Distance Education Certification Standards

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PREFACE

The Standards presented here are the result of years of work by the Association of Real Estate License Law Officials (ARELLO®), which has for decades concerned itself with quality issues in education. These Standards were designed to be applicable for courses in multiple industries. While ARELLO® maintains standards for the real estate industry, the International Distance Education Certification Center (IDECC®) was formed in 2001 to help other industry regulatory groups apply the same universal distance education standards to courses taught in their particular jurisdiction.

With the growth of distance education in the 1990s, the Association began to focus on issues relating to quality matters in distance education. After extensive research and work with distance education professionals, the Association launched the first edition of standards for distance education in 1998. Since that time, scores of courses have gone through a rigorous standards review process leading to courses *certified* for distance education design and delivery. The Standards and the certification process have been refined and continuously updated to meet the challenges and the changes in distance education.

The Standards presented here have been applied to virtually all delivery methods of distance education. The focus of the certification process is on the design and delivery and not course content. These Standards ensure that the design of the course is predicated on sound educational principles.

The ARELLO® Standards and the review process are overseen and governed by a separate Education Certification Committee within the association. The ARELLO® Education Certification Committee sets policies and procedures and establishes an independent review process to ensure that all distance education courses are examined objectively.

Background to the Standards

ARELLO® is an organization comprised of real estate regulatory officials from the United States, Canada, Africa, Asia, Australia and the Middle East. The primary purpose of the Association is to promote better administration and enforcement of licensing and regulatory laws in member jurisdictions. The major task of ARELLO® is to equip its members to fulfill their roles as regulators to properly administer licensing laws that serve to protect the public interests.

One of the primary ways that consumer interests are protected is through appropriately educating licensees. To ensure this end, regulatory agencies must assess and approve a variety of educational offerings. These courses are offered through both traditional classrooms and distance education formats. As technological advances were made, distance education offerings increased in number and variety. It became apparent that a need existed to identify

criteria that could be used to assess certain components of these courses and programs. The fact that learners and instructors are separated by distance, and sometimes by time, gave rise to concerns that may not exist with traditional classroom courses.

ARELLO® recognized the need to establish standards that can be used to review and approve distance-learning courses in the mid-1990s. At its meeting held in May 1997, the Board of Directors officially took action and approved the formation of a task force and the hiring of a consultant/expert in the distance education field. It was decided that the task force would be composed of the Chair of the Education and Standards Committee, Grace Berger from Montana; the Chair of the White Paper Subcommittee on Distance Learning, Teresa Hoffman from Nebraska; the Chair of the Technology Task Force, Pat Anderson from Alabama; and the ARELLO® President, Robert Fawcett from Vancouver, British Columbia.

David Moore, from the University of British Columbia, was added to the working group. David Moore was active in distance education at the University of British Columbia, where much emphasis was being concentrated on distance education in real estate. A second addition to the task force was Dr. Robert Meyer, Fulbright Scholar in Distance Education, who brought years of expertise in educational course design, the technologies, and distance education.

The first work of the task force was to identify the issues that must be addressed by the Standards. The real estate regulators who attended the June 1997 Real Estate Educators Association (REEA) Conference met in a working session and established an outline of the issues. The standards contained in this document are a direct result of their input and are, therefore, representative of issues faced by a broad spectrum of real estate regulators.

The Standards Task Force Founding Members

Patricia Anderson (Alabama Real Estate Commission)

Grace Berger (Montana Board of Realty Regulation)

Robert Fawcett (Real Estate Council of British Columbia).

Teresa Hoffman (Nebraska Real Estate Commission)

David Moore (Real Estate Division of the Faculty of Commerce at the University of British Columbia)

Robert A. Meyer, Ph.D. (Deceased)

2013 – 2014 Revision Taskforce Members

Ryan Adair (Alabama Real Estate Commission)

Andrea S. Alford (Arkansas Real Estate Commission)

Gail Anderson (Nevada Real Estate Division)

MiChell Bird (Idaho Real Estate Commission)**.**

Nedka P. Dineva, PhD (West Virginia Real Estate Commission)

Patricia Anderson & Teresa Hoffman reprised their roles during the revision of these Standards in 2013–2014. Teresa Hoffman was then associated with the Alabama Real Estate Commission.

IDECC and New Industries

The ARELLO® Education Certification Committee works diligently with regulatory groups from different industries who adopt the ARELLO® Standards and use the Certification Program to help provide guidance on important distance education issues within each of the industries.

WHY STANDARDS?

Distance education certainly is not new to education, but the Internet has brought increased emphasis to this educational format. We are seeing more research and interest focused on distance education. The term itself has come under scrutiny as professionals struggle to add new meaning to the terminology itself. As technology changes we are seeing new applications to delivery systems and new possibilities for virtual learning and the virtual classroom. These standards were developed to remain vital while meeting the new challenges that distance delivery and distance education face. Just as distance education has, and is, changing to keep pace with technological changes, so too have these standards changed and evolved. These standards represent years of work in research, development and application. They reflect a sound approach recognizing new advances in quality distance education design and delivery.

What is Distance Learning Education?

There is a constant flow of terminology relating to distance education. Much of this new terminology is a reflection of changes in technology, with individuals and groups eager to claim a new acronym. The basics of distance education still apply and are the underpinning of much of the terminology hype we hear and read about. Broadly defined, distance education occurs when the learner and instructor are separated by distance and sometimes by time. For the purposes of these Standards, we will continue to use the term "distance education." It is, however, acknowledged that there are a variety of terms.

While there are some educators today who argue that education is still basically the same as it has been for centuries, most will admit that delivery systems are evolving and changing. Technologies are making it possible to provide a variety of distance learning opportunities while at the same time improving the quality of education. What is important to understand is that today there are a variety of educational approaches that can be used to deliver instruction. Surveys and studies have revealed that education is currently delivered by a combination of formats and technologies: print; video technologies, audio technologies, and computer and telecommunication systems.

It appears the driving forces behind the increased use of varied formats for the delivery of instruction are fundamental changes in society combined with continued rapid technological change. With portable technology, society has become increasingly connected, impacting the learning environment. The Internet, combined with market demands, is changing the way we work, live, and learn. Older technologies are being combined with the new. We find educational delivery in a variety of modes, utilizing a variety of systems. The definition of distance education, and what it includes, continues to evolve and change.

Standards, Amid Change

The challenge we continue to face in distance education is responding to new and changing technologies and definitions. This situation is made more complex when we combine technologies. Various associations and agencies continue to struggle with standards and the accreditation process for education courses and programs that involve distance delivery. What has emerged is a realization by many that we must approach accreditation and standards in a different way.

Distance education has certain unique general characteristics. We understand that the roles of the learners and the instructors, as well as the environment itself, need to be viewed and understood differently from the traditional classroom. In that respect, we know that we must view standards for distance education within a "distance-learning context." We have realized that "interactivity" is a key part of a distance education environment. We have learned that distance education must include definitions of terms and technologies. We know that we must not lose sight of the fact that distance education must be grounded in solid educational goals and objectives. Perhaps the most important realizations are that distance education standards must be established within a framework and that evaluation is a process. Even though program specifics, course specifics, and delivery modes may vary widely from situation to situation, the evaluation process allows an individual educational entity to evaluate its efforts. These standards use a process that is commonly called a program or course review self-study. A self-study helps determine if a provider is delivering sound educational material that meets the needs of the educational provider and the learner.

Educational standards must be applied within a review process framework; yet, the flexibility allowed by a process should not lead to lower criteria. When the educational goals and objectives are stated, the educational provider must explain how the program and courses meet established goals. Distance education standards force providers to look at the parts within the broader context of goals, content, and varied technologies.

Curricula, Courses, and Distance Delivery

The heart of any distance education program is high quality course and curriculum design. The courses must meet the needs of the learners who are remote from their instructor in whole or part. We view distance education more in terms of instructional strategies. We emphasize that distance education efforts must never forget the key word, *distance*. In most distance education courses, the instructors and the learners are separated from each other. We know that this is often considerably different than the teacher in the classroom. Actually, one of the first questions one must ask in considering distance education is why? Why do we want to do this? Then ask "how?" How are we going to deliver the material remotely? Or put another way, what will be our instructional strategy?

The why and how issues are meant to underscore that effective distance education requires much planning to determine the most appropriate distance delivery strategy. Content area goals and objectives must be viewed from the perspective of, "How will any technologies used become part of the strategies to the goals?" If, for example, the overall goal is to teach sales techniques, and the strategy is to use the Internet as a delivery mode, much planning will need to take place. In such an example, good planning would raise several questions. The basic one would be: "Is the Internet the appropriate distance delivery strategy for such a course?"

A second important issue in distance education curriculum design revolves around the support needed for any technologies chosen. Many of the technologies available today are powerful, but complex. Many of these require continuous technological support. Such support can quickly translate into additional staff or larger operational budgets. In addition, instructors involved in distance education must be knowledgeable in any technology chosen. Instructors, who sometimes are eager to use newer technologies in distance education, often become frustrated with integrating them into their instruction. Educational providers must realize that instructors need training in the use of the distance delivery modes chosen. Instructors, who are used to traditional classrooms, often find that instruction requires more advanced planning. It is often more difficult, if not impossible, to change to a teaching alternative "on-the-fly." Instructors utilizing distance-learning tools must develop and integrate a variety of well-planned teaching strategies.

