carmen, it is a Carmen without Romanticism; it focuses on the real struggles of an uneducated woman who may only exist as the chattel of some man. Is that a relevant thesis for us to reflect on? Or perhaps it is a ghetto view, where human competition, economic pressures, hopelessness, complexity of vested interests and the weight of the traditional power structure all combine to keep people down in the dirt: homeless, unemployed, uneducated,

victimized? The vision is timely, worth considering.

The film works well as art: it is thematically consistent. It starts in the dirt and ends there. It is filled with images and acts which mold our understanding during the singing of the arias, which have been put in a different sequence. Photography is excellent -- we are constantly aware of artistic repetitions and parallels. Blocking and framing are extremely tight, such as the tavern encounter between José and Escamillo and especially the disengagement of Carmen and José in the mirror during the last act. The characters are multi-dimensional and unusual; similar enough to traditional ones to be convincing, and unique enough to keep us aware that we are being led to consider new perspectives.

This Carmen was filmed with at least two different casts at Lincoln Center; they are often shown on the A & E television channel. While both are the same play, it is enlightening, even astonishing, to watch the subtle changes of implied meaning resulting from (1) varying the camera positions, (2) changing the amount of time and emphasis on specific pieces of business and prop usage, and (3) the altered personal responses one feels in looking at different faces and bodies.

Eva Sauvrova is an older Carmen, slowly losing hope for the future, having faith things will still work out for her. Helene Delavault is younger, more playful -- even ingenuous, she does what she must, but at Escamillo's death, gives up and goes to her execution almost as a suicide. Laurance Dale is a young, smiling, clean-shaven Don José who slowly learns the hard facts of life, but is not driven by the innate fury of Merimee's bandit character. Howard Hensel, on the other hand, seems sad and resigned to whatever fate is coming -- he never appears to have expected success at anything, he just goes on. It would be most interesting to be able to view these different casts in simultaneous or rapid sequential order. In 1994, however, both versions seem to be out-of-print.

Francesco Rosi. Yet another film is by the Italian director, Francesco Rosi, with the title, Bizet's Carmen. Filmed near Seville at splendid locations in the mountains as well as in the old town and bullring of Carmona (or Carmen's town), this outdoor epic stars Julia Migenes-Johnson and Plácido Domingo. This film-opera is two and a half hours long, thirty minutes less than the normal indoor performance. Not that much dialogue is cut -- rather, Rosi uses the overture and inter-act music to provide dramatic visual settings, or better said, setups, which anticipate clearly the conflict-conditions of the forthcoming scenes, the immediate characterizations, and a strong imagery consistent with the mood of that moment.

More than that, Rosi frames, positions and steers our thinking with those same filmic introductions. For instance, the first thing we are shown, even before music begins, is the right leg of a matador, followed by a contrasting shot of the red cape and sword, which become enveloped with a full shot of a bleeding bull. The beginning bullfight intensifies the final, Act Four bullfight -- or rather two fights, since José, dressed in black, confronts Carmen, dressed in red. The finale gives us two parallel killings in two different rings at the same time by cutting back and forth between them. Rosi cleverly uses our expectations, coupled with fine blocking, camera work and the sound track juxtapositions to maintain intensity, excitement and anticipation.

Rosi frequently presents overt visual juxtapositions which are not in the original opera. In the introduction, he shows bull-killing and the exaltation of the bullfighter, then moving directly to a Holy Week procession in old Seville which adulates the statue of a weeping Virgin -- two activities which in real life are in reverse order, but also artistically remind us here of the literal grief over death, as well as the images and symbols of the dual aspect of sacrifice and sorrow.

In Act two, we are first shown the sumptuous home of Escamillo in whose patio a high-class, lavishly costumed dance is presented as a performance for the bullfighter and his guests. Then we cut to the contrast of the gypsy camp, where uninhibited and earthy dance movements are dynamically different, further molding our split-level thinking about class differential and possible implications for Carmen in becoming attached to either of the two leading men.

One may object that Plácido Domingo is a bit old to be a dashing José and also perhaps a bit too tubby to inflame Carmen's passions. After all, this is film, not opera, so appearances count as well

as voices. One may find Faith Esham's Micaela too sweet, too simple, and too pure to be believable. Julia's Carmen may be too happy and lacking in what is traditionally a somber moodiness of her fatalistic beliefs. And Ruggiero Raimondi may be too short to strut well even if he sits tall on his white horse, especially as filmed from below.

One may also protest the matter-of-fact way Rosi makes us conscious of the violence, manipulation and intimidation existing in male-female relationships. Still, the singing, acting, camera work, the visual allusion to the days of the happy Garden before "sex became a sin" are delightful. The ardent, fully-clothed seduction scene in Act Two is most memorable -- audiences simply squirm while viewing it; though numbed from nudity in televition and movies, the fully-clothed seduction appears far more sensual.

Carlos Saura.

The Spanish entry is called Carmen, by Carlos Saura. A fascinating integration of several arts, ideas, and values, it is "a story about a story within a story," making it hard for a viewer to know which parts are real, which are literary-artistic allusions and which are surreal fantasy. The film begins in a mirrored studio; dancer-director Antonio auditions "his" girls while seeking "the perfect Carmen." We are introduced to Spanish popular dance and Flamenco music when renowned Paco de Lucia, after hearing Bizet's Seguidilla, seemingly improvises a guitar rendition in a popular "jazz" Flamenco style called "Bulerias."

Likewise, Antonio is so enthralled by Paco's invention that he calls out to Cristina, his best dancer, and the two perform another apparent "improvisation," this time with the extemporized dance steps which introduce us to the multiple- interpretation layers of this story. Merimee, Bizet and current Spanish culture are closely interwoven in this film; but while it is helpful if one knows the first two sources in order to understand Saura's messages, adaptations and pointed social-surreal commentary, the film is so powerful that it stands on its own!

In the plot many things progress simultaneously, and even though the dialogue is in rapid, slang-ridden Andalusian Spanish, subtitles and especially the body language make the story clear -- or at least as clear as Saura seems to want it to be. Antonio finds a novice dancer named Carmen (played by Laura del Sol): immature, untrained, eager and willing, in whom Antonio perceives the fiery qualities of eyes, lips, body and spirit about which Merimee had written in 1845. A Pygmalion quality emerges in that creator Antonio alters his created Carmen and then tries to possess her, only to find that the reality did not turn out in the way his original illusion had been perceived.

