

Academic  
**LEADER TODAY**

# SPECIAL REPORT

**LEADING WITH INTENTION:  
Online Faculty  
Development  
and Evaluation**



# About this Report

Supporting excellence in online education sounds like a reasonable objective, but it often becomes easier said than done. As an academic leader, you may not have taught online classes yourself, yet you're responsible for excellent outcomes. You may be evaluating course design, reviewing teaching methods, facing enrollment and retention issues with online students, or choosing quality review assessment tools to use at your institution. Taken from the pages of *Academic Leader* newsletter and *Distance Education Report*, this *Academic Leader Today* free report is sure to give you tips for leading with intention in the online space.



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# Supporting Excellence in Online Teaching and Learning

*Jennifer Patterson Lorenzetti, MS*

**H**ow can institutions support excellence in online education? The question is one of paramount importance to all institutions with online course offerings, but it may be a particular challenge to residential research universities, which are not necessarily designed with online education in mind. But Julie Schell, EdD, director of OnRamps and Strategic Initiatives at the University of Texas at Austin, is meeting that challenge. She is passionate about the way that course design can be used to foster excellence in online teaching and learning.

First, she explains that it is important that institutions not “use technology to take old methods and [scale them up].” For example, she notes that many online courses such as MOOCs may take pedagogical methods that work in the face-to-face classroom and use technology to scale them up to reach a (sometimes much) larger audience. “That’s not supported by research,” Schell says.

Instead, she urges departments, faculty, and instructional designers to “think about who is the user and what . . . they need.”

One big challenge, though, is that many institutions have embraced design trends from two decades ago.

One of these trends is “backward design,” which emphasizes starting the design process with the creation of learning objectives that detail what the student should know, understand, and be able to do by the end of the course, then working backward to design a course that will teach those things. “People have adopted that, but online and face-to-face [each] require a different instructional design,” she says. However, she explains, using a different design approach may not necessitate a different pedagogy; it simply means that thinking about design problems will yield a better result.

## THE DESIGN THINKING PROCESS

“Backward design is not innovative enough for online learning,” Schell says. Instead, she explains, her institution uses a method called the “design thinking process.” Originating at Stanford University, this process aims to help people solve “wicked problems,” which Schell defines as “contexts where there’s no routine and no predictability.”

The design thinking process website (<https://dschool.stanford.edu/resources-collections/a-virtual-crash-course-in-design-thinking>) explains the process like this:

“The design thinking process first defines the problem and then implements the solutions, always with the needs of the user demographic at the core of concept development. This process focuses on finding, understanding, creating, thinking, and doing. At the core of this process is a bias toward action and creation: by creating and testing something, you can continue to learn and improve upon your initial ideas.”

The site describes the five-step process to use design thinking:

1. **EMPATHIZE:** Work to fully understand the experience of the user for whom you are designing.
2. **DEFINE:** Process and synthesize the findings from your empathy work to form a user point of view that you will address with your design.

3. **IDEATE:** Explore a wide variety of possible solutions through generating a large quantity of diverse possible solutions.
4. **PROTOTYPE:** Transform your ideas into a physical form so you can experience and interact with them.
5. **TEST:** Try out high-resolution products and use observations and feedback to refine prototypes, learn more about the user, and refine your original point of view.

## THE IMPORTANCE OF INVOLVING THE RESEARCH UNIVERSITY

Achieving excellence in the design of online education is particularly important for research institutions, Schell says, because of the overall mission of the research university. “We are training the innovators of the 21st century; we need people to make progress toward problems that we don’t have answers to.”

Using the design thinking process allows an institution to prepare its graduates for the jobs that they will eventually hold in ways that are not typically considered “career preparation.” Graduates of research universities often go into positions that require the immediate ability to deal with ambiguity and solve problems without clear answers or clear paths to the solution. “We need students to have this skill set on day one of the job,” Schell says.

This ability to deal with ambiguity can be a particular challenge for research universities, especially in departments dedicated to the sciences. By necessity, much education in the sciences is based on replicating

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*Using the design thinking process allows an institution to prepare its graduates for the jobs that they will eventually hold in ways that are not typically considered “career preparation.”*

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experiments with known outcomes and learning to follow proven processes that lead to predictable results, in the hopes that when students tackle problems without known solutions, they will be confident that their processes are sound. But modern problems are often of the wicked problem variety, filled with numerous shifting variables that are difficult to define and control. Students need to be able to handle these types of problems. And, as Schell points out, this

need to handle the wicked problems of the world is not limited to the hard sciences; students in the arts, humanities, and social sciences need this ability as well.