A third consideration, or issue, is the topic of evaluation, which presents some new challenges in distance education. Course formative feedback is generally available in the traditional classroom in a variety of forms. Instructors commonly use periodic evaluations, such as tests and quizzes. Informal cues from learners' expressions can give continuous feedback to instructors. Such cues do not always exist in distance learning formats. Hence, formative evaluation in distance education often is not as easy as in the traditional classroom. Periodic feedback points and the methods used must be carefully planned and incorporated into any course or series of courses. Related to evaluation are the topics of academic integrity and security. These are discussed later in the section entitled, "Learner Grading and Evaluation."

Synchronous and Asynchronous Learning

Those in distance education have sought ways to classify distance education to better understand the needs of instructors and learners. Two major approaches are utilized: synchronous and asynchronous. Synchronous learning occurs when the interaction between the instructor and learner is simultaneous or in real time (Distance Education and Training Council Accreditation Handbook, 2013, page 5). The learners meet in certain locations and sometimes in specific locations, depending upon the technology being used. Such instruction is time-bound and not always place-bound. The following are the main points to consider in synchronous distance education delivery:

- Course development is more time-consuming than traditional classroom courses

- Once an instructor has taught a course in this format, the amount of preparation and support required is similar to that of a traditional class
- Technical support is required
- Learners require at least the same support from the instructor as regular traditional classroom Learners
- Learners often need additional means to communicate with an instructor one-on-one
- Learners need some mechanism to send and receive documents

Asynchronous learning occurs when interaction between the instructor and learner is non-simultaneous or takes place at different times (Distance Education and Training Council Accreditation Handbook, 2013, page 5). It can be from any place at any time, as chosen by the individual Learners and the instructor. There are generally not fixed times or locations. Learners often do not physically go to the educational provider to use the facilities or may go there only to take exams. Major factors to consider in asynchronous distance education delivery include:

- Learners do not come to a classroom or do so infrequently
- All work of Learners and instructors may be done outside of a classroom
- The conversion of material from a classroom format to asynchronous learning requires an entire redesign of the course
- The development and support required for asynchronous courses is often extensive and on-going
- Monitoring of learner feedback must be frequent and routine
- This is the most flexible distance delivery approach

Many distance education courses combine synchronous and asynchronous approaches. The learner may meet sometimes in synchronous modes and at other times utilize various asynchronous teaching methods.

Training of Instructors

When viewing distance education within the standards context, it is important to examine what role education and training has played in the development of courses and programs. Historically, much of what instructors need to know to be effective in the delivery of distance education has not been taught in formal educational programs in the academic world. The IDECC® Certified Distance Education Instructor (CDEI™) certification program is aimed at teaching distance education fundamentals and techniques to instructors who teach distance education courses. Using trained and qualified instructors in both content and delivery of a course is an important factor in effective and efficient distance education.

The more experience and training that instructors receive in distance education methods, the more effective that distance education tends to be. Effectiveness of instructors in distance education can be enhanced in a variety of ways, such as:

- Participating in the planning process
- Observing ongoing classes deemed to be good examples
- Training by an experienced instructor in the delivery modes utilized
- Completing academic classes in distance education
- Learning proficiency in the use of any equipment or technologies utilized in the distance education modes
- Gaining an understanding of the techniques believed to be effective in distance education, such as discussion groups, group projects, one-to-one feedback, and instructor access
- Experiencing a course as a distance learner

Such training and enhancements help provide instructors background and techniques in Learner evaluation, course and program design and evaluation, and Learner support systems. It should be noted that distance education often takes more preparation on the part of instructors than traditional education. Leadership skills, creativity, and time management skills on the part of the instructors are desirable. There are many courses and resources for instructors to learn the important aspects of distance education. Course and program evaluation by the learners provides measures for instructors and administrators to use in determining if the teaching is effective.

Interactivity

Distance education operates on the premise that because the learner is at a distance, more attention should be devoted to how the Learner interacts with the instructor and the material. In general, correspondence courses have been historically criticized for the lack of much Learner and teacher interaction. Contemporary distance education places much emphasis on interactivity.

Higher levels of interaction enhance learning when the instructor and the Learner are separated by distance. There is growing evidence that Learner performance is better when Learners perceive that there are higher levels of interaction. John Keller's Model of Motivational Design known as ARCS (attention, relevance, confidence, and satisfaction) is an example of learning strategies used to help the interaction or the perceived levels of interaction by learners.

There are three distinct but closely related types of interaction. They are Learner-instructor, Learner-Learner, and Learner-content. Each type of interaction is significant to the learning process. Various distance education delivery media utilize these types of interaction to varying degrees. While Learners overwhelmingly appreciate the access these distance education courses provide, they also appear to need an adjustment period to get used to the unique aspects of interaction within this distance education.

Learner Support Services

It is important that learners have the same access to Learner services whether they enroll in a course delivered in a traditional classroom or through distance education. Courses delivered by technology require instructors and providers to take some additional measures to ensure these services. In practice, while some Learners may be more adept at using the technologies, they still require thorough orientation sessions and the other support services learners need to successfully complete a course.

The design of the instruction affects the level of support services in distance education. Because there is so much flexibility in how the courses are designed, it is extremely important that Learner support services be well planned and thorough in order for learners to successfully complete the course.

These Standards Have Proven Successful

ARELLO® Standards have been applied to scores of courses throughout the United States and internationally. These Standards have proven valuable in many aspects. Providers have given testimony that applying the Standards has improved their education programs. Learners have benefitted by experiencing a higher quality education offering. As a result, the public encounters a more qualified practitioner. The unique aspect of these Standards is that they are in themselves flexible while all encompassing. The Standards are well rooted in sound educational theory and cognizant of the distance education approaches, tools, and technologies. The Standards consider all of the important elements of a distance education course, including design, delivery, approach, Learner services, evaluation techniques, and commitment to the endeavor. Courses are reviewed, analyzed, critiqued, and "road-tested." The certification process is well designed, detailed, and thorough. These Standards were the first standards to be developed for distance education courses and remain a leader in distance education course certification. The Standards and the process continue to be refined and improved and have become respected by educational providers and regulatory agencies.

DISTANCE EDUCATION STANDARDS

Introduction to the Standards

The ARELLO® Distance Education Standards are the result of years of research and application of distance education standards to providers across North America, the United States and internationally. Both universities and proprietary schools utilize them. They represent one of the most established sets of standards for distance education that are in existence. The standards grew from a task force organized in 1997 by the Association of Real Estate License Law Officials. Over the years these Standards have been applied, modified, and updated based on years of rigorous application. These standards have stood the test of time as they have been applied to both traditional and emerging technologies.

Working with the Standards

ARELLO® Standards are designed to be broad in order to encompass a variety of approaches. This format requires a program to define itself using a holistic approach. Individual groups, entities, or regulatory agencies, depending on the application, may add specific criteria or restrictions to meet their needs.

ARELLO® Standards utilize a self-study approach. A self-study approach encourages an educational provider to view its activities in terms of strengths and weaknesses. Providers should conduct a review of their courses and evaluate the courses in terms of their strengths and weaknesses in meeting the standards.

I. MISSION STATEMENT

STANDARD I-A.

The course or program is guided by a clear mission, appropriate for career education, the community of interests served, and the resources available. The mission statement must be clearly stated and publicly available.

Drafting the Mission Statement

A mission statement is a broad statement about the educational purpose of a course or program and may include the broad goals to achieve the purpose. A mission statement is important because it explains the reason that the educational entity exists. It is the stated purpose of the organization. The mission statement can change as markets change.

The mission statement defines the mission of the educational programs that are being undertaken. Within this definition, a mission statement should define the purpose of the activities. All educational efforts should reflect the educational mission of the provider. Distance education initiatives of schools and programs must fit into the framework of the broader educational mission of any regulatory agency.

The mission statement must include a statement of your educational purpose and should briefly explain why your educational entity exists. It should clearly state the direction of your educational entity. Typically, a mission statement should answer the following questions:

- What do we do?
- How do we do it?
- For whom do we do it?

Once a mission statement is drafted, answering the following questions can test the value of the statement:

- Does this mission statement foster common goals in our organization?
- Can anyone outside our organization read this mission statement and understand what we do?
- Can we use this mission statement to evaluate our organization's performance?

Examples

To provide quality professional education to consumers, to those seeking to enter the professional industry, and to those practitioners who are seeking to renew a real estate license.

The ABC School is a proprietary establishment delivering high quality instruction to adult learners in traditional and distance education formats. Instruction is supported by highly qualified staff and superior educational technology.

Goals and Objectives

Goals and objectives flow from a mission statement. As specific objectives are developed for the educational endeavors, they should reflect the general mission of the organization. The mission statement keeps the organization focused. Specific objectives help ensure that the broad overall goals of the organization are met. Goals and, most importantly, objectives, as they are developed for specific courses and programs, should

- Define the quality level sought
- Be an index of how progress is measured
- Include how any target is to be achieved
- State the time frame to achieve any target

Public Availability

To meet the standard for public availability, it is recommended that the mission statement be included in printed or marketing materials and in the Learner syllabi and any course manual. You must include copies of such materials with your application for certification.

The mission statement must be included in printed and electronic materials, as follows:

- Printed brochures
- Information regarding the educational provider that is distributed by means of technologies, such as the Internet and television
- Program descriptions
- Course calendars

When using electronic media, especially the Internet, the mission statement needs to be stated on the home page of the educational provider or linked to the home page. When completing a submission, the address of the page where the mission statement is located must be provided.

STANDARD I-B.

Mechanisms are established for periodic review of the mission statement.