Antonio asks his aging star, Cristina, to help Carmen become a fine dancer, which she unwillingly does, but then is knifed in a spectacular dance number (reminiscent of West Side Story -- or was it just a rehearsal and not the real enmity between leading lady and her ambitious understudy?) There are intriguing, emotion-manipulating reversals, as in our recognition that the young dancer with whom we had earlier sympathized suddenly becomes dominant: Carmen is now the man and Antonio the woman, with each character mouthing relevant dialogue while projecting the appropriate body language.

There are marvelous moments of fun (the mock bull fight) contrasted with the obsessive cane duel (where it is obvious Antonio no longer knows whether he is Antonio or José). Changes in pace and mood are sudden, electric. There are stunning, thought-provoking mirrors, lamps, lightings, reflections and shadows. Steps and styles of Flamenco dancing inform and educate, especially traditional "Sevillanas," a complex four-part structure danced in common culture by thirty million Spaniards who take lessons fervently -- similar to Country Swing.

The drama ends when Antonio (or is it José?) stabs Carmen three times with his switchblade (or did he only wish to stab her in his fantasy?). She falls dead, classic, off-stage: the camera pans left, showing no one had noticed. We are left to ask, "did she really die? Was Antonio exorcising her from his mind? Was the whole thing a male fantasy?" We don't know Saura's intent, but we won't soon forget the heart-pounding staccato music and dance.

Bolshoi's Maya.

The Russian film, Carmen Suite, features the Bolshoi Ballet with Maya Plesitskaya as Carmen in a modern dance style, utilizing Bizet's music, adapted and modified by Rodion Shchedrin. The forty-five minute rendition is unfortunately marred in the video's technical translation ("envelope" is wider but not as high), resulting in our occasionally losing the dancers off the edges of the screen. Set in a mock arena, with look-alike spectators and a uniformed judge sitting atop the surrounding wall, one is thus initially placed in a regimented society prepared to disapprove of any kind of social non-conformity. And Carmen does not conform, either in dress, movement, attitude or expression.

In contrast, José is compliant, neatly uniformed, goose-stepping to the magistrate's commands. Dancing about, Carmen slowly awakens him, turning his inhibited stiffness into fluid, intimate joy. Offered a mask (of social conformity?), Carmen rejects it, causing her arrest by the magistrate, who also desires her. José tries his best to take her to jail, and she is amusingly exasperating in her digressive and distractive non-compliance. After all, short of using threats or actual force, how does one make a spirited woman do something she does not want to do? One feels compassion for José, unable to solve his dilemma.

Escamillo, conversely, "floats" as he strides across the stage, adored by all. Soon we are shown Carmen caught in the visual triangle formed by the three men. The figure of fate, dressed in black, dances in to show us the predicted future. The four meet in the arena: Carmen and Fate (now the bull) dance alternatively with Escamillo and José in simultaneous-contrasting actions until Carmen is stabbed. She lovingly caresses her Jose's face before collapsing in death. One wonders if the ideology of the then socialist state was well served with images that seem to evoke more sympathy for José-Carmen than bullfighter-magistrate. That is my perception: maybe the Russian audience didn't see it that way.

Peter Hall and the Glyndebourne Opera.

Considering all the foregoing diversity, the English "Carmen" by Peter Hall and starring Maria Ewing is a quite traditional performance of Bizet's original work. Filmed at the rather small Glyndebourne theater, this three-hour performance is not a motion picture but rather a videotape of the performed opera. Gone are Rosi's fancy camera movements, spirals and zooms -- we occasionally are given extreme close-ups, but mostly are shown broad views in a box-like though versatile stage set.

We watch Sir Bernard Haitink and his baton while the orchestra plays overture and interludes. We listen to highly-trained operatic voices give us arias and choruses while singers essentially stand fast in their places rather than moving about and acting out, as in the other films. But then, one basic difference between opera and motion picture is that singing has priority over acting. Another is that while movies are young and open to innovation and technology, opera is highly bound by conventions accumulated over centuries. Consequently, the opera is here presented both in its entirety and in Bizet's intended order, accounting for the additional length as well as increased information and character development.

For instance, in the first act, the audience learns more about José's past, his mother's adopting of Micaela, Carmen's sly insinuations, as well as the fact that she initiates flirtation with José's commander, Zuñiga. Rosi had not shown us any of these. In Act Three, Carmen and her two gypsy friends sing enthusiastically about their forthcoming seduction of the customs officers so that the smugglers will be able to slip through the pass -- Rosi doesn't show us that, either.

This trio and dialogue is absent from all recent Carmen films: in this operatic version we get a more complex Carmen and a deeper anguish from José, as he points to the valley and talks about his dying mother still believing him to be honest, moral and reliable. Since many modern persons who "know Carmen" will have seen movies but not the Libretto or a full version of the Opera, it

becomes apparent they cannot know the Carmen Bizet created, and therefore his apparent intent. Instead, they know the Carmens "adapted" by other directors.

Maria Ewing's Carmen (along with Rise Stevens'?) is perhaps the least likeable, the most diabolical -- she shows a moody, calculating coldness. Relationships are transactions, and it is much easier to sympathize with and have compassion for José's anger, frustration and desperation, despite his continuous need to make wrong choices. Costumes and sets are designed primarily in brown tones, perhaps suggesting the overall "ashes-to-ashes, dust-to-dust" theme? It is no surprise that Ewing's New York performance of Carmen drew rave reviews: it is a traditional Carmen fulfilling general expectations: the voluptuous seductress, the Old Testament epitome of the female-evil stereotype so many viewers demand.

Wendy Corbett and the illustrated Libretto.

Another interesting development occurred in 1987 -- an adjunct to opera in general, but still involving Carmen. The Royal Opera House in Covent Garden, England, published a series of illustrated operatic libretti, including The Magic Flute, Madam Butterfly, and The Flying Dutchman. Carmen is by Wendy Corbett, with a "Classic Comics" quality since both lyrics and dialogue, in English translation, are given to the reader in the form and layout of colored cartoon strips.

It makes comprehension easy in our days of diminished reading abilities, and at the same time, provides one more Popular Art through which Carmen can be told. However, it is different from reading the libretto, the words written by the librettists in the 1870's. There, one creates one's own visual image of the respective characters, with mind's eye responding with mental pictures to the stimulus of the printed words.

Here, Wendy Corbett draws pictures for us, and we have our thinking pre-programmed with a young, pleasant face with blond hair for José, and a dark, rather hard-looking, leggy, full-breasted, not-terribly pretty Carmen with a very noticeable "beauty mark" near her eye. Micaela, in contrast, is also blond, has a pretty face and a winning smile, and whatever alluring sexual characteristics she might have are given no prominence. Escamillo, like Carmen, is also dark, with flashing eyes and slicked-back hair.