The University of Texas at Austin has used the design thinking process to create classes that foster these critical abilities. Schell explains that the process has led to the creation of experiential learning activities and project-based learning, all of which are tailored to the online environment.

## GETTING STARTED

Many institutions make the pursuit of excellence in their online endeavors a priority, but using tools like the design thinking process may be new, especially for institutions that have embraced backward design and other methods of instructional design. For these institutions, Schell has several recommendations:

1. First, “it’s doable,” she says. Embracing this new design process, she continues, “is not super-high threshold,” and it is something well within the reach of many institutions.

2. It is critical, she says, to “[think] about students and how they learn and what they need.”
3. “Follow cognitive science.” One of Schell’s most recent endeavors is using cognitive science research to look at how flipped classrooms are designed.
4. “Find ways to bring faculty together in collaboratives for education,” she adds. When faculty work together, they can truly support the development of excellence in online education. “Stop thinking of faculty as people who need to be developed, and give them frameworks to work within,” she says.
5. Finally, use assessment as learning opportunity. “The power of online learning is more in assessment. Build an assessment framework to enhance learning, not just measure it.”

Schell notes a popular saying in higher education that, in a class, “it’s the pedagogy, not the technology” that’s important. She would add that design comes even before that—it’s the structure that helps online education become truly excellent.

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# How Faculty Learn to Teach Online—What Administrators Need to Know: An Article Summary

Jennifer Patterson Lorenzetti, MS

“Research shows most teachers teach as they were taught. However, distance educators lack a model or benchmark for online teaching because many of them have not taken online courses as students.” This is the compelling problem posed by Steven W. Schmidt, Christina M. Tschida, and Elizabeth M. Hodge, all of East Carolina University. Writing in the Spring 2016 issue of the *Online Journal of Distance Learning Administration*, the authors look at best practices in teaching instructors to teach online.

“Online teaching requires specific skills and competencies, and faculty cannot be expected to know intuitively how to design and deliver effective online courses,” the authors continue. It is not as simple as

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*One size clearly does not fit all when it comes to training online instructors.*

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moving a face-to-face class online and expecting the same pedagogical techniques to work. Higher education has typically relied on instructors replicating the practices of good instructors while they were students some years later in their own classrooms. However, this leaves

a gap for the current generation of instructors who have never taken online courses and thus have no practice models to emulate.

To learn more about effective strategies for training online instructors, the authors employed a focus group to gather data about successful training methods.

## PROFESSIONAL DEVELOPMENT TOPICS

Most colleges offer professional development training, but instructors report that the typical focus on the use of technology leaves some important areas without coverage. “Respondents pointed out that there are major differences between knowing how to use technology in an online classroom, knowing how to effectively design online courses, and knowing how to teach online. Respondents indicated there were few opportunities to help them learn about online teaching and online course development (curriculum design),” the authors write. One respondent characterized learning to teach online as a baptism by fire: “A professor that had been here for 10 years had given me the design of the course, but [support for] how to teach online was zero. Everything was by the seat of my pants.”

## SMALLER AND MORE FOCUSED TRAINING

Respondents reported that training needed to be much more individualized and allow the instructors to get content tailored to their own needs. “Several participants explained how professional development sessions offered at the university level, while well intentioned, did not allow for tailoring to their specific or individual needs. The sessions were often too generic and provided too much information and often did

not address the questions they had about content and structure,” the authors write. Participants also noted the greater effectiveness and greater level of comfort with smaller group sessions.

## **INFORMAL LEARNING**

If small-group training was good, one-on-one sessions were even better. “In learning to teach online, some participants asked for help from colleagues in their departments and in the college—often from faculty members in departments related to online teaching and learning, such as the college’s instructional technology department. Others called on colleagues at other universities, as well. One noted most of his ideas for teaching online came from either colleagues or by attending conferences,” the authors observe. This strategy allows instructors to draw inspiration and guidance from the instructors they believe are most effective and avoid those who aren’t giving pedagogy much thought. “What I’ve found to be most helpful is just asking people at lunch about some new piece of technology and then figuring out how to put it into [my] class, rather than some formal training,” one participant stated.