Because education and markets are not static, mission statements must be reviewed periodically. It is recommended that the mission statement be formally reviewed annually.

Mission statements are critical since the specific goals of the organization are derived from the mission statement.

The organization must provide a statement of its mission statement review policy and must verify the date on which the annual review took place. **The submission must include the dates of the reviews and a list of names and titles of those in the organization involved in the reviews.** It is not acceptable to state, "Mission statements are reviewed on an on-going basis."

Mission statement review requires organizations to pause and reflect on the mission and direction of the educational efforts to ensure that their activities are consistent with the main organizational goals.

II. COURSE DESIGN

STANDARD II-A.

<u>Subject-matter content and learning activities are consistent with the program mission statement; specific course objectives are stated in performance terms.</u>

Each course should reflect the overall mission statement of the education provider. In addition, each course should be clearly defined in terms of learning outcomes. This includes all learning activities. The most common way this is accomplished is by clearly stating the course learning objectives and strategies for each unit of instruction.

Course syllabi and course outlines must clearly state the course objectives and desired learning outcomes. Courses must be structured with learning outcomes. Learners need to know what they are expected to learn and how they will demonstrate that they have learned the material.

Outcomes give direction to the Learners. Objectives or outcomes are necessary because they define the knowledge or skills the Learners should have at the end of each lesson. They are important since they specify the knowledge and skills that are expected of the Learner to achieve. Outcomes can be specified for all types of learning, including both low-level skills and complex high-level skills.

In general, performance outcomes include three components:

- **Performance**: what the Learner will do to show mastery of the material
- **Conditions**: under what circumstances the Learner will show that learning has occurred
- **Criteria**: what will be used to define the performance

Course objectives must be stated in terms of performance. The action words highlighted in the following examples illustrate learning objectives:

- Upon completion of this unit, the Learner will be able to ***identify*** from memory the types of courts that make up the federal court system.
- Upon completion of this unit, the Learner will be able to ***describe*** in one paragraph how to peel an orange.
- Upon completion of this unit, the Learner will be able to ***install*** a hard drive in a computer within one hour.
- Upon completion of this course, the Learner will be able to ***discuss*** the pros and cons of a fat-free diet in an online discussion group.

STANDARD II-B.

<u>Course design is clearly defined. The course is based on sound learning approaches, such as mastery-based learning.</u>

Courses should be based on a sound educational approach. The certification process recommends that a course be designed on a mastery-based model. Mastery-based learning is an educationally sound approach that has the advantages of providing immediate and effective feedback after the content is delivered. The model is intended to employ informative and corrective feedback. If the course delivery does not provide the immediate feedback, the course should be designed so that the instructor provides appropriate feedback before the Learner moves on to the next module.

A well-designed mastery-based course is module based. It provides checks for Learner learning and provides opportunities for Learners to apply and demonstrate that they have learned the material. Such courses should be designed in a manner that provides remediation when needed. Often this is provided to Learners when they are not able to pass a quiz or demonstrate through an appropriate exercise that they have mastered the material. It is important to note that when quizzes are used in this design a test bank or quiz bank must be utilized in the course. This ensures that the Learner is presented **different questions** based on the material after appropriate remediation.

Mastery-based learning can be used in a variety of settings, but it is often the foundation utilized in a system of individualized instruction.

The Standards do acknowledge that there are other approaches to distance education other than mastery-based. The Standards allow for other educational approaches. Each approach other than mastery-based will be reviewed in terms of its educational soundness for the course. The course should embrace all the phases of mastery learning. In that regard, the course should ideally provide for corrective instruction and enrichment activities. When an instructional designer is involved in the process of instruction, the education provider should have clear course design plans.

Distance education courses must include information about the following items.

- Is there a logical and systematic progression through the course that encourages sequential learning?
- Are instructor home pages incorporated into the course?
- What categories of information are presented on the welcome page or home page?
  - Introduction to the course
  - Virtual office hours
  - FAQ's...if not, where is this presented?
- What communication tools are used in the course design?

- o Email
- o Discussion groups
- o Video
- o Whiteboards and shared applications
- What are the guidelines for the use of the communication tools?
- In the case of communication tools such as shared applications, how is Learner proficiency established before the Learner begins course content delivery?
- How is course information updated for the learners and course change information distributed? Is an update page utilized?
- How are links managed? Is a link page used?
- What back-up systems are utilized in the course design?
- Who is responsible for Webmaster functions?
- What is the design of learning modules, sequences, and lessons?
- What is the nature and extent of the computer-managed course system?
- What security systems are incorporated?

The extent of your explanations must be related to your course design.

STANDARD II-C.

The distance education delivery mode and instructional strategies are appropriate for the course utilizing distance education delivery.

Many types of media and delivery modes are available to distance education. There should be rationale for what is chosen. This standard asks the question, "Why were the specific types of media or combinations of media chosen?" Some media provide greater flexibility than others. Some are more expensive to produce than others and some are much easier to update and change than others.

The answers will provide needed information in the certification process. The key points section provides insights on the delivery modes and their strengths and weaknesses in utilizing different media and combinations of media.

This section provides several reasons for choosing media. The choices of media should ideally be grounded in sound educational approaches, but they may be tempered by financial realities.

Some of the most common reasons for media choices include:

- **Media selection** – Explain why you chose this media over others.
- **Individualization** – In a mastery-based course, you should explain how any remediation is accomplished. You should explain the specific methods and strategies you are employing.

- **Instantaneous** – In a mastery-based course, you should explain how the Learner is given immediate feedback and, when needed, an opportunity to remediate and show mastery. You should also explain how any quizzes and exercises are designed to ensure that the Learner is presented with different questions and/or material when remediation is necessary. If remediation is necessary, different quiz questions and/or exercises should be presented to the Learner to assure mastery. Specifically, you must utilize a question bank that presents different questions and/or material when the Learner has completed a remediation section. It is also necessary that when remediation takes place that it simply does not make the Learner repeat the exact same material. A stronger course design will provide additional information, and/or present the material in a different way to help the Learner learn the material.
- **Costs** – Explain why you have chosen the media and/or technologies in terms of costs to the Learners.
- **Motivation** – Explain how the media you have selected and the course design is of a highly interactive nature.
- **Realism** – Explain how your course has been designed to ensure that the course reflects the realistic nature of the industry and/or real world setting and applications.
- **Portability** – Explain if you chose the media from the aspect of portability for the Learners.

It is important when completing this section that the reasons for choosing are indicated as they relate to the course and the media utilized. This list is not exhaustive. There is space on the application for providing other comments related to media choices.

STANDARD II--D.

Qualified individuals are involved in the design and planning of distance education courses.

Courses in distance education should reflect that knowledgeable individuals are involved in the design and development of the course material. It is recommended that the instructors delivering the course be involved in the planning of distance education courses whenever possible. Individuals involved in subject matter content may include administrators, teachers, consultants, and industry advisory boards.

Courses utilizing educational technologies should involve **individuals with technical knowledge specific to the technological approaches selected** during the planning phase.

As technologies become more complex, it is recommended that professional **instructional designers** be involved in the planning and designing of courses.

The certification process seeks to determine the qualifications of **the people who were involved in the development of the course**. This often includes a **course developer** or, in many cases, **a professional educator or a professional from a given field**. The certification process

examines the qualifications and the background of such individuals. It is necessary to **supply the credentials** of these people in the form of written vitas or resumes.

Likewise, it is necessary to **supply the credentials** of others who have helped develop the course. These could include instructional designers and persons with specific technical background related to the course. Here are some other professionals who could be involved in the course design:

- Project manager
- Systems manager
- Subject matter expert
- Editors
- Programmers
- Graphic artists
- Webmasters
- Copyright adviser

STANDARD II-E.

Reference material appropriate to the course is provided to the learner.

Reference material is important to most courses. It provides additional information to the learner and in many cases updates information that was prepared at an earlier time. This feature of distance education is becoming more important as technologies allow courses to be updated and augmented with such resources as the Internet.

Reference material must be provided with the course submission. This may be in print or in a combination of media. If reference material is in the form of supplemental media, explain how the learner obtains or accesses such materials.

The Internet allows any course to be supplemented and individualized to some extent. When using the Internet, all links and addresses must be supplied and functional. Just as the Internet provides a wealth of information to add to a course, it is a dynamic media, which is in constant change. Sites that work today may move or disappear on a moment's notice.

The certification review process checks and verifies all reference material that is provided as part of the course.

STANDARD II-F.

Course content is accurate and timely.

Course content must be accurate and current for two main reasons:

- Knowledge base and technologies often change at a fast pace.
- Statutes and rules change, which may affect course offerings. This is especially true in regulated professions.

Applications should include an attestation that all courses will have an annual review by designated qualified individuals. Such individuals can include program administrators, instructors, or a committee of subject matter experts from the industry.

An annual review ensures that course material does not get out of date. When course content is presented by means of electronic media, it is imperative that changes in content be made in a timely manner. It is highly recommended that any changes to course material be made as quickly as possible to lessen confusion on the part of the learner.

STANDARD II-G.

Substantial course changes must be documented and reported to ARELLO®. *In the case of regulated professions, such changes must be documented and reported to the appropriate regulatory agency.*

By its very nature, distance education and the technologies change often. It is necessary to document and keep records of these changes. When a change in a course is substantial, the certification process requires that a copy of any changes be sent to the certification body. In all cases where substantial changes must be documented and sent to a regulatory agency, the provider is expected to comply with the rule or statute. Substantial changes would include, but are not limited to, expanded or reduced content, the credit hours for which a course is certified, redirected learning objectives, and changes in delivery method. Simple updating of material is to be expected and would not constitute a significant change.