It raises interesting questions. Where is Bizet? Are these stereotypes? Are they racial or physical formulas which serve as shorthand symbols for personality types? Or are we being given Wendy Corbett's personal interpretation, her own visualizing of what she thinks are appropriate physical attributes to characterization synthesis? As usual, the "true" story line becomes subordinated both to the author's purpose and the requirements or imperatives of the art form.

More Recent Ballets.

Among newer Carmens also exist, the South African choreographer, John Cranko, who became Ballet director for Stuttgart and then Munich in the 1960's, established a fascinating focus on Carmen as a member of the rejected Gypsy minority and who sought her revenge on society, certainly a historical truth, if not a direct allusion to their extensive though less-well-known Gypsy "holocaust" genocide by Nazis in World War II.

Veteran dancer Ruth Page, whose "Carmen Ballet" debuted in Chicago in 1937 as "Guns and Castanets," reworked that ballet which then ran from 1959 until 1964. She created a performance with the Dance Theater of Harlem in 1976, showing clearly the possibilities of African-derived music. In 1990 she took it to Tulsa, Oklahoma, playing to a most appreciative audience. As yet, however, no film of any of her "Carmens" seems to have been released.

Operatic Adaptation to Spain's Civil War.

A recent adaptation by Frank Corsaro and the New York City Opera opened in August, 1990.

Corsaro changed the setting: the context is no longer the Napoleonic invasion, but rather Spain's Civil War, where defeat of the legitimate Republican Government meant the rise to power of insurrectionist Fascists under Dictator Francisco Franco. However, in 1936 Seville was pro-Franco -- we have a lineup of rebel Fascists in control of the city and immediate surroundings, while Carmen is a Republican Loyalist, whose party holds control in most other places. The complicated turnabout is confusing.

In the original story by Merimee, the smugglers were not interested in overthrowing governments -- they merely wanted to avoid paying taxes. In this 1936 version the smugglers become gun-runners trying to get arms into the hands of the supporters of the legitimate Republicans who have been ousted. Carmen is therefore only an outlaw in the eyes of the Fascists -- themselves outlaws because of their revolt against a duly-elected government. José is a Fascist soldier who must arrest the weapon-smuggling Carmen, and who must desert his political cause to run off with Carmen after killing Zuñiga.

The question here becomes, "Have we more concern with political causation or with romance?" In older Carmens the answer is, "the romance," and the story focuses on love while José going AWOL seems only a tangent issue. But here, the balance is different -- there is a war from 1936 to 1939, and its veterans still live, even in the United States, which sent the Abraham Lincoln Brigade to Spain to help the Republicans. (In this one we are closer to the audience impact of Merimee's original novel in 1845, with Peninsular War veterans still alive.)

Carmen and José are political opponents; she is on the losing side, while he is originally with the winners and switches. When Micaela and Mother plead with José to return, is their anguish less that Carmen is evil and more that she is "the Republican enemy, the Communist enemy?" When José smuggles guns and ammunition has he not joined the enemy, turning his back on the Right Cause? There are similarities here with the Boshoi Ballet -- politics and love/lust.

Thus, when José kills Carmen at the finale, can his motives be perceived as the same way as more traditional versions? The historical adaptation is both interesting and useful, but not likely to reproduce the "same work in another place and time." An arts imperative exists, and also a historic and a location-context imperative. Adaptations and reframings will always be unique.

Carmen on Ice.

Another highly promoted version with a 1990 debut was "Carmen on Ice," filmed in 1989 in Seville, using portable rinks with artificial ice, and hiring local folk for the crowd scenes. The stars, who had all participated at the 1988 Winter Olympics "Dueling Carmens" at Calgary were Katarina Witt as Carmen, Brian Boitano as José, and Brian Orser as Escamillo.

However, with no Micaela, no García and only mini-roles for Pastia and Dancaire, one can guess that the story line would focus on the love triangle rather than contrasting female purity with sensuality or the struggle between smugglers and soldiers. Story-telling with ice skates makes the viewer rely on movements, gestures, possible symbols and acting ability of the skaters to create the characterization and character development.

Neither happens. The characters are two-dimensional, skating is uninspired, choreography is uncreative and the story of Carmen gets lost in the skates. José is a sad-sack with two emotions, anger and sadness. Even when he has it made with Carmen, he seems not to believe it himself, and therefore, how can we? Carmen and Escamillo skate, having neither personality nor character development. The final bullfight evokes laughter -- everything else has been on skates and in period costume -- but the bullring bit is live, "real" and now!

One scene is clever, well-choreographed, and encapsulates the theme of a competent woman unfortunately choosing a stupid man. When Zuñiga orders José to take Carmen to jail, José picks up a rope, ties her hands and starts to pull. The rope works both ways; she pulls back -- who is on the leash? The way it ends, Carmen escapes, José becomes entangled and Zuñiga demotes him.

While not plagiarised, director and choreographer must have watched many other films. One is repeatedly reminded of scenes in Peter Brook, Francesco Rosi and the Alonso Ballet. With so many differing styles, the whole thing never comes together. I felt this film was rushed to capitalize on the current mania for Spain, anticipating the 1992 Columbus Quincentennial.

Some Conclusions.

Many of these Carmens are commercially available. Based upon what has already been produced, there will certainly be many more, probably in many new and as-yet-unused art forms, as well as laser disc and interactive computer technologies. Older Carmens beget younger Carmens who beget newer Carmens. The arts interpret life and often serve as models upon which some people pattern their lives, which in turn serve as life-experience on which later artists will create new commentary, and so on.

Things may change as people learn that Carmen is always unjustly blamed for José's downfall and is always killed. Might we see Carmen avoid past fate and run off with a good-looking, well-heeled and non-abusive Escamillo as in A Fish Called Wanda? Or a counselled Carmen, with José rehabilitated for his anger and mother-fixation? Carmen and José could go to trial with both male and female attorneys. Carmen might teach sex education in schools, have to deal with multiculturality, or explore various religions in her afterlife. She could enlist and deal with sexual harassment. She could be an illegal alien, gay, get pregnant, or contract AIDS. These would push the social tragedy.