Gathering information one piece at a time also allows instructors time to consider and incorporate the advice in a more deliberate fashion. “While large, formal training sessions were seen as content heavy, focus group members found informal learning of one small piece or aspect of online teaching allowed them to focus on how they might incorporate that piece of information into their course. Participants often learned more from five-minute technology sessions held at the end of a meeting or hearing about a specific tool or tip during an informal mentoring session or discussion with a colleague,” the authors write.

## **OPPORTUNITIES FOR SELF-DIRECTED LEARNING**

One size clearly does not fit all when it comes to training online instructors. “Instructors inevitably found themselves looking for very specific learning opportunities based on their knowledge of online teaching and their level of technological expertise. For the majority of participants, this meant moving from formal professional development occasions to more informal learning opportunities. Many talked about their own desire to learn more through reading, online explorations, and product testing,” the authors explain.

## **RECOMMENDATIONS**

The authors offer several different recommendations for how to provide quality training for online instructors:

1. “Administrators should offer multiple options for professional development, including options at different levels of the organization, keeping in mind smaller and more focused opportunities were found to be more beneficial than larger, more general ones.”
2. “Online learning tips, suggestions, and ideas can be shared with instructors in a variety of ways such as scheduling short, five- or 10-minute training sessions around staff meetings, in-service sessions, and other times groups of instructors are together. Also, consider electronic as well as traditional methods of presenting content. Include one or two online teaching tips in each employee newsletter, for example, or develop a weekly or monthly e-mail message focused on online teaching.”
3. “Administrators should provide opportunities that focus on technology but also on online teaching and online curriculum development. With the many technology tools available to online instructors, it is easy to focus professional development on the latest gadgets and tools; however, online instructors must know how to assess whether a new technology will actually enhance their course and improve student learning.”



4. “Initiatives that aid in the development of small groups or learning communities should be considered. Mentoring programs pairing experienced online instructors with instructors new to online teaching are valuable. Providing ways for instructors to get together and informally network, share tips and strategies, and get to know each other can result in the development of collegial networks that can have long-term benefits for online instructors.”

Online learning presents a new kind of challenge for instructors who may never have sat in a virtual classroom. Providing training geared for these specific challenges can only improve the work instructors do.

*The complete article is available at [www.westga.edu/~distance/ojdla/spring191/schmidt\\_tschida\\_hodge191.html](http://www.westga.edu/~distance/ojdla/spring191/schmidt_tschida_hodge191.html).*

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# Evaluating Online Instructors: Invite the Faculty or Go In Cold?

*Joanna Miller, EdD*

When students arrive at their computers—or their phone screens—for the first day of their online courses, no faculty are physically present to guide them through the syllabus, course expectations, or finding their way around in the class.

It's often a make-or-break moment for online students—either they open the virtual door to find directional signs and intuitive next steps, or they plunge into a pool of chaotic clicks that result in directionless drifting.

If that's the sink-or-swim leap that students must take on their first day, shouldn't administrators and peers approach evaluations for faculty teaching online courses in the same manner? Should faculty be present for evaluators entering their classes when they are not present for students?

That's the debate roiling on many campuses where deans and other evaluators, long shy of online courses, are now stepping into the mix. With 5.3 million post-secondary students nationwide taking at least one online course, and higher education online continuing to grow (according to the 2014 Babson Research Group study), evaluating instructors' online classes becomes a higher priority. Whereas online classes were once an afterthought, they are now part of the regular evaluation cycle at many colleges.

## UNDER THE SPOTLIGHT

Online education is coming under the spotlight in many states. In California, which has 102 public community colleges, the state's accreditation board has signaled a new emphasis on online education.

At a California Academic Senate Institute held in San Mateo in February, members of a panel on accreditation noted that while some visiting accreditors are satisfied with a sample of online classes made available by the administration, others are now looking into each online course shell. They seek to determine, among other concerns, whether the instructors are present in their courses in accordance with the Carnegie unit formula of one hour per one course lecture unit.

Classes in which instructors provide the kind of contact and presence that a Carnegie unit prescribes would likely provide guidance to students. Therefore, no faculty need be present during evaluation of an online course, administrators could argue.

That argument has merit. Best practices in online education describe courses that are intuitive from the first encounter. Students take their first virtual steps inside the course and can tell immediately where they should go and what they should do next. There is a "Start Here" button or an instructor's welcome letter or video. There may be a recorded or text version of an orientation inside the course, perhaps even an orientation quiz to ensure comprehension. If evaluators can't find those directions easily and independently, how could students?