When substantial changes must be reported to regulatory agencies, copies of **such documentation should accompany the certification submission** when applying for recertification. This provides background information in the application review process.

As an on-going matter, **any substantial changes made to a course after it is certified must be submitted to ARELLO®.** This is especially true when changes are made to the delivery mode or methods of any course. In the certification process, courses are carefully examined for their completeness and the effectiveness of the delivery mechanisms. If substantial changes are made, ARELLO® must be informed of such changes in order to assess the impact the changes have on the overall delivery.

STANDARD II‑H.

When a series of courses is offered in a curriculum, the curriculum provides a sequential development and logical progression.

Most courses are certified on an individual basis. If the course is part of a curriculum, this standard would apply. It does not generally apply to individual courses.

A prerequisite course system is used to ensure that each Learner develops the technical and conceptual competencies progressively throughout the program. Learners should be advised of prerequisites prior to registration, ideally at an advising session.

When prerequisites are required:
- Show how Learner advising takes place prior to registration
- Produce documentation of any prerequisites that are required and explain how these are distributed to Learners

This Standard applies only when a series of courses is offered within a curriculum. When this Standard applies, it is normally illustrated by means of a list of prerequisite courses.

STANDARD II‑I.

Clock‑hours for distance education courses are quantitatively verified.

This Standard covers **clock‑hour time for which the course is certified**. In the case of a new course, quantitative data that verify the clock‑hours for the course must be submitted. This data will include:

- Course text – The course provider must submit a document containing all of the text in the course. This document will be used to quantify the number of words included in the course content.
- Additional learning strategies such as external links, interactive exercises, review sections, video/audio content, diagrams and forms and assessments, etc. will also be taken into consideration for the time review. The provider must provide a written rationale for the amount of time a Learner should realistically spend with the additional learning strategies.

Clock hour time may also be determined or verified by the use of time studies.

III. INTERACTIVITY

STANDARD III-A.

<u>Interactivity is promoted in the program by specific learning strategies.</u>

There is general agreement in the distance education community that interaction is an important part of the learning process. The main goal of interaction is to help make learning active as opposed to passive. Interaction measures the degree to which the learner understands content material. It provides documentation of mastered learning outcomes. Interaction in distance education can be accomplished by using a variety of strategies.

The purpose of the interactivity standards is to look closely at how interaction strategies are designed in the course. The course is examined looking at the types and amount of interaction.

There are two basic types of interactivity, synchronous and asynchronous. Synchronous interactivity occurs when the interactivity is simultaneous or takes place in real time. Asynchronous interaction is not simultaneous or takes place at different times.
This Standard looks at the most common types of interactions and examines what tools are utilized to accomplish the interactions. There are various common tools used to foster interaction in distance education.

There are three possible areas of interactivity in distance education courses. They are

- Learner-to-content
- Learner-to-instructor
- Learner-to-Learner

Distance education courses generally utilize Learner-to-content and Learner-to-instructor strategies. Learner-to-Learner interactions depend on the nature of the course design and are sometimes not utilized in individualized instruction.

Learner-to-content interaction is the manner in which the material is presented to the Learner and the manner in which the Learner interacts with or responds to the content. As technologies advance, there are more creative ways content can be presented. There are more applications of mixed media utilized to present content.

Learner-to-instructor is the manner in which the instructor communicates with the Learner and the Learner with the instructor. Here, too, as technologies advance, there are more options for the instructor to communicate with the Learners.

Learner-to-Learner is the manner in which Learners communicate with each other during the process of completing a course. The advances in technologies offer more options in achieving this goal if it is included in a course.

The various interactions should be appropriate for the course content and the course goals.

Some of the tools that can be utilized to promote interactivity include:

- Email
- Videoconferencing
- List serves
- Mail-back assignments
- Telephone
- Message boards and online forums
- Assessment measures, such as tests and quizzes
- Instant messaging
- Shared whiteboards

Interactivity moves distance education beyond the passive role. There are many considerations involved in the choice and evaluation of interactive tools. Synchronous interactions become more complicated when the learners live in different time zones. The tools utilized in the course interaction strategies are examined in the context of the course goals, the course design, and the resources available.

The certification review process examines what tools and combinations of tools are utilized in the course to achieve specific interactions. This should be a reflection of good course design. This interpersonal activity via electronic means can often accomplish the collaborative learning that is a benefit of classroom learning. The review process asks for an explanation of the tools utilized to accomplish interactions in the three broad areas of Learner-content, Learner-instructor and Learner-Learner.

This tends to be a complex area as more advanced technologies are employed in the course design. **When electronic communication is not moderated, message boards can be filled with incorrect and misleading information.**

STANDARD III-B.

Interactivity is evaluated by appropriate mechanisms.

This Standard seeks feedback from users (Learners) and other appropriate individuals. It should be obtained in an orderly fashion and, in most cases, should not be left to the end of the program and course; therefore, it is necessary for feedback to be gathered during the course presentation.

The course must have methods to evaluate the interactivity components. A question regarding interactivity should be included in the course evaluation. Learner feedback in this area is important, as it is an indication of how the user viewed the course interactivity components. More complex courses utilizing course management tools can evaluate course interactivity during its presentation.

This Standard asks what methods and tools are utilized to evaluate the interactivity components, **specifically how interactivity is evaluated in the course**. This Standard requires a more thorough answer in more complex courses.

IV. COURSE DELIVERY

STANDARD IV-A.

In the delivery of the distance education courses, the technologies are supported by qualified individuals.

As a course becomes more complex, it often requires specific individuals to maintain the technical delivery of the course. In some cases, this may be the instructor who develops the course. In many cases, it will be individuals with the technical knowledge required in the delivery process.

This Standard requires the submission of the credentials of the persons who support the technical aspects of a course. This certification process examines what technologies are used and the strategies that are utilized in the delivery of the courses. Most important, **who is responsible for maintaining the equipment and delivery systems**? These **may or may not be** the same individuals who developed the courses.

When more complex technologies are utilized in distance education, technicians may be required; however, some instructors may be able to provide the support needed. The technical expertise needed is often specific to individual courses based on the delivery method.

In instances where an educational provider utilizes an outside vendor or outsources the delivery and technical support for a course, the names, credentials, and contact information of those individuals must be included with the submission. It is important to explain what the relationship is to any outside vendor and **what specifically are their responsibilities in relation to the delivery of the course**. This is particularly common for secondary providers who use courseware from a course developer. The course developer may at times host the technical aspects of the course. Be sure to include details of how this is accomplished and how this is clearly communicated to the Learners.

STANDARD IV-B.

Instructors are required and numerically sufficient to achieve the objectives of the course and have time to perform the responsibilities assigned to the course.

The emergence of continuing education courses delivered via the Internet with well-designed tools for course management has furthered the debate about the necessity of an instructor. This certification process proceeds on the premise that **a qualified instructor is required for all courses.**

This Standard basically asks who supports the instructional needs of the course. The answers to this Standard will be in relation to the course design and the level of interaction. The underlying premise of this Standard is that there must be an instructor available to support the delivery of the course.

Instructor duties required to achieve effective distance learning vary with the technologies and methods. Instructor support required for various technologies is presented and discussed in the Resource Guide section of this manual.

Depending on the design of the course, instructor requirements vary widely in distance education courses. Debate and research continue on what the exact requirements should be; however, it is doubtful that an exact measure will be found. What is known is that as a distance education course becomes more complex and requires high levels of Learner to instructor and Learner to Learner communication, the realistic number of Learners enrolled in a course at any given time tends to fall.

In the review of any course in the certification process, a course is examined in relation to the instructor support that the course design would normally require. In the case of on-going courses, an educational provider learns over time what any given course will require for instructional support. In the case of new courses, the certification process requires that records be kept on instructor demands during the first year. In the self-study, how many Learners will be enrolled in a course at any given time and the instructor support for "x" number of Learners must be indicated.

Technologies today can provide many tools for course management that can assist instructors with course delivery. An important instructional strategy in distance education is to ensure that the instructor maintains contact with the Learner during a course. This can be accomplished in a variety of ways depending on the technologies employed. However, the standards do require that the course provide a mechanism that monitors Learner progress. The instructor must ensure that the Learner is making satisfactory progress in the course.

It is also important in this section to provide a comprehensive list indicating the instructor's other duties, including other courses for which the individual serves as instructor. If the instructor is full time, so indicate and list the other duties assigned to that individual. For example, if the instructor is also a school administrator and has a myriad of other responsibilities, list the responsibilities. It is necessary in this certification process to determine the amount of time that is available for the instructor to support the course and to determine if there is sufficient time amid other duties and responsibilities. The instructor must state the amount of time each day or each week that is available to devote to the distance education course.

STANDARD IV-C.

The process, policies, and procedures used in instructor selection and retention are equitable and administered ethically.

This Standard examines the process, policies, and procedures used in instructor selection and retention. Such policies and procedures should be in written form and submitted with the self-study.

When appropriate, in larger educational providers, this Standard examines such aspects as the appropriate balance between full-time and part-time instructional staff.

The educational provider should utilize instructors that have knowledge in the distance education delivery media employed in the course. It cannot be assumed that instructors who are excellent in a traditional classroom setting will be excellent in distance education. Teaching styles need to be adapted. The removal of the Learner from the instructor's presence creates new challenges. Traditional tools of classroom teaching often fall short in the distance format. Instructors need training and experience to become effective distance education professionals. This should be reflected in the instructor credentials. If the instructor is not the developer of the course, the provider will ensure the instructor has completed the course and will provide supporting documentation.