Carmen has significance. The interaction we perceive in Carmen, José and the others hits deep, emotionally, at karmic level. The evolution of our cultural conditions, historical past and written interpretation are vital to us in at least two ways. First, they are powerful, triggering visceral reactions:

1. to the circumstances of men and women,
2. to the problem of good versus evil,
3. to expected gender roles and behaviors,
4. to the complexity of love-sex-marriage-divorce,
5. to conditionings influencing our reactions,
6. to the responsible making of choices,
7. to the rights and responsibilities of humans, and
8. to the establishment of global principles for social justice.
9. to the tolerance and understanding of other races.

Second, the many artistic renderings of Carmen are a mirror of societal ideas and attitudes which have accumulated over a long, long time. As humans we are channeled by our past. What we believe, what we value, the way we structure our society and institutions as well as how we organize the various expressions of our beliefs and values are primarily inherited and conditioned phenomena; they are not new ideas and inventions created by us. They are passed down to us.

But things are not tranquil now. We are in flux, our society groans with immigration and internal migration, changing ethnic ratios, diversifying sexual orientations, increasingly revisionist politics, and an ever accelerating velocity of technological change.

We can and do change, we can and do modify, and since we have already reinterpreted, we can learn to reinterpret even more. More often, however, we take the easier path, perpetuating our inheritance without evaluating it, without examining whether we need or want to repeat yesterday's inequities.

Opera is a highly conservative art form, and in staging new productions we sometimes slavishly try to keep going back to the original and simply make the costumes fancier.

But while past concepts, beliefs, forms, images, messages, conditions, contradictions and dilemmas

clearly have engulfed us, we are also influenced by what we have not been allowed to inherit because of past societal decisions and conditions.

As the children of past generations, our thinking and defining is at the mercy of what has been allowed to filter down to us, either through deliberate choice or inadvertence. Some past truths have been totally lost, while others have survived partially in spite of extraordinary societal efforts to destroy them.

Still, history is only a literature through which we try to retell what we want to remember about the past: the original writings are not sacred, despite what some people believe, and despite efforts to sanctify them. As humans we can change the way we interpret. History does not require that we perpetuate all of humankind's past habits. Perhaps Carmen and her many updates can well serve us as teacher and humanistic guide.

PS. We are clearly not done yet -- this chapter will have to be CONTINUED as more Carmens appear! Do YOU want to write one?

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student exchange

Editor's Note: Listservs provide an abundance of useful information for producers and consumers of distance learning. This information on "Student Perspectives" was provided by Calli Shelton on Mon, 18 Feb 2002 on the DEOS Listserv. These resources provide insight and dimension to each side of the distance learning triangle - students, teachers, and designers.

Student Perspectives

Calli Shelton

1. "Persistence in Distance Education," Peter Cookson, http://wbweb4.worldbank.org/DistEd/Teaching/Design/kn-01.html

2. "A Study of Variables that Predict Dropout from Distance Education," Angie Parker, Gonzaga University, http://www.outreach.uiuc.edu/ijet/v1n2/parker/

3. "Student Support Online Through Thoughtful Course Design," Cheryl White, Grant MacEwan College, http://as1.ipfw.edu/2000tohe/papers/white/index.htm

4. "How to Keep E-Learners From E-scaping," eLITE Think Tank

5. "As Distance Education Comes of Age, the Challenge Is Keeping the Students," by Sarah Carr, The Chronicle of Higher Education, Feb. 11, 2000, http://chronicle.com/free/v46/i23/23a00101.htm

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TECHNOLOGY EXCHANGE

Amnis Systems Selected for University of Alaska Distance Learning Project

Amnis (formerly Optivision) network streaming video products expand educational opportunities for students in remote locations.

Palo Alto, Calif., February 13, 2001 - Amnis Systems Inc. (OTCBB:AMNM; Frankfurt: ANI), a leading global provider of networked streaming video systems, today announced that the University of Alaska has deployed Amnis streaming video products for a distance learning project. The project will ultimately connect multiple University sites including the University of Washington utilizing a broadband IP based network. Students and teachers benefit through increased and timely access to education and training without leaving their current school location.

The initial distance-learning network will transmit educational content from the University of Washington's Research Channel via a satellite link to the University of Alaska in Fairbanks. An Amnis network attached NAC(tm)-3000 live streaming server appliance captures, compresses and streams the video content via the satellite transport channel to an Amnis network attached NAC4000 receiver. Future plans will add remote classroom support for the University of Alaska locations in Anchorage and Juneau utilizing OC3 broadband wide area network links. These sites can easily be added to the network using the Amnis distributed network video architecture, which includes network attached streaming video appliances, desktop software-only players and SNMP compatible network management software.

"Amnis Systems provided the necessary integrated hardware and software infrastructure required for streaming high-quality video to our University of Alaska campuses," said Steve Smith, Chief technology Officer of the University of Alaska system. "We chose Amnis NACs over other solutions because of the high-quality full motion video and ease of installation. In addition, their products are interoperable with network and video industry standards such as IP and MPEG."

"The education community has embraced the benefits of interactive distance learning," said Rich Falcone, Vice President of Worldwide Sales and Marketing for Amnis Systems. "High-quality etworked video facilitates expanded learning opportunities for students, as well as enhanced revenue opportunities for schools."

About Amnis Systems Inc.

Amnis Systems Inc. (OTCBB: AMNM), formerly Optivision Inc., is the dominant market leader in the networked streaming video market for enterprise applications. For more information, visit www.amnisinc.com or phone 1-800-239-0600.

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Safe Harbor' statement under the Private Securities Litigation Reform Act of 1995:

This release contains forward looking statements based on currently available information which management has assessed but which is dynamic and subject to rapid change due to risks and uncertainties that affect our business, including, but not limited to, the impact of competitive products and pricing, limited visibility into future product demand, slower economic growth generally, new product development, fluctuations in operating results and other risks detailed from

time to time in the company's filings with the Securities and Exchange Commission.

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TECHNOLOGY EXCHANGE

GeoLearning Metadata:

Learning Objects & Live eLearning

Traditionally, metadata is defined as data about data, or information about content that allows it to be stored in and retrieved from a database. Consider this example: A library card catalog in which the information about library books (data) is found on the catalog card (metadata). In terms of eLearning, the card catalog is the metadata and the library books would be the learning objects used to teach a course.

Building Courseware with Learning Objects

This month, we wanted to learn more about learning objects, so we visited with Karen Massetti Miller, director of courseware development at GeoLearning. Karen oversees GeoLearning's courseware development division, where she develops Web-based training courses, repurposes instructional materials for online delivery, and conducts application training for clients via the classroom and live webcasts.

Q: Define a learning object.