But best practices also suggest that online instructors should contact their students in advance of the beginning of classes. Instructors being evaluated may have sent e-mails to students with a welcome letter, course instructions, or information about orientation in advance of the course beginning. These notifications would not be visible to the evaluator, unless the faculty were careful to send the e-mails from inside the course shell. If the class instructors require a synchronous online or even in-person orientation meeting, that may or may not be immediately visible or apparent to an evaluator who has not received

those e-mails. And because many Learning Management Systems (LMS) do not include records of e-mails sent outside the course—even those official college district e-mails—the evaluator wouldn't know what had been done ahead of time.

## WHAT'S FAIR?

Still, late students may add the class the day the course begins or even during the first two weeks at some colleges. Their experience could be similar to that of the evaluators dropping into the class.

If the evaluator is willing to watch and engage with the entire orientation, as a late-arriving student would be required to do, then it's a fair deal to allow administrator and peer evaluators to open the virtual class door, have a seat, and attend the class to see what students see.

But if evaluators intend to skip through this crucial portion of the course, they should allow the faculty to help them get started by being present to guide them through the beginning—offering information on

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*Online faculty should be held to a high standard.*

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course expectations, where to find evidence of instructor presence and student interaction, and, in general, how and where to click for what. That's only fair, as online students can and frequently do ask procedural questions of the instructor early on.

In addition—and this is anecdotal and experiential, not founded in data—allowing the faculty to be present for the initial introduction to evaluators could alleviate needless anxiety about what the evaluators will or will not find or understand.

## WANDERING THROUGH THE COURSE

After that initial explanation, assuming they are not otherwise contract-bound or restricted to a specific set of topics, the evaluators could then wander through and explore the course to understand the nature and frequency of instructor-initiated contact, including course news and announcements on the homepage, online meetings with students in online office hours or synchronous chats, instructor guidance in discussions, instructor-led lectures, and assignment feedback. The evaluators might look up one of the group work assignments or discussions to see how students interact in the course. Evaluators may find an instructor-placed survey asking for student feedback on such issues as due dates, lecture type and length, and the sense of community the course engenders.

But what about the students who register late and arrive to class without benefit of the advance e-mails the instructor has sent or the synchronous orientation the instructor required. Surely the evaluation has to take these students into account? Yes, of course. But what would an instructor—whether onsite or online—require of a student arriving late? Instructors would require the students to orient themselves, perhaps through a recorded archive of the orientation or through a face-to-face or online one-on-one meeting with the instructor.

Online faculty should be held to a high standard. Students' education is at stake. But online faculty should be allowed to be present and explain a little before you take your walk through their classroom. It's what online faculty would do for their late-arriving students, and it's the same courtesy you would provide your onsite faculty.

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# Evaluating Online Teaching: A Review

Jennifer Patterson Lorenzetti, MS

More than a decade ago, Thomas Tobin, coauthor of the new book *Evaluating Online Teaching: Implementing Best Practices*, was hired to teach a business English and communications class in a hybrid format. When the time came for evaluation, he received a thorough evaluation based on the chair's observation of the face-to-face portion of his class, but the section of the evaluation instrument meant for the online component was left completely blank. "The department chair eventually confessed that because he had not himself taught using the institution's LMS, he didn't feel qualified to rate Tom's use of its tools," the book explains. Evaluation of the online component of the class was not something the administrator was equipped to do.

"The pendulum is now swinging back toward seeing 'teaching as teaching' regardless of the delivery medium," write the authors of *Evaluating Online Teaching*. Although colleges and universities are moving toward an understanding that teaching online, in the hybrid classroom, and in the traditional classroom are all substantially equivalent, evaluation methods must necessarily vary by delivery method to capture and analyze the appropriate information without too much wasted effort on the part of administrators or faculty members. This is where a book like *Evaluating Online Teaching* comes in. It is filled with illustrative examples, detailed how-tos pertaining to tailoring and executing the best ideas in evaluating online teaching on your campus.

The problems inherent in evaluating online teaching arise understandably. "Deans, department chairs, faculty members, and students rate and evaluate teaching at their institutions mostly through home-grown processes and forms," write the authors. "Although these are often constructed to help observers and raters to provide meaningful information, it is often the case that even now [years after Tobin's experience], little training is provided for those using the evaluation instruments." Many institutions find that one size cannot fit all.