The educational provider should encourage ongoing training and, whenever possible, encourage and provide funds for professional development.

Ideally, the education provider should have:

- Written policies and procedures for distance learning instructional staff
- Funds available for instructor training in distance learning
- A professional development plan

Formal policies should exist and be submitted with the self-study relating to instructor selection and retention. These must be in writing.

The credentials of the instructors teaching the course must be included and must reflect appropriate knowledge, skills, and experience related to the technologies utilized in the course.

The educational provider should provide funds or support, or both, for ongoing professional development relative to the delivery methods employed. This is especially critical as the provider adopts distance education courses that utilize complex distance education technologies. Where appropriate, the educational provider should submit professional development plans for instructors who are teaching the distance education courses.

Evaluation of the instructor by the learner is required for each course.

STANDARD IV-D.

Instructors will maintain the Certified Distance Education Instructor (CDEI™) designation.

ARELLO® and IDECC® require a CDEI™ instructor to be associated with every course submitted for certification or re-certification.

The CDEI™ program is designed to be used by persons preparing to teach professional and academic education courses via a variety of distance education delivery methods. Learners becoming certified will have an excellent credential and knowledgebase by which to begin or continue their work facilitating distance education courses.

The CDEI™ program is also designed to present theory and good practice for facilitating a distance education course. The program is divided into two courses: (1) How and why adults learn, and (2) Principles of good practice for teaching online. To earn the CDEI certification, the Learner must complete both courses.

V. EQUIPMENT AND LEARNING ENVIRONMENT

STANDARD V‑A.

Appropriate equipment is specified for the distance delivery system, including details of reliability and selection criteria.

Equipment needed by the learner for any given course must be specified and listed. This pertains to all hardware and software. Any such requirements must be clearly listed in the course materials. It is important that a complete list of equipment be provided for accomplishing the distance education. Since delivery systems are varied, there may be separate lists and specifications for equipment.

This Standard encompasses reliability data for equipment and plans for equipment failures. This Standard helps ensure that there is proper and adequate equipment for the delivery of the instruction. This is an important area, since the design may require Learners to have or acquire specific equipment and software.

This Standard looks at specifications from two perspectives. The first is the specifications of any equipment or software the learners may require. The second is the equipment specifications and reliability data for any media used in the delivery of the course. The plans for equipment failure are also a factor covered in this Standard.

Points to Consider in the Submission‑Learner User:

- Specifications of equipment required by the learner
- Required software
- Who provides software the learners require
- In the case of computers: speed, memory, and special peripherals

Points to Consider in the Submission‑Course Provider:
- Equipment specifications and performance information, including reliability data
- Back‑up systems and procedure for equipment and system failures
- Detailed delivery systems for Internet course applications. Adherence to any broadcast regulatory agency requirements in the case of television or satellite downlink.

STANDARD V-B.

Learning environments are provided which are adequate to support the distance learning approaches utilized.

This Standard addresses both physical locations and the online learning environment. Some distance education configurations require the learners to gather in specific locations. This is especially true in the case of synchronous courses. If the distance education requires special labs or other instructional spaces, such learning environments must be described in detail.

This Standard examines any learning environment where Learners are required to assemble as part of their learning experience. This standard encompasses such factors as lighting requirements, furniture and room configurations, and ADA requirements.

The use of synchronous courses often requires satellite locations. When utilizing these, information should be provided on the following:

- The number of satellite locations for any given course
- Duties and appropriate credentials of site instructors or coordinators who are utilized
- The number and size of the monitors at satellite locations related to room size and the number of Learners at each location
- Instructions for site instructors or monitors regarding checking Learner identification
- Copy of instructions for site monitors for the course
- Whether or not technicians are needed at the satellite locations and, if so, how many and a list of their qualifications

More and more adaptive computer software and hardware are becoming available for the disabled learner at a distance. Providers must comply with all federal law and regulations governing accessibility, including, but not limited to, the Americans with Disabilities Act.

VI. LEARNER SUPPORT SERVICES

STANDARD VI-A.

A complete syllabus or Learner manual for all courses and programs is provided in written form. This includes accurate and clearly stated information about admission, progression, completion criteria, dismissal, and any applicable licensing requirements.

Learners must be provided with complete information on the nature and the specifics of the distance education course or program. Because the courses in most cases involve technologies, it is imperative that complete definitions and specifications be made available to the Learners in a complete information packet.

The information provided needs to cover all information that is typically provided to a traditional classroom Learner. In addition, the material must address the special requirements that the distance education course requires.

The syllabus or course manual is a necessary requirement for all courses. The following checklist covers the most common areas that should be presented to the learners either before or at the beginning of all courses. The information on the syllabus or course manual may not include all of these items. An example would be financial assistance, which is not offered by all educational providers.

Checkpoints for Syllabi and Learner Manuals

- Instructors' contact information, which may include telephone number, e-mail, voicemail, address, toll-free numbers. This should include specific information regarding the policies and hours of availability for such items as telephone and e-mail.
- Registration procedures and times of registration
- Withdrawal or cancellation information and any penalties for withdrawing/cancelling after specific dates
- All course fees, including the costs of required supplemental materials
- Clearly stated refund policy
- Assignments and homework, where applicable, and all pertinent instructions
- Any broadcast schedules and any rebroadcast information and policies regarding missed broadcasts, if applicable
- Schedules for any group assignments
- Clear specific information on any deadlines required in the course
- Technical requirements, such as software, specialized Internet providers, etc.
- Testing information, including method, time and place. This includes information and policies on missed exams and policies regarding failed exams and quizzes. All retake policies must be clearly stated.
- A clear policy regarding any form of cheating or misrepresenting Learner identity.

- Final exam information, including specifics about type and delivery of exam.
- Grading information, including how grading information is made available to the learner.
- Site locations. This is part of distance education courses and may apply to certain other courses utilizing mixed media.
- Responsibilities and procedures for make-up of missed sessions where applicable
- Resource information, including libraries, the Internet, and how any specific re-source information is accessed or procured.
- Americans with Disabilities Act information for requesting information where applicable
- Mailing procedures and addresses if required as part of the course
- Technology support services available to Learners, including contact information and times of availability
- Completion and assignment timelines
- Prerequisites, if applicable
- Illness and completion extension policy

STANDARD VI-B.

Courses have an orientation with the instructor or approved advisor. Mechanisms are clearly in place that allow Learners an early orientation to discuss course specifics.

This Standard requires an orientation. The orientation, as defined in this Standard, is the method by which the Learner learns additional information related to the course. It is the time when the Learner is linked to the course and expectations and contact information are clearly defined. The orientation should be provided prior to the beginning of the course. Ideally, the orientation should provide the opportunity for the Learner to be introduced to the instructor assigned to the course and provide an opportunity for the Learner to ask questions.

With the advent of computerized course management systems, the orientation material can be readily provided via the program. The Standard does require that the Learner be linked to an instructor in some fashion during the orientation.

The underlying premise in this requirement is that Learners at a distance generally need support in most courses. Many believe that courses are strengthened when the Learner has the opportunity to communicate with an instructor. There is some basis for the thinking that the more complex the learning environment, the higher the need for more Learner-instructor interactions.

This Standard closely examines how an orientation is presented in relation to the design of the course. No matter how well course management systems are utilized in online education, there

remains a need for a Learner to ask a question of an instructor when material is not clear to the Learner. The orientation session should clearly define all important course information, as well as other important matters related to the smooth learning environment.

With changing technologies, the communication between the instructor and the Learner can be via technologies. The course design and technologies such as course management tools allow for many approaches to the course orientation and Learner-instructor communication.

The course will be examined in terms of the design of the orientation process and its complexity. Technology, including the telephone, can be used to accomplish the orientation aspect of the course.

STANDARD VI-C.

Learners have adequate access to the range of services appropriate to support their learning.

Learners of both the traditional classroom approach and those enrolled in distance education courses should have comparable access to Learner services. These are services the educational entity provides to Learners in their educational pursuits. This Standard underscores the reality that some services are more challenging to achieve via distance delivery. For example, when an educational provider seeks world markets it faces such realities as time and language differences.

There should be no difference in the type of support services offered to distance education learners as compared to the traditional classroom learner. These services may be delivered via electronic means or other modes instead of face-to-face contact. The fact remains that such services as counseling, financial aid, and services reflected in the course syllabus or course manual should be available to the distance education learner.

This Standard looks at how any such services are delivered to the distance education learner. Course developers and/or providers should make it clear what services will be available and how they will be delivered or accessed.

VII. EVALUATION AND ASSESSMENT

STANDARD VII-A.

The course evaluates educational effectiveness, including the assessment of Learner learning outcomes, Learner retention, and both instructor and Learner satisfaction.

This Standard looks at evaluation and assessment of the course from several important aspects. First, the standards look at the **methods of Learner assessment that are employed to meet the learning outcomes**. The predominant method employed is some type of testing for most courses. A variety of assessment tools can be employed. The type of assessment tools used and how they are administered will be examined. Test banks and computer-managed assessment tools will be reviewed for operational effectiveness and security.

This standard also requires that **data be provided on completion rates** in any course. If a course is new, there will be no data.