A: This is a tough one, because there are about as many definitions of "learning object" as there are developers. Some see learning objects as fairly small—an individual graphic or paragraph of text. Others see them as large enough to encompass an entire course. At GeoLearning, we regard a learning object as a reusable module of learning that consists of objectives, course content, graphics, a closing summary and a quiz. This module can stand on its own as a very short course or be combined with other modules to create a larger course.

Q: How do GeoLearning's instructional designers use learning objects?

A: We use them as the basic building blocks of the SCORM-compliant courses we develop.

Q: Are learning objects "here to stay" or are they just a fad?

A: Learning objects are here to stay, but they might not be the solution for every learning situation. Learning objects work well for courses that are primarily tutorials. But they may not be as effective for other types of courses such as those that take on a game format or courses that use a full-simulation format in which the user makes choices and then deals with the repercussions of those choices.

Q: Can a learning object be physical, such as text or a workbook, or just online, such as images or Java applets?

A: This takes the definition of learning objects a step further than most people do by moving it beyond online learning to include any piece of instructional media that can stand independently. This may not be the best use of the term "learning object," as it might make the definition a little too broad to be useful.

Q: Do developers have to think up learning objects every time they create a course?

A: No. Many learning objects can be reused in different courses. As a courseware library grows, more reusability occurs. Hence we have the term reusable learning objects.

Q: Some argue that the world doesn't need tens of thousands of similar learning objects, but that a dozen well-designed objects could be used in thousands of courses. Can you explain this concept?

A: This is kind of like asking whether all human knowledge can fit on the head of a pin. A dozen well-designed objects on the right set of basic topics could certainly be reused many, many times. But we'd probably all get tired of them after a while and want to see the material presented in a different way. So then we'd need some new learning objects on the same topics.

Q: Can learning objects be shared?

A: As SCORM standards become more prevalent, we may see learning objects being shared widely within the courseware and education industries. SCORM (Sharable Courseware Object Reference Model), is a set of standards that produces reusable learning objects.

Q: Can learning objects be assembled by independent students to create a course relevant to their own needs?

A: Absolutely. Some developers are doing this already. Expect to see many more courseware developers doing the same in the near future.

Live eLearning with GeoConnect

Whether you are rolling out a new product, turning classroom training into live online training, captivating the attention of your clients, or holding a meeting across your supply chain, webcasting makes live interactive knowledge transfer simple and effective.

GeoLearning makes webcasting possible with GeoConnect, our new webcasting tool for live eLearning and business collaboration over the Internet.

GeoConnect is an interactive experience and a superior way to get co-workers, peers and partners together at lower cost. Webcasting facilitates collaboration in ways simply not possible with e-mail, chat or groupware. The technology also allows organizations to integrate these live interactions with key business processes such as selling, service, marketing and training.

Companies in virtually every industry have embraced the Internet as a robust, ubiquitous platform for live collaboration. This is because webcasting technology adds value by:

- Eliminating the expenses associated with live gatherings, telephone conferences and document distribution.
- Disseminating data and learning quickly and efficiently, providing users with just-in-time access to information.
- Increasing revenues by rolling out new products faster, conducting virtual sales and marketing, and providing support for other client-facing events.
- Improving the ability to interact with clients on a high-touch basis, maximizing satisfaction, loyalty and retention.

To learn more about GeoConnect, visit www.geolearning.com/main/products/webcasting.

New LMS Customers

GeoLearning's newest learning management system clients include Millennium Chemicals, CCA Global Partners and Brokers International.

Millennium Chemicals is the world's second-largest producer of titanium dioxide, a bright white powder that is a crucial ingredient in coatings, paints, plastics, and papers. The chemical giant signed a 2-year agreement and will be implementing the Geo Learning Center to manage eLearning.

CCA, the Carpet Coalition of America, is the largest carpet operation in the U.S. with 1,500 outlets. They own such companies as CarpetOne, GCO Carpet Outlet and Flooring America. They will be rolling the GeoLearning eLearning solution out to franchise owners nationwide.

Brokers International will be implementing the GeoExpress eLearning platform in response to increasing demand for online insurance certification online, as well as the opportunity to reduce travel expenses for corporate trainers.

Online Content

GeoLearning also added two eLearning courseware customers. R.H. Donnelley, one of the largest independent marketers of Yellow Page advertising in the United States, and the R.H. Barringer Distribution Company, a North Carolina-based distributor for Anheuser-Busch, will both be launching eLearning initiatives with online business skills, career development and computer training courses.

New Partnerships In a distribution agreement with MaxIT Corporation, GeoLearning can offer clients interested in content development software the DazzlerMax solution, an award-winning authoring tool that enables users to develop highly sophisticated and interactive learning content with no scripting, no plug-ins and no royalties. The DazzlerMax tool can be used to develop standards-compliant content that can be easily launched, tracked and reported on using the GeoLearning LMS.

GeoLearning has also integrated more than 300 hours of AICC- and SCORM-compliant courses from the PrimeLearning.com library into its LMS. The library encompass a wide range of business skills in 17 curricula such as management, writing and communication, project management and customer service, as well as strategic business subjects including call center and tele-skills, marketing and sales.

From: Velocity <velocity@geolearning.com>

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STATE AND INTERNATIONAL EXCHANGE

International Conference on Technical and Vocational Education and Training

Canadian Vocational Association and UNEVOC-Canada.

DEVELOPING SKILLS FOR THE NEW ECONOMY

October 17-19, 2002, Winnipeg, Manitoba, Canada

The Canadian Vocational Association and UNEVOC-Canada will co-host an International Conference on Technical and Vocational Education and Training (TVET) in Winnipeg, tentatively set for October 17-19, 2002. The conference will focus on DEVELOPING SKILLS FOR THE NEW ECONOMY.

Call for Papers and Workshop Presentations

Our society is continuously moving towards a knowledge-based economy: an economy in which the application of knowledge replaces capital, raw materials, and labor as the main means of production. The synergy of combining new information and communication technologies with human skills has dramatically altered job content and skills requirements at the workplace. Good jobs have become technologically complex and are demanding sophisticated work skills. Simple, routine and low-level functions are diminishing. The perception of the role of human interventions in the economic transactions has also changed. The potential contribution that an individual can make in acquiring and applying knowledge for improving processes, products and services is becoming more important than the physical labor. The knowledge embodied in a product has become a key element of production.

To engage all key stakeholders in a discussion regarding skill development for the New Economy, the Canadian Vocational Association (CVA) and UNEVOC-Canada, the Canadian Centre for UNESCO's International Project on Technical and Vocational Education will co-host an international conference, DEVELOPING SKILLS FOR THE NEW ECONOMY on October 17-19, 2002 in Winnipeg, Manitoba, Canada.