Take the experience shared by coauthor Jean Mandernach, who relates a conversation she had with a colleague at another university: "Though well established, the university was relatively new to the world of online education, and, despite her confidence that they were providing online students with a quality educational experience, they lacked a system to document teaching effectiveness and student learning."

Mandernach helpfully shared all of the resources she could from her university. However, "the evaluation system [she] had shared addressed many factors that were not relevant for my colleague's university. Implementation of the process was reliant on an operational structure that didn't exist at their institution." Mandernach adds that her colleague "became increasingly concerned about the likelihood of gaining faculty and administration support for this type of evaluation. Despite a shared goal to evaluate the quality of online instruction, the contextual differences between our institutions made it impossible to simply adopt the tools and processes of one institution for use at the other."

This is one of the key strengths of *Evaluating Online Teaching*. Divided into sections including planning, formative evaluation, summative evaluation, and sustaining a culture of evaluation, the book draws on research to introduce important concepts about how to develop and execute evaluation programs, and it clearly explains questions that institutions should address when building the system that will work best on their campus. Sometimes these systems take the form of complicated forms and checklists, but sometimes the perfect solution is easily planned and executed.

Another story by Mandernach illustrates that point. “During a recent chat, a fellow online educator mentioned her constant struggle to find the right balance of instructor postings in the asynchronous discussion. As she explained the challenge, ‘If I post too much, the students become passive and rely on me to carry the discussion; if I post too little, the conversation becomes shallow and fails to explore key issues. I’m just not sure where the tipping point is.’” Mandernach replied with this simple question: “Have you asked your students?”

For example, the author describes an instructor who had worked very hard to develop a supplemental resources webpage for his students, populating it with the latest information from his field. He wondered whether the students were using it; a simple, four-question poll answered his question. The instructor was pleased to discover that the students either were using the webpage or intended to do so now that it had been called to their attention. This small example of formative assessment let the instructor know, with a minimum of fuss, whether his efforts were misplaced.

Another element of successful evaluation of online teaching is understanding who is qualified to review particular portions of a course. For example, student evaluations often cause a great deal of concern among faculty members and are often given a great deal of weight in overall instructor evaluations. Indeed, as the book points out, regardless of course delivery medium, students are typically asked to assess things like course organization and structure, instructor communication skills, teacher–student interactions, course difficulty and student workload, assessments and grading, and student learning. Other items might be better left to administrators.

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*As coauthor Ann Taylor notes, “Finding the right tool to support an institution’s formal administrative review of online teaching can be challenging. . . . Even when suitable tools are identified, rarely can they be used as-is.”*

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Administrators may find that they have difficulties assessing as well. Tobin points out that he once received a question from an administrator preparing to do his first online “observation.” The administrator asked, “Our observation form has the item: ‘Instructor demonstrates enthusiasm.’ How can instructors demonstrate enthusiasm in an online course?” A discussion ensued about how to deal with the nuances posed by a survey instrument and a context that were both designed to evaluate a traditional classroom.”

As coauthor Ann Taylor notes, “Finding the right tool to support an institution’s formal administrative review of online teaching can be challenging. . . . Even when suitable tools are identified, rarely can they be used as-is. Adaptations need to be made so that the tools can be used for institution-specific context and needs.” This book will help administrators identify the tools that can be adapted, develop new ones, and employ them all effectively.

Tobin, T. J., Mandernach, J. B., & Taylor, A. H. (2015). *Evaluating online teaching: Implementing best practices*. San Francisco, CA: Jossey-Bass.

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# Three Strategies to Improve the Quality of Online Education on Your Campus

*Brian Udermann, PhD*

When talking about online education, *quality* can be hard to define. This should come as no surprise, though. Institutions have been struggling for years to define quality in face-to-face courses.

Consider this dictionary definition of quality: “The standard of something as measured against other things of a similar kind; the degree of excellence of something.”

Institutions may attempt to measure the quality of online courses and programs in a variety of ways, including student and faculty satisfaction data, retention rates, student evaluations of teaching, student learning outcomes for a course, peer (instructor) evaluations of teaching, course design, student graduation or exit surveys, and employer surveys.

There is no question that institutions have been placing more emphasis on the quality of their online programming in the last 5–10 years. Here are some thoughts of an online administrator in response to that new interest—principles that I’ve found to be important in maintaining quality in online courses.