This standard also measures **Learner satisfaction** of the course. The Learner evaluation tool for the course must be submitted with the application for certification. Learner evaluations for the course must be compiled and maintained and made available for review upon request during the certification period. The Learner evaluation data must be maintained on each course for recertification. It is recommended that the questions from the standard ARELLO® course evaluation instrument be used. This information is examined closely at recertification.

STANDARD VII-B.

The program provides secure and accurate documentation of Learner identity.

Learner identity is an important element in distance education. This Standard examines methods of verifying Learner identity. Learner identity is an important criterion because the Learner may work away from the instructor and may take examinations at flexible times and at different locations.

This Standard requires that the methods for documenting Learner identity be explained. In the case of online distance education, the educational provider must explain what methods and tools are utilized to ensure proper sufficient proof of Learner identity.

A course may also employ the use of proctors for all or some exams.

In the case of distance education courses, most regulatory agencies require a signed affidavit from the Learner attesting the Learner's identity and completion of the course. The provider must maintain these affidavits.

STANDARD VII-C.

<u>Evaluation data is made available to instructors and may be made available to Learners.</u>

This Standard examines the types and methods of course instructional feedback to providers and instructors. It can show areas of strength and weakness. The results of the evaluations should be used as a basis for further instructor training and/or design and delivery updates.

Learner evaluations should be shared with the assigned instructor or instructors.

Feedback from Learners, both negative and positive, can be used for the purpose of instructional improvement.

In accordance with the previous Standard, course evaluation information should be compiled and sent with the application for recertification. There should be evidence that this information is used as a basis for instructor and course improvement.

At the option of the course provider, such information on course evaluation information can be made available to Learners.

STANDARD VII-D.

<u>Objective criteria have been established for evaluating effectiveness in teaching distance education courses.</u>

This Standard ensures that any surveyor instrument is designed as objectively as possible. Any such instrument developed in-house should be compared and reviewed by a person or persons other than the educational provider delivering the course. These should be people who are versed in developing measuring and evaluation instruments. The credentials of the person or institution that performed the review of the evaluation form must be submitted.

The educational provider can adopt a recognized course evaluation instrument that is in general use and has been recognized as valid for evaluation of distance education courses. ARELLO® has a suggested evaluation form in the certification application packet that can be used as is or adapted. The certification packet is available at www.idecc.org or www.arello.org.

VIII.COMMITMENT TO SUPPORT

STANDARD VIII‑A.

The educational provider demonstrates a commitment to ongoing support of the distance education course. This support is reflected by financial and technical commitments and commitment to continuation of the course for a period sufficient to enable Learners to obtain the course credit the Learner has earned.

This Standard is intended to determine the commitment the educational provider has made to distance education.

These are policy statements that address the commitment of the educational provider to both launch and maintain a distance education program. This Standard is aimed at examination of the overall plan for distance education. Any course or program of courses should be planned with the intent of meeting all of the Standards in this document.

There are several ways this Standard can be met. One is by a statement that reflects the number of years the educational provider has been in business and statements to the success of its educational endeavors. Another way to meet this standard is to submit an annual report or a business plan. Additionally, a statement must be provided regarding how the Learner's enrollment will be honored if the program is discontinued. Of particular interest are statements related to the educational provider's continuous commitment to distance education.

STANDARD VIII‑B.

If the course delivery involves any relationship with organizations outside the educational provider, define by a written agreement the learning activity and the responsibilities of each party. This relationship is consistent with the mission and objectives of the provider.

Many distance educational providers are outsourcing all or part of the distance education delivery.

This Standard examines any such arrangement and relationship with any outside agency in the delivery of the course. If there is such an agreement with an outside agency or company, the following should be submitted with the application for certification:

- Explanations of any such arrangements and formal letters of agreement on such relationships
- Clear and detailed delineation of the responsibilities of each party as to their role in the overall course or program
- A detailed synopsis of the relationship to any regulatory agency related to the delivery of this course

Distance Education Resource Guide

Teaching Tips for Distance Education

Presented in this section is an overview of teaching tips that can enhance the delivery of distance education courses. It is extremely difficult, if not impossible, to provide tips for any given site or mix of media of any given application. The various media require careful attention to the uniqueness of the different technologies. The tips presented here are some practical approaches to distance education that will help in the delivery of most distance education courses.

Preparation

- Be prepared in advance. Distance education courses do not run well "on the fly".

- Be familiar with the content being taught and able to answer any questions.

- Be familiar with the delivery system and any peripheral technologies involved in the course delivery and know channels for technical support.

- Be able to address any Learner problems or questions in a timely manner.

- Be familiar with the time required in order to effectively manage the distance education environment.

- Don't forget the print. It is still valuable and can be delivered by electronic means.

- Use current examples in case studies and assignments.

- Use good judgment in the amount of material delivered in a session.

- Be concise. Keep in mind that technology linkages absorb time.

- Humanize the delivery by keeping focused on the Learners, not the technology.

- Intersperse the course with presentations, discussions, and interactions.

- Start each session with the specific objectives for the session.

- Summarize each session before it ends.

- Be prepared for equipment failure. It will happen.

Interaction

- Know your Learners, their needs, learning styles, prior knowledge and expectations.

- Develop discussion questions, case studies, and exercises that get Learners talking to you and each other when the course design permits it.

- Reinforce the distance education Learner by providing timely feedback.

- Offer flexible office hours. This includes electronic office hours so that Learners can contact the instructor easily since many are working adults.

- Define the communication policies so that the Learners know the guidelines on how and when to use communication tools such as email, discussion boards, and shared applications.

- Consider how much time can be devoted to email and discussion boards when planning the course.

- Consider using more than one vehicle for interaction and feedback; e.g., Email, fax, telephone, and computer conferencing.

- When using multiple satellite locations, include the Learners from each location in your instruction.

- Know who participates and who does not. Contact those who do not.

- Provide feedback often. It personalizes a distance education course.

- Detail assignment requirements and give feedback or return assignments promptly.

- If a teaching assistant is used at a satellite location, ensure that the person is an active facilitator of interaction.

- Alternate between instructional delivery and interaction.

- Ask Learners at selected intervals in the class, "What have you learned?" These are important informal feedback points. Encourage Learner evaluation.

- When possible, establish exercises in the course where the Learners will work in small groups.

A Framework for Developing Distance Education Courses

Instructional development for education, including distance education, is a body of knowledge in itself. There are many references on the subject and there is not one approach or one method. The developer should consider a variety of instructional techniques and interactions. Presented here are the basic key points in a course development framework. It is highly recommended, if the education provider is not familiar with instructional development frameworks, that some time be spent gaining additional knowledge of the course development process.

One approach to course development is to utilize an Instructional Systems Design (ISD). This system or method is often used in the development of multimedia and Internet-based instructional delivery. A major benefit to such an approach is that it is a systemic method of designing instruction that utilizes multimedia. The approach has four major components: the planning and design phase, the development phase, the implementation phase, and the evaluation phase. The process moves the course developer from course goals and educational outcomes to selecting the most appropriate media, to designing the lessons, and to evaluating the course.

Presented here is a brief discussion on instructional development. Instructional development for education, including distance education, is a body of knowledge in itself. There are many books on the subject and there is not one approach or one method. Presented here are the basic key points in a course development framework. Included with the standards is a section on developing a Web-based course that provides a great deal of detail on this.

The Planning and Design Phase

The first phase in the Instructional Systems Design model is the planning and design phase.

Know the Distance Learner

The course developer should try to know as much about the target audience as possible, including the Learners' needs and motivations. If most of the audience has a professional background in the subject, it will affect the level of instruction and the terminology used in any given course. The course provider must understand the experience and needs of the Learners.

Learning styles vary and every effort should be made to present the material in a variety of ways to match the delivery to different learning styles. Another important point in considering the learner population is to anticipate the Learners' access to and experience with the technologies that will be used.

Adult learners have unique characteristics that should be considered when developing a course. As a rule, they are more self-directed and prefer more control to their learning experience and generally require more flexible hours. They value utilizing past experiences as well as receiving education that proves immediately valuable to their professional lives. At the same time, adult learners may also be more resistant to change. These are factors that are important to consider in developing a distance education course for adult learners.

Establish Goals

Establish instructional goals based on the course purpose and the profile of the distance learner. Keep in mind what learners should be able to demonstrate after they have completed their learning experience.

The focus of these standards is on adult education. There is an established body of knowledge on this topic, and there are many books available. Among the general principles of adult education, some are especially important to distance education. Adult learners tend to like self-directed learning and interactive education. They bring a base of personal experience to the learning environment and desire meaningful learning experiences.

Consider the Budget

Early on, it is prudent to think about the financial aspects of developing and delivering a distance education course. Before leaping into developing a distance education course from scratch, look around. Has someone developed the material and has it been prepackaged? Can such material be used as is, or could it be adapted for the proposed course? Developing distance education courses will be costly and time-consuming. Consider your resources when determining whether to use existing material or develop your own. Prepackaged course material can often be adapted. Consider using a wraparound approach that utilizes the instructor's own introduction, examples, conclusions, and summaries.

The detailed costs come into clearer focus once a plan is finalized, but a budget factor will often force trade-offs on what delivery methods are finally selected.

Assemble the Team

Early in the process the course provider should begin to assemble the team who will develop the course. Usually this starts with a project manager or another individual who has the responsibility of overseeing the project. In larger organizations and organizations that specialize in course development, several individuals may be assigned to a team. In many situations, a smaller number of individuals, who have the needed expertise, assume various roles.