Themes

Access and Equity	Adult Education
Apprenticeships	Articulation and Linkages
E-Learning	Human Performance Technology
Indigenous People	Knowledge Management
Learning Partnerships	Skills Gaps

Sustainable Development	Teacher Education

In order to provide a forum for both theory and practice in Technical and Vocational Education and Training, this conference will allow for both paper and workshop presentations. Paper presentations will focus on research, policy initiatives and case studies. Workshop presentations will highlight best practices, exemplary accomplishments and programs, innovative approaches, strategies and emerging trends in technical and vocational education and training.

Paper Presentations

We are accepting abstracts for oral and symposium presentations dealing with research, policy initiatives and case studies in technical and vocational education and training.

ORAL presentations will be forty minutes in length in a one-hour time slot to allow for presenter-audience interaction.

SYMPOSIUM presentations will consist of groups of four papers on a consistent theme that will be presented in a two-hour time slot.

Abstract Requirements

Abstracts should be no more than 150 words. All submissions will be acknowledged with an email upon receipt. All abstracts must be received by February 28, 2002.

Abstract Submission

You may submit an abstract via one of the following methods:

1. Web: Complete the online Proposal Cover Sheet Form-WEB http://www.umanitoba.ca/unevoc/2002conference/papers/form.html. Do not forget to paste your abstract on the text box at the bottom of the form.
2. Email: OPTION 2a: Download the Proposal Cover Sheet Form-WORD http://www.umanitoba.ca/unevoc/2002conference/papers/form.doc. Complete, save, and email the form as an MS Word attachment to unevoc2@ms.umanitoba.ca; or
   OPTION 2b: Copy and paste the text in Proposal Cover Sheet Form-TXT http://www.umanitoba.ca/unevoc/2002conference/papers/form.txt in the body of your email message. Complete and email the form to unevoc2@ms.umanitoba.ca. Please indicate 2002 Conference Abstract (Paper) on the subject line.
   Conference organizers will notify all prospective presenters regarding the status of their abstracts by March 15, 2002.

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Workshop Presentations

We are accepting abstracts for workshop presentations dealing with best practices, exemplary accomplishments and programs, innovative approaches, strategies and emerging trends in technical and vocational education and training. The suggested workshop presentation duration is fifty

minutes long in a one-hour time slot to allow for presenter-audience interaction.

Abstract Requirements

Abstracts should be no more than 150 words. All submissions will be acknowledged with an email upon receipt. All abstracts must be received by February 28, 2002.

Abstract Submission

You may submit an abstract via one of the following methods:

1. Web: Complete the online Proposal Cover Sheet Form-WEB http://www.umanitoba.ca/unevoc/2002conference/papers/form.html. Do not forget to paste your abstract on the text box at the bottom of the form.
2. Email: OPTION 2a: Download the Proposal Cover Sheet Form-WORD http://www.umanitoba.ca/unevoc/2002conference/papers/form.doc. Complete, save, and email the form as an MS Word attachment to unevoc2@ms.umanitoba.ca; or OPTION 2b: Copy and paste the text in Proposal Cover Sheet Form-TEXT http://www.umanitoba.ca/unevoc/2002conference/papers/form.txt in the body of your email message. Complete and email the form to unevoc2@ms.umanitoba.ca. Please indicate 2002 Conference Abstract (Workshop) on the subject line. Conference organizers will notify all prospective presenters regarding the status of their abstracts by March 15, 2002.

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STATE AND INTERNATIONAL EXCHANGE

Georgia GLOBE Models Efficient Approach to Statewide Distance Learning

Higher education rarely does market research. At best we wet our finger to see which way the wind blows," assesses Richard Skinner. Skinner is President of Georgia GLOBE, short for "Global Learning Online for Business and Education." His enterprise, a division of the University System of Georgia, is unique in the academic world because everything they do is driven by market research.

The GLOBE is an aggregator and marketing portal with the mission of promoting distance learning from the 34 institutions within the University System of Georgia (USGA). The GLOBE is not a virtual university. It awards no degrees. Everything in its catalog comes from one of the state's residential campuses. "We provide our 34 institutions with the power and number to compete with a growing for-profit sector," explains Chris Cameron, Vice President of Marketing and Communications. "Our goal is to drive learners to our institutions."

Since when does a state university system need an integrated marketing campaign? Since the Net made geographically bound markets less reliable. According to Cameron, new for-profit schools have targeted the population dense and education eager Atlanta area. Up to four pages of advertising appear from these schools in weekend editions of metro papers. The GLOBE helps by advertising the statewide university system, lending leverage to local university brands. "We've found somewhat on a statewide basis that within our 34 institutions people still tend to migrate to institutions that are known in their local area," explains Cameron.

Founded in 1999, the GLOBE has enlisted market research to uncover the answers to crucial questions. "Our first big question was who are our distance learners?" comments Skinner. "We asked ourselves, were distance learners a distinct group from our other college students?"

The GLOBE discovered that distance learners in Georgia are indeed different from residential learners. Moreover, they discovered that distance learners are different from each other. Suburban-dwellers live close to urban areas and tend to be well educated. They know the advantages of education and are motivated and able to access education via a PC. Convenience motivates them to abandon the residential campus in favor of online learning. This group often lives near campuses, but they prefer not to fight metro traffic.

Georgia's second group of distance learners does not follow any geographic pattern. They tend to be young women, typically from a lower socio-economic status, often under 30. They need distance learning to overcome real-life problems, like childcare and juggling career, family and educational tasks simultaneously.

The third and final group has, according to Skinner, posed the greatest challenge to Georgia's higher education institutions and GLOBE's marketing efforts. "These are people in rural areas,

often employed in dying traditional industries like wood and furniture. They are employed in dying industries with no local college access."

Identification of these three groups has allowed the GLOBE to cherry-pick the best media channels and messages for letting learners know what the statewide university system has to offer. Not surprisingly, different demographics have responded to different media channels.

"For African-Americans in the Atlanta and metro areas, radio has a lot of clout," reveals Skinner. "There is a stark contrast between Atlanta and the rest of the state. People outside Atlanta have little experience with education and do not read newspapers. Elearning is foreign and alien to them. We have not been as successful as we'd like reaching these people. They are not tech savvy." Many rural homes remain offline. Skinner sees Internet workplace penetration as a dominant factor pushing rural populations toward online educational opportunities.