## **1. HIRE INDIVIDUALS WITH PEDAGOGICAL AND TECHNOLOGICAL EXPERTISE TO ASSIST FACULTY.**

As institutions continue to expand the number of online courses and degree programs they offer, I’m always surprised to learn that some colleges and universities still do not employ appropriate personnel to help faculty design and develop online courses. These individuals’ job titles may vary: instructional designer, instructional technologist, instructional media specialist, eLearning designer, multimedia designer, instructional systems designer, and many more.

I became the director of online education at my institution in 2007, and by 2009 we had hired our first instructional designer; in 2011 we hired our second, and we had approval to hire a third in 2013. (Sadly, budget cuts prevented that hire.) I can say without reservation that our instructional designers have been the driving force behind improving the quality of online programming on our campus.

Our instructional designers promote quality course design and facilitation with faculty in a variety of ways, including frequent scheduled and drop-in one-on-one consultations, workshops, and seminars, and they offer a three-week online instructor training course.

## **2. ENCOURAGE CONSISTENCY IN COURSE DESIGN AND DEVELOPMENT.**

A number of years ago while reviewing online student survey data from my institution, I noticed an interesting theme in student comments: students appreciated how their online courses were beginning to have a more consistent look and were incorporating many of the same tools within our learning management system.

To help promote consistency across our online courses, we created optional templates. Faculty may choose to use an online course syllabus template with approximately 25 sections that include instructor

information, prerequisites, materials and tools, learning objectives, course outline and schedule, course expectations, netiquette, how to succeed as an online learner, and student support services.

Our online courses are offered in varying lengths, so we now also have 14-week, seven-week, and four-week course templates that have prepopulated modules or items within the content, dropbox, discussion, and grades areas, so faculty simply have to change the names of these items and not go through the entire process of repeatedly creating them. We do not require faculty to utilize these templates; we simply make them available. However, many faculty do choose to use them.

### 3. IMPLEMENT A QUALITY ONLINE COURSE REVIEW PROCESS.

Many institutions are now reviewing the quality of the online courses their faculty develop. Some institutions employ a subscription service such as Quality Matters; others use publicly available quality review rubrics. It also is becoming more common for institutions to create their own review rubrics, something we did 5–6 years ago.

At some institutions, these quality course reviews are required prior to an instructor's being able to offer an online class. At institutions such as mine, where faculty receive funding to develop online courses, a course review may be required to document that a course has been fully developed prior to faculty receiving payment. And some institutions utilize course reviews simply as a way to provide feedback to faculty about online course design and development.

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*Measuring and documenting the quality of online courses and degree programs can be a complex and time-consuming undertaking, but it is something that more and more institutions are pursuing.*

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At my institution, we conduct 40–45 quality reviews a year for online courses. Following a course review, we also bring in the faculty member and go through the review with that person present, a unique practice.

Providing feedback in person—positive as well as recommendations for improvements—allows faculty members to explain why they did certain things and facilitates interaction between faculty and our instructional design team. On

occasion, faculty can be resistant to receiving recommendations related to course improvements; however, the vast majority of our faculty report that they appreciate these in-person reviews.

Measuring and documenting the quality of online courses and degree programs can be a complex and time-consuming undertaking, but it is something that more and more institutions are pursuing. If your institution has not yet had a discussion about what quality online programming looks like and how it can be measured, I encourage you to gather the appropriate stakeholders (students, faculty, instructional designers, administrators, etc.) and initiate that process. Doing so will help build and ultimately sustain a culture of quality surrounding online programming at your institution.

**Brian Udermann, PhD, has served as the director of online education at the University of Wisconsin–La Crosse since 2007. He is a frequent presenter at regional and national conferences, speaking on a variety of topics related to online learning.**

# Choosing Program- and Institution-wide Quality Review Assessments

*Brian Udermann, PhD*

The concept of measuring quality in online education can be difficult because students, instructors, and administrators might have different ideas of what quality means. Measuring quality for one particular online course is fairly commonplace and has been done for the past 10–15 years. Quality reviews at the program or institutional level are less common but are increasing.

## **BENEFITS**

However, there are multiple reasons institutions might pursue a quality review at the program or institutional level. Such a review could certainly help an institution identify its strengths and weaknesses, which in turn could help guide resource allocation in areas such as professional development opportunities for faculty, efforts to improve retention among online learners, effective use of technology, and ensuring that online courses are accessible for all learners.