The team is often fluid in nature and individuals, or roles are added as the project becomes formalized and progresses. The team may include:

- **Team manager**: has overall responsibility
- **Instructional designer**: applies educational theory, selects instructional strategies, chooses technologies
- **Subject matter expert**: determines the content to be included in the course
- **Systems manager**: is responsible for infrastructure and networking
- **Programmers**: develop and apply software
- **Visual development experts**: graphic artists, videographers, and photographers who develop visual aspects of the course
- **Editors**: make sure that the material is grammatically correct and clear
- **Copyright and legal expert**: ensures that the property is protected and that formal agreements are met with outside parties
- **Webmaster**: ensures that the course will operate smoothly on the system
- **Field testers**: pilot the course and may offer input during the design phase

Avoid the pitfall of understaffing or trying to do this alone. Developing distance education courses is done best by experienced instructional developers. However, many instructors and administrators embark on course development with little or no knowledge of formal course development tools. Some time spent gaining an understanding of instructional development tools will help avoid mistakes and result in a more efficient use of time. **Do not underestimate the complexity of distance education courses.**

Focus on Interactivity

Interactivity in any instructional approach is a focal point in distance education. Each distance education course must require learners to become actively involved in their learning.

Interaction should not be limited in distance education. The three major forms of interaction, Learner – content, Learner – instructor, and Learner – Learner, can be accomplished in distance education courses.

Interactions can be either **synchronous** or **asynchronous**. By definition, synchronous interactivity is in real time. Asynchronous interactions can take place at different times at the convenience of the learners and instructors.

Instructional process and interaction may include, but are not limited to:

- Structured activities
  - Matching exercises
  - Editable forms
  - Case studies

- o   Demonstration
- Non-structured activities
  - o   Discussion boards
  - o   Discovery learning
  - o   Written responses to instructor
  - o   Solution to scenarios
- Group work
  - o   Collaborative projects
  - o   Small group discussions
  - o   Role play
- Individual work
  - o   Research assignments
  - o   Topical reports
  - o   Simulation problems

The activities and the amount of time assigned to each relate back to course goals, outcomes, and course design. If there is a general rule on the use of interactivity, it is "more is preferable to less."

The Development Phase

This process develops the functions of the multimedia: the structure, the sequences, and the interactions that will be in the course. This phase defines what the activities of the Learner and the instructor will be. As courses become more complex, sequential maps are developed that detail the content, the delivery systems, and the interactions.

Establish Outcomes

Outcomes should ideally be established concurrently with the consideration of instructional approaches. The outcomes should be stated in behavioral terms that clearly specify the knowledge and skills that the learner should acquire by completing the course, as well as what the learner will be able to do at the end of the learning process.

Inventory Course Materials

In many cases, distance education courses are converted from classroom courses. However, moving materials from one format to another should be approached with caution. Distance education courses are much different from a classroom course. Generally speaking, distance education course materials require more detail than classroom materials, different teaching strategies, and different types of interactivity, among others.

In some cases, a course will be developed from scratch. In these cases, the knowledge and the resources that will become the course must be gathered together. Whether a course is converted or developed from scratch, these are some of the main items to assemble:

- Books relating to the content, which may be textbooks
- Materials presently being used by the instructor, which may include
  - Notes
  - Multimedia
  - Demonstrations
  - Cases
  - Reference material, including online resources
  - Currently used computer programs, such as PowerPoint
  - Current images, including graphics, photography, slides, and video

The following questions need to be asked:

- Are the materials current?
- What form is the material in?
- Are any materials available currently in data format?
- What software applications are being used?

Review Existing Materials

The old adage about not re-inventing the wheel has its place in this discussion. Review any existing materials to see if they might fit the needs and goals of the course. In many cases it is faster, simpler, and financially advantageous to adopt and modify existing material. At times, it may be possible to use segments of existing material. The ability to use such material will depend on its availability for adoption and the costs that are associated with any formal agreement between the interested parties. Keep in mind the requirements and restrictions of the existing copyright laws.

Develop the Course

When faced with developing distance education materials, the course developer must understand the delivery modes in relation to the course content. The challenge is to match the course goals with the strengths of the different delivery modes. There are several factors of media selection, techniques and strategies to consider. Matching learner needs to course objectives and delivery modes requires thought and planning. Always keep in mind that the delivery modes must be available to all distance learners.

Instructional materials

Decide which existing materials will be integrated and which new ones will need to be developed for the course. Courses can use a variety of multimedia.

Authoring tools, editors, and templates

Decide on the authoring tools, shells, and templates that will be used. Keep in mind platform requirements. These services may be outsourced, but the following is a list of some of the available tools:

- **Web page editors** develop html pages that are at different levels of complexity and user friendliness
- **Authoring tools** help develop tutorials, sequences, and simulations
- **Templates, shells, and complete packages** allow a course to be inserted into an existing template
- **Graphic and digital video editing** focus on graphics and video use in the presentation

Use of print or text

- Keep sentences simple.
- Do not use passive voice. Use active voice.
- Avoid jargon and difficult words.
- Learn to write in a similar "voice" as you speak.
- Personal pronouns are helpful to engage the learner.
- Organize content well, use paragraphs, and keep things in a logical sequence.
- Relevant examples are helpful to ensure understanding of a concept.

Begin with an outline

- Organize print material well before starting to write.
- Content should flow from the outline.

Keep it simple

- Keep the format easy to read. Presentation in print is extremely important.
- Simplicity and readability are often overlooked in print design.

Have a consistent format

- Keep the format consistent to enhance the presentation.
- When designing material such as workbooks, include the following basics:
  - Instructions on completing the course
  - Table of contents
  - Questions

- o Examples
- o Glossary of terms

Course structure

For the purposes of this section, all references to a page are for online distance education courses. Courses that are not offered online should consider the equivalent. The following are suggestions for designing a course:

- **Orientation**:
  - o **The welcome home page**: a general welcome to the course and instructions on the operation of the course. Suggested items on or linked to the welcome page are:
    - ☐ Course title
    - ☐ Name and photo of the instructor
    - ☐ Course description and goals
    - ☐ Message from the instructor
    - ☐ Site map
    - ☐ Calendars and schedules
    - ☐ Class updates and announcements
    - ☐ FAQs, a section that provides answers to frequently asked questions about technical information or other matters
  - o **Checking for computer proficiency**: If the learners are not proficient in using the technology applications, there must be a procedure for bringing needed skills up to an acceptable level. Courses utilizing complex media may have a tutorial section or links to resources that will help the learner gain the needed proficiency.
- **Syllabus or course manual**:
  - o Instructor's name. There may be a link to the instructor's home page.
  - o Assignments and homework, as applicable.
  - o Information on where and how to access online bookstores, if used.
  - o Learner material required, such as software and specialized Internet providers, and information on where required material might be obtained.
  - o Testing information, including method, time, and availability. This includes information and policies on missed exams and policies regarding failed exams and quizzes. All retake policies must be clearly stated. This may be linked to an assessment page.
  - o Clear and detailed information about the final exam (if required) and its requirements and specifics.
  - o A clear policy regarding any form of cheating or misrepresentation of Learner identity.
  - o Grading information, including how grades are made available to the learner. This may be linked to an assessment page.

- Resource information, including the online library as well as links to other sites that contain resource information for Learners.
- Clear specific information on any deadlines required in the course.
- Enrollment procedures, if the learner is not currently enrolled in the course, and the manner of paying fees
- Withdrawal information and any penalties for withdrawing after specific dates
- All course fees, including the costs of required supplemental materials
- Clearly stated refund policy
- ADA information, as applicable
- Mailing procedures and addresses if a required part of the course
- Technology support services available to Learners, including contact information and times of availability
- Completion and assignment timelines
- **Communications page**: Depending on the communication tools utilized, the course design, and the designer's personal preferences, assemble a list of communication tools, such as:
  - Email
  - Discussion boards
  - Chat rooms or video
  - Shared applications

Any communication chosen should relate to the instructional goals. Be sure to establish communication policies. Search engines should be recommended.

- **Structured learning activities**: Structure learning activities according to the course format. Learning activities can include modules, sessions, and topics. Ask and answer the following questions pertaining to learning activities:
  - Are the objectives clearly stated?
  - Are titles clear?
  - Are there structured activities for any communication tools, like discussion boards, chats, and listservs?
  - If group activities are used, what methods are used to keep Learners together when factoring in different course progression rates of individual learners?
  - Are there links to resources?
  - Are required activities organized well?
  - Is there an assessment component?
- **Page design and presentation of material**: Page design and layout are important in online distance education. Learners do not like cumbersome navigation in online courses. Some points to consider are:
  - Keep navigation simple and easy to use. Learners should be able to look at a page and know how to move about—up, down, forward, or backward.
  - Be consistent with use of icons.
  - Pages should not be cluttered and confusing; graphics should have an educational purpose.