Among the GLOBE's programs, one ranks as the most popular. "One third of our inquiries, of about 4000 inquiries last quarter, were for our WebMBA," reveals Skinner. In addition to being the most popular program, the WebMBA is one of Georgia's most efficient online offerings. The program is jointly developed and taught by five University System institutions: Georgia College and State University, Georgia Southern University, Kennesaw State University, State University of West Georgia, and Valdosta State University. Applicants apply to one institution but take courses from all five before earning their degree from a chosen "home institution."

Research revealed that the largest single demand for Web-based degrees in Georgia occurs at the graduate level and in business and technology areas. "Our WebMBA could be priced at a gazillion dollars and still fill up," predicts Skinner. Demand for entry is thus far outpacing the limited number of seats available each term. Master's in engineering, quality assurance, and computer science are in development.

Skinner, who has a long history in university administration, having previously served as President of Clayton State, points to the WebMBA as "a new model of efficiency" for higher education. "Historically each course is hand-made. And that is a very expensive way to make courses." With the WebMBA one campus will create an ecourse. Other campuses may enroll students in these courses online.

The GLOBE's newest project was, not surprisingly, born of market research. A 1999 study prepared by the Georgia Tech Research Corporation sounded an early warning alarm that Georgia would face a severe shortage of IT workers if the state did not intervene. To address the problem, the GLOBE arranged for KnowledgeNet, an online Phoenix-based IT training firm, to channel their courseware, which is tied to popular private vendor certifications from Cisco and Microsoft, online through 19 of the University system's local campuses.

The project, labeled "Georgia Gets IT," allows even the smallest colleges in the statewide system to offer IT training online. Cameron reports that KnowledgeNet was chosen because they offered a turnkey system that all colleges could access. "The content was there. The infrastructure was there. They built a private label system for each campus." By using KnowledgeNet each campus avoids worries about hosting, technical support, keeping content up-to-date, and handcrafting content to meet private vendor certification needs.

eCore is perhaps the GLOBE's most controversial program. Skinner reports that some faculty have resisted the idea of eCore. Unlike many distance programs, which focus on putting the last two years of the bachelor degree online, eCore offers freshman and sophomore core courses. English, history, math and political science are among eCore offerings.

"Selling Ecore has been hard. Colleges say they [students] need to come to campus to get these crucial entry skills." Nonetheless, eCore grows. Skinner sees this program as another lesson in "future efficiencies." He points to the fact that Georgia stands fifth in the nation in K-12 enrollments. "We're facing a tidal wave of traditional university students. We have a long-term issue of capacity. The hope is that eCore can help us expand educational capacity for all students."

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Western States

Western Cooperative for Educational Telecommunications

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- Darcy Hardy, University of Texas Telecampus, on managing the e-learning environment.
- John Witherspoon, San Diego State University, on assessment and planning.
- Sally Johnstone, WCET, on e-learning trends both nationally and internationally.
- Cliff Moore, Washington State University on student services for e-learners.
- Norm Coombs, EASI, on accessibility for those with disabilities.
- Steve Crow, Higher Learning Commission, on expectations of accrediting agencies.
- Georgia Harper, University of Texas System, on copyright and intellectual property issues.
- Anne Moore, Virginia Tech, on new ways to think about the faculty/technology relationship.
- and several more, plus an increased opportunity to learn from your fellow participants.

Known as a ski mecca, Park City hosts a wide variety of summer recreational opportunities, as well. Come join us at MDE. For more information, go to http://mde.wcet.info/ or contact Russell Poulin, Associate Director, WCET rpoulin@wiche.edu, 303-541-0305.

EDUCATION at a DISTANCE

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STATE AND INTERNATIONAL EXCHANGE

World Bank's Global Development Learning Network: Sharing Knowledge Electronically Between Nations to "Fight Poverty"

George Lorenzo

Colleges and universities with strategic plans or serious intent to take their research and expertise to the developing world and beyond, as well as become part of some meaningful knowledge-sharing with other institutions and organizations across the globe, can look into the possibility of doing business with the World Bank's Global Development Learning Network (GDLN). GDLN operates one of the largest, most sophisticated and cost-effective satellite-driven global communication systems to cross international borders.

Building DLCs In addition, GDLN is quickly building a large worldwide network of independently owned and operated Distance Learning Centers (DLCs) that are being utilized by private and public organizations and institutions. DLCs typically consist of a multimedia room with computers with high-speed ISDN or fiber-linked Internet access, along with a videoconference room equipped to receive and deliver learning programs around the globe, all capable of connecting to the GDLN global communications system.

These DLCs are the hubs for teaching and learning, providing the classroom facilities for holding far-reaching distance education and knowledge-sharing programs. Since launching in June 2000, GDLN has helped to build and/or established partnerships with 31 DLCs located in six regions: Africa, East Asia and the Pacific, Europe and Central Asia, Latin America and the Caribbean, the Middle East and North Africa, and North America. Eighteen of these centers have been financed in poor countries through no-interest loans sponsored by the World Bank. The remaining DLCs are within institutions and organizations that already have the facilities and technological infrastructure for connecting to GDLN.

The distance education programs being offered over the network include web-based courses, seminars and workshops by video conference, and learning activities that are a combination of both web and video conferencing. Printed materials, CD-ROMs, and/or face-to-face instruction often complement many of the programs.

More than 80 percent of the programs are offered by the World Bank Institute (WBI), which is the learning arm of the World Bank. However, according to the GDLN website, "GDLN carries learning programs drawn from a variety of public and private sources. They cover the full range of development issues from AIDS education to anticorruption strategies, from environmental compliance and enforcement to business journalism, and from macroeconomic policy to urban development."

"It's quite a large network and it's growing even farther," says WBI's Director of Global Learning John Middleton. "The size of the network is such that there's a huge opportunity for institutions to use the network to provide learning programs, and the use of the network is very low cost." As an example, Middleton explained that it would cost about $2,000 for two hours of video conferencing transmitted to five DLCs located around the world with an approximate total of 150 classroom participants or more.

A Worthy Vision As stated on the GDLN website, the organization's vision "is for decision makers across the developing world to have affordable and regular access to a global network of peers, experts and practitioners with whom they may share ideas and experience that will help them in their work: to fight poverty."

The audience for GDLN programs is primarily adult professionals who are "senior policy makers and decision makers who work in institutions and are in a position to effect change in their country," says Joan Hubbard, WBI's senior partnership specialist for the Global Learning Department.