In addition, more institutions are developing strategic plans for the role of online education. A program- or institution-wide review can help guide strategic planning efforts and could help identify future priorities and initiatives related to online education. Regional accreditors are showing greater interest in evaluating and assessing the overall quality of an institution's distance education offerings, so an institution-wide quality review could be extremely valuable in helping plan and prepare for that type of accreditation visit and review.

Institution-wide reviews can also help online administrators learn more about other areas of their campus that contribute to the success of online instructors and learners. I recently led an effort on my campus to complete the Online Learning Consortium Quality Scorecard (more on the scorecard in a bit). Following that process, I was more aware of how units and offices such as the library, records and registration, information technology services, the tutoring center, financial aid, admissions, career services, the counseling center, student life, and our teaching center contribute to the overall success of online learners and instructors.

I do feel there is great value in having experts from outside one's institution take an objective look at the policies, procedures, and the overall infrastructure in place for online education on the campus—and that can occur with an institution-wide review. In addition, if an institution has been doing a good job of focusing on the quality of their online programming, a review could help reinforce that it has been doing the right things.

Throughout the rest of this article, I'll discuss a number of resources that can serve as guiding documents as well as options for more formal quality reviews.



# QUALITY GUIDES

## QUALITY ON THE LINE: BENCHMARKS FOR SUCCESS IN INTERNET-BASED DISTANCE EDUCATION

In 2000, the Institute for Higher Education Policy, with support from Blackboard and the National Education Association, released *Quality on the Line: Benchmarks for Success in Internet-based Distance Education*. This document consists of 24 benchmarks considered essential for ensuring excellence and quality in Internet-based learning, broken down into seven categories:

- institutional support
- course development
- teaching and learning
- course structure
- student support
- faculty support
- evaluation and assessment

## HALLMARKS OF EXCELLENCE IN ONLINE LEADERSHIP

The *Hallmarks of Excellence in Online Leadership* are from the University Professional and Continuing Education Association. The Hallmarks document, created in 2014, focuses on what constitutes successful online leadership and consists of seven hallmarks or facets of leadership. For each facet, information is provided in relation to goals, key elements, and key performance indicators, and it includes implementation suggestions. The seven hallmarks are as follows:

- advocacy and leadership within the university
- entrepreneurial initiatives
- faculty support
- student support
- digital technology
- external advocacy and leadership beyond the university
- professionalism

## NATIONAL STANDARDS FOR QUALITY ONLINE PROGRAM

The *National Standards for Quality Online Programs* are from the International Association for K-12 Online Learning. (iNACOL). According to iNACOL, the standards focus on what is needed for a quality online program and consist of 48 guidelines in four primary areas:

- institutional standards
- teaching and learning standards

- support standards
- evaluation standards

## **OPTIONS FOR FORMAL REVIEW**

### **ONLINE LEARNING CONSORTIUM QUALITY SCORECARD— CRITERIA FOR EXCELLENCE IN THE ADMINISTRATION OF ONLINE PROGRAMS**

The OLC Quality Scorecard review can be used for a single program or an entire institution-wide review. The scorecard consists of 75 quality indicators with 0–3 points assigned per indicator. If an institution achieves a score of 202 points or higher, it earns OLC’s exemplary program logo to display on its website. Institutions complete and submit a self-study that is evaluated by three reviewers who provide feedback and recommendations within three to four weeks. Institutions then have two months to implement the recommendations or provide additional evidence and artifacts if they wish to improve their score. The 75 quality indicators are spread over nine areas:

- institutional support
- technology support
- course development and instructional design
- course structure
- teaching and learning
- social and student engagement
- faculty support
- student support
- evaluations and assessment

### **UNITED STATES DISTANCE LEARNING ASSOCIATION’S DISTANCE LEARNING QUALITY STANDARDS CERTIFICATION**

To complete the USDLA’s Quality Standards Certification process, an online program has to have been in existence for a minimum of two years. The program submits a self-study, but the process also includes an on-site visit. Certification, after an institution successfully achieves it, lasts for five years, although there are annual reviews. The distance learning quality standards comprise 117 standards in five areas:

- provider prerequisites
- administration, leadership, and management
- learner affairs
- teaching and learning
- infrastructure

Making the decision to undergo a program- or institution-wide quality review will likely have resource and workload implications. Involving appropriate stakeholders early in the conversation is important. I suggest creating a team of institutional personnel to write the self-study and gather appropriate evidence and documentation.

As someone who has led the effort to complete one of these reviews, I highly recommend the process.