- o   Active content should facilitate learning, not distract from it
- o   The more that is added to pages, the more it may impact transfer times and hardware requirements.
- o   Provide information to the user on any files that need to be downloaded. This may be included on the communications page.
- **Assessment page**: This page will describe the methods of assessing learning, which may include tests, quizzes, projects, or other assessment tools. Assessments may be proctored or done online. Include the test parameters, such as the time allowed to finish, and the number of attempts allowed. This page will also address the method to inform learners of their progress.
- **Update page**: This page may list or link to the frequently asked questions related to the course. This is also the place where important information is given to the learners as the course progresses. If the course has an update page, the learner should be directed to it regularly. This page will save time for the instructor because it helps avoid answering the same questions over and over to individual learners and provides important course information. This page tends to grow as a course is delivered. Among the information that may be included on update and FAQ pages are:
  - o   Important announcements
  - o   Link changes
  - o   Changes in virtual office hours
  - o   Subject matter information, such as additions and corrections
  - o   Course changes
- **Links page**: This page allows Learners to access and view all of the links for a course. It also allows the instructor to easily check to see that sites are operational. It is critical that links be checked, updated, and maintained. Ideally, these links would be checked weekly. At a minimum, they should be checked once a month.
- **Security issues**: Decide on the methods to be utilized to ensure security. Determine if passwords are to be used and decide how security is to be monitored.
- **Backup systems and procedures**: Provide for backup systems and procedures for system failures. Some questions to ask are:
  - o   How is it done?
  - o   Who is responsible for the backup?
  - o   What media is used?
  - o   Where is the backup stored?
- **Webmaster**: Provide for someone to assume the role of the Webmaster to manage the systems that deliver the course.

Additional factors to consider

The points below should be considered when reviewing the course management systems:

- **Usability**: How does the course function to make learning easy? Do the design of the course and the technology work well and are the systems transparent or invisible to the user?
- **Scalability**: Can the hardware and the software that support the course be expanded if necessary, in a cost-effective manner?
- **Time tracking**: Does the learning management system have time tracking functionality?
- What information, such as learner records, does the computer collect?
- How are grades collected and distributed?
- How are class-related records and information archived?
- Who is responsible for implementing regular software upgrades?

Instructors

Don't assume that a classroom instructor will work well in distance education. Instructors should be familiar and comfortable with the technologies utilized in the course delivery. Often, additional training is required. Many excellent tools are available for use in distance education instruction. Even with these tools, the role of the instructor is still important.

The IDECC® CDEI™ designation ensures that instructors have the tools and the skills needed to be effective.

Piloting the Course

It is important to conduct a trial run of the course. This should be done with subjects who represent the learner group for whom the course has been designed. This enables corrections to the design, delivery and content to be made before the course is offered.

The Implementation Phase

This phase is when the course is actually published. It is important to have procedures in place for implementing the newly developed course. Consider your management plan, which includes selecting qualified instructors, staff support, and technology support. Launch the course.

The Evaluation Phase

It is often difficult, if not impossible, to foresee all of the challenges and problems that may arise during the development stage. Much of the information for improving the course may come from feedback.

This phase evaluates the course design and delivery, instructor, and the provider to see if the educational goals and objectives have been accomplished. Evaluation data gathered during the

course offerings will provide feedback from Learners and instructors indicating any needed revisions. Both formative and summative evaluations should be used.

Evaluation and Assessments

Evaluation and testing assessment is a large and comprehensive topic in education. This section focuses on items and topics that are primarily of interest in distance education.

There are two main types of evaluation: formative and summative. Evaluations can be a combination of both.

Formative evaluation

Formative evaluation is an on-going process. The goal is to collect information for evaluation purposes frequently. Information from such feedback can help improve the course and the instructional strategies.

Summative evaluation

Summative evaluation gathers information for evaluation purposes at the end of the course.

What Should Be Evaluated?

Whether one uses formative or summative evaluations or a combination of both, there are some main areas of courses about which information should be gathered. Instructors and administrators should encourage evaluation; it can be the best tool to identify areas of a course that need improvement. Here are some common areas that should be evaluated:

Technology being used

- What are the strengths and weaknesses?
- Are there problems?
- Is the technology familiar or unfamiliar?
- How can it be improved?

Examinations and Assessments

- Are there too many or too few assessments?
- Is there adequate review before quizzes and exams?
- Is there enough time allotted?
- Is the level of difficulty appropriate?

- Is remediation available?
- Are exams graded on a timely basis and with adequate feedback?

Course delivery

- Is the course well-structured and organized?
- Is the course content timely and relevant?
- Are there opportunities for participation?
- Is the attendance policy fair?
- Do Learners have the opportunity to communicate with the instructor?
- Is there a supportive atmosphere?
- Is content delivery effective?
- Are assignments relevant and useful?
- Are assignments responded to promptly?
- Are the syllabus and any workbooks adequate?

Support services

- Is there adequate help with any technologies employed?
- Is there a qualified instructor available to answer content questions?
- Are the questions answered promptly?
- Are reference materials available?
- Are advising and help available?
- Are support services available when needed?

General Guidelines

When developing feedback tools, make sure that there are specific questions related to the technologies. Technologies have strengths and weaknesses. Design questions to see if there are any areas of improvements given the technologies employed. Ask questions related to interaction, and ask if the technology was effective in the course delivery.

Include open-ended questions. Ask Learners to identify course strengths and weaknesses, and ask what changes they would suggest. Open-ended questions take more time to review and tend to be more subjective. However, such information may reveal problems that are difficult to expose with purely objective methods of feedback. Here are some examples:

- List three weaknesses of the course.
- If you were the instructor, what would you do differently?
- List three strengths of the course.
- Would you recommend this course to a friend? If not, why?
- Was there anything you expected would be covered in this course, but was not?

- What problems, if any, did you have with the technologies utilized in this course? How would you suggest these problems be corrected?

Feedback should come both from Learners and peers. It is important when collecting feedback on courses that other instructors and administrators review the courses as well. There are no hard and fast rules in this area, but it is advisable to get input from non-Learner sources at least every six months.

Sample Questions

These are samples of the types of questions that can be asked to evaluate distance education:

- Are visuals clear and easy to read?
- Did you have any technical difficulties?
- Did you receive a complete syllabus?
- Were the learning objectives provided at the beginning of each course session?
- Did the instructor allow adequate time for Learners to respond?
- Did the instructor encourage Learner questions?

Copyright

Copyright issues have again come into the forefront with the new distance education technologies. The Internet and multimedia presentations have raised age-old questions regarding what might be considered "fair use." To have copyright protection, a work must be original. Literature is readily copyrighted. Names, slogans, designs, lettering, and the like are not.

Copyright and intellectual property rights issues are extremely complex and are settled case by case. Very simply, the intent of the law is that the copyright holder retains rights to a work and it may be used, sold, or given away as the copyright holder deems appropriate. In essence, the law states that the protected rights include the following:

- To reproduce the work in any format
- To prepare derivative works
- To display or perform the work publicly
- To duplicate copies of the work for the public to use by sale, rent, lease, or gift

Most jurisdictions outside the U.S. have a provision or concept similar to the United States fair use provision, which was established in 1976. It is, however, a gray area at best. The intent was for educational institutions and nonprofit agencies to be able to use copyrighted material without obtaining permission in a very limited manner. The matter becomes more troublesome

for private schools, which often are operated for profit and do not fall under the fair use understandings.

The most prudent thing to do is to seek permission for the use of copyrighted material. In most cases, permission will be granted. If a fee is requested, it is often subject to negotiation.

The Law and Non-print Media

Court cases have made the following matters clear.
- Recording of off the air and cable TV programming requires permission.
- The content of programming may not be altered.
- The copyright notice on the program may not be excluded.
- Internet material can be considered intellectual property.
- Obtain permission before, not after, recording.

Internet

The Internet has brought special copyright problems with it. Unfolding is an entire set of legal rulings surrounding the Internet. It appears that a Web page can be viewed as "owned" property and therefore has the same copyright protection as literature. E-mail and electronic communications appear to be free of copyright protection. In the United States, Congress has passed the Digital Millennium Copyright Act of 1998, Title IV of which does include distance education provisions. In 2002, the Technology Education and Copyright Harmonization (TEACH) Act was passed into law in the United States. With numerous conditions and requirements, the TEACH Act expands the kind of materials that can be used in distance education. An excellent source of information on United States copyright issues relating to distance education is www.copyright.gov.

Outsourcing Course Development

A decision to develop a distance education course can be difficult. There are many important decisions and costs associated with the development of such courses. This is especially true when considering distance education courses that can become very complex. This section offers some considerations to review when making a decision to outsource a course.

Clarify Objectives

Before beginning to look at outsourcing, it is important to know the course goals. Know what the desired achievement is before moving to distance education courses. Is it to meet Learner needs, meet competition, or expand into new markets? Know the amount of money that can be

spent by having a budget in mind. At the bottom line, look at the investment and the expected rate of return.

It is also helpful to have a clear idea of the type of course desired. Is it a total distance education course? If so, what types of learning environments are envisioned? What types of interactions are desired in the course? Is the objective to create a virtual classroom or merely to enhance an existing course with online components?

Shop Around

There are a growing number of firms that provide distance education courses. It is prudent to research the options. Check online and look at sites and products to compare the options.

Know the Questions to Ask

Once one or more firms have been selected for discussion of the project, gather the following information before signing any contract:

- What is the total cost for the course development? What is included in the completed course? What are the costs for revisions? Are there additional costs required during any pilot stage?
- What is the timeline for completing the project? Keep in mind that some firms are working on multiple projects with finite staffs.
- What provisions are included for any software upgrades that may affect the program?
- Where will the course be housed? If it is on the course developer's server, what are the qualifications of their support staff and what is their track record?
- If the course resides on another server, what type of technical support will the course development firm provide? Are there additional costs and what will they be?

Do Additional Homework

Before making a commitment, talk with others who have used the services of the firm. Determine their level of satisfaction to identify any areas of concern with the weak points. Get permission to take one of the courses the firm has developed. It is a good way to find out how a course really works.

Stay in Contact During the Development Period

Once a firm has been selected, be prepared to work with them to provide input and keep abreast of the progress.