Altruistic Propensities For the time being, GDLN's partners are not involved in the program for monetary value, but instead have altruistic propensities to help developing countries fight poverty and share in a truly global exchange of valuable information. However, partners do see working with GDLN as a beneficial process to test market their learning programs to different cultures and find out what kinds of knowledge can really be shared with developing countries. Additionally, involvement with GDLN helps institutions and organizations build international contacts and relationships that they may not have had the opportunity to develop otherwise. Plus, says Middleton, "you don't have to erect infrastructure because the infrastructure is already there."

North American institutions, for the most part, have been slow to react to GDLN. Part of the reason why is that, during its beginning phase, GDLN built relationships with WBI's already well-established partners in foreign countries who had an interest in distance education, says Middleton. Additionally, "the Europeans (for example), are more centralized and better able to make the link between the government and higher education. In the decentralized environment inside the United States it is a little more difficult to mobilize the kind of support for the institutions that we have been able to achieve in other countries."

As a possible spur to action, Middleton mentions that U.S. colleges and universities could try contacting the United States Agency for International Development (USAID) to possibly obtain financing for the development and delivery of U.S. higher education's knowledge base through the GDLN's DLCs to enhance development assistance and knowledge sharing with foreign countries.

University of Alberta Taps CIDA In Canada, for instance, the Canadian Industrial Development Agency (CIDA) recently contributed $5 million (Canadian) to the University of Alberta (UA) to help set up a DLC in Bosnia under GDLN. The new center, which brings in a partnership with the University of Sarajevo, will initially offer distance learning programs that focus on public and private-sector business management issues in the Balkans. "From CIDA's point of view it is a vehicle to do development in a slightly different way," says Terry Mackey, UA's Director of International Programs.

"We made the approach to CIDA," Mackey continues. "It's something that we put into a proposal to CIDA, and they accepted it. I think they see the potential for using electronic learning in international development work."

Since UA has a major strategic initiative and commitment to the internationalization of its educational programs and research, GDLN brings an added dimension to help facilitate joint programming, says Mackey. "We see the possibilities for two-way processes. . . There is a lot of debate and discussion going on globally, and the potential for actually getting the researchers who are right at the front of the debate in contact with policy makers through video conferencing has enormous potential. So, from a university point of view, it is actually using what we do well, which is our research agenda, and making it more accessible to a much wider range of people."

U.S. On Board Institutions in the U.S. are also staring to see the potential. "As soon as we start talking about the benefits of bringing some global experience into their domestic programs, the lights go on," Hubbard says. "We recognize that institutions, particularly in the states, have to cover their costs, and we work very hard with them to ensure that they understand that they are not going to recover their costs in their first offering. But, if they look at this as a long-term relationship over a couple of years, they are going to more than cover their costs," she claims, adding that institutions will reap the benefits of participating in content building activities that will eventually gain acceptance over a wider worldwide network. "They (U.S. institutions) also know that we are the cheapest game in the international town. There is nowhere else they are going to reach these countries at rates that are as reasonable as our's."

MSU Moving Forward Once such institution that is investing in the future of GDLN is Michigan State University (MSU). Through MSU's relatively new Global Online Connection unit, three worthwhile distance learning programs are currently being developed for broadcast over the GDLN: a series of video conferences on the safety of organic foods, and two 16-week online courses, one in watershed concepts and another in international food law.

"All three programs have research projects internationally," says Chris Geith, director of MSU's Global Institute. "MSU has faculty exchanges with many universities around the world in these areas."

MSU has one of the largest programs in international studies in the country and is noted for being (among a long list of international education and research accomplishments) the largest recipient of USAID funding since the 1950s, as well for sending the largest number of students abroad from any single campus in the United States.

The planned watershed course, for example, will be taught by an international faculty, and it consists of local case studies and data collections from regions outside of the U.S. "We are not just exporting MSU research and knowledge to GDLN emerging countries," says Geith. "We are looking to use the network as a catalyst to work more closely with the researchers and scholars and officials in those topic areas that we already have going."

Howard University Joins Network of Networks This same practice holds true for Howard University, which is the home base for the first U.S. GDLN DLC.

In May of last year the Howard University College of Medicine, under the sponsorship of USAID and in partnership with a youth-led non-governmental organization called The African Futures Forum, along with the National Council of Negro Women, convened the first U.S.-university-based GDLN video-conference event, called the Global Youth Health Teleconference (GYHT). GYHT went over the GDLN bridge to DLCs in Benin, Uganda, Ghana and Senegal, Africa.

GYHT brought together more than 400 young people over the network who took part in a dialog on youth and HIV/AIDS, Women and HIV/AIDS, and Child Survival in their respective countries.

Luigi LeBlanc, technology coordinator for Howard University's Telehealth Sciences and Advanced Technology Center, says that the university's College of Medicine has historically built relationships and partnerships around institutions in the Caribbean and in Africa.

"The GDLN presents a cost-effective venue to provide continual training and to actually reach these partners in real time, and we have been able to, through this venture, gain new partners," says LeBlanc. "The university here is preparing its staff to offer their expertise through this network. We are partnering with institutions to help put out programs that build on GDLN's concept of building a network of networks."

Extensive Needs What kind of learning programs is the network seeking? GDLN Program Development Manager Claude Salem has put together an informational table representing the strategic priorities needed for building capacity for development in countries with DLCs. The table is divided into six broad categories of need: poverty reduction, economic management and financial sector development; governance and public sector reform; social sector and human

development; environmental and rural development; private sector development; and other.

"I think U.S. institutions can contribute quite a bit since the areas in development are areas that are represented in their disciplines," says Salem. "It's just a matter of how to package the material and how to make clients aware of the relevance of the materials."

"There are some areas that market very well," adds Middleton, pointing to learning programs in business management, health policy and education policy. Colleges and universities with an international dimension to such programs could be considered good candidates for a GDLN partnership.

"We are as open and broad and as wide in our interests as possible," says Hubbard. "You never know where there is going to be a good opportunity for content." Growth Plans

Overall, according to an excerpt from the GDLN annual report for fiscal year 2001, the World Bank, with more than 100 offices located throughout the world, "gave enhanced visibility and support to GDLN in their operational planning." Plans call for 27 more DLCs in fiscal year 2002, with a projected grand total of 80 DLCs on board by end of fiscal year 2003. "If secondary sites are included (national network sites linked to GDLN through the DLCs), the number of locations reached is expected to more than double that number (equaling 160) by the end of fiscal year 2003."

GDLN - http://www.gdln.org

World Bank - http://www.worldbank.org

World Bank Institute - http://www.worldbank.org.wbi

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Donald G. Perrin

Search for any name or keyword using Windows browser as follows:
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