**Brian Udermann, PhD, has served as the director of online education at the University of Wisconsin–La Crosse since 2007. He is a frequent presenter at regional and national conferences, speaking on a variety of topics related to online learning.**

# A New Approach to Online Faculty Development from World Campus

Chris Hill

There is a movement in education to change the way the knowledge and skills that students acquire are assessed—a movement toward a more personalized and performance-based assessment.

There has been a parallel trend in professional development for teachers. Says one scholar, “New adult learning models are creating the potential for personalized preparation and development pathways for teachers. As student roles change . . . teacher preparation and professional learning should evolve accordingly.”

Studies show that faculty development affects student learning, faculty and student satisfaction, and retention rates. Although faculty development programs often train faculty to understand online teaching competencies, they can be weak in assessing whether faculty can actually demonstrate those competencies in a classroom or online space.

Dr. Andrew Tatusko, assistant director of Penn State’s World Campus Faculty Development program, has been developing a holistic model of online teaching competence. This model builds in assessments of competence that can help close the gap between the performances of competency in training programs and the demonstration of these competencies in real-world contexts.

This faculty development model fuses research in competency-based curricula and the teaching for understanding (TfU) framework. The curriculum also breaks ground by using digital badging as a way to track and credential faculty achievements and progress.

Tatusko talked with *Distance Education Report* about how this model incorporates the knowledge and insights that are changing our conception of effective faculty development.

**DER:** *What is holistic competence? What distinguishes holistic competence from other ways of measuring competence?*

**TATUSKO:** Holistic competency looks at a greater set of skills one might need to perform at a high level in a given professional field.

In much of the literature, competence is a measure of the behaviors one demonstrates, such as communicating effectively with students or performing specific functions of one’s job, such as faculty posting in a discussion forum five of the seven days during the lesson week.

But what researchers in professional competence have learned is that there are far more attributes that one calls on throughout his or her professional development trajectory. One of these attributes is in the affective domain and determines how one’s beliefs and emotions affect one’s performance.

One common intervention to address this particular attribute is to introduce reflective practice and self-assessment into professional development. But doing this effectively is a skill one must learn.

Another example is to better manage one's own network of resources and support structures. This can be difficult to do at a large university where the number of resources can be many but the paths to navigate those resources can be many.

Managing one's own development is a necessary component that has a direct impact on the level of support one can make use of, which then affects one's teaching and paths through successful research.

In a way, holistic competence looks at the conditions that affect one's teaching as areas in which to develop expertise as well as the teaching behaviors and professional functions themselves.

**DER:** *What is faculty development "based on competencies"?*

**TATUSKO:** Faculty development based on competencies looks at clusters of teaching behaviors, professional functions, knowledge, technical skills, and so forth to support improved teaching and research progress in faculty career paths.

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*Holistic competency looks at a greater set of skills one might need to perform at a high level in a given professional field.*

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Our Online Faculty Development unit at Penn State focuses most strongly on what makes an effective online teacher, and so we are exploring what competencies are necessary and desired to improve student learning and progress toward degree completion.

In so doing, we are looking less at what courses faculty need to complete and are focusing more on the skills they require to improve aspects of their teaching. By breaking up the traditional course structure, we are hoping to target what faculty need more directly, taking into account not only the knowledge and skills they are bringing to the table from their previous experiences but also a more effective way to reduce time spent on support they might not need.

For example, a new faculty member at Penn State who has extensive experience in online teaching at another institution might not want to sit through an entire course on the effectiveness of online teaching if half of that course focuses on skills and knowledge with which he or she is familiar and has already practiced well.

If we can cluster competencies in a more targeted way outside of the traditional course structure, we can be more effective in how we support faculty at different points in their careers.

**DER:** *What did you see lacking in existing approaches to online faculty development that you are trying to correct in your program?*

**TATUSKO:** Our previous program had two weaknesses. The first was that while we had a core set of five courses for faculty to earn a certificate for online teaching, the path for what to do beyond this program was not clear.

The second problem was—and still is—that as the population of faculty we support includes more contingent and fixed-term (adjunct) faculty, the experience and breadth of online teaching practices those faculty are bringing to the institution are increasingly varied. This makes it harder to predict what faculty need when they come to us for the first time.

So by framing our program in terms of clustered experiences based on program-specific or individual needs, we can be more nimble in what we offer and help faculty navigate a program path that is more directly applicable to the skills they believe they need to improve.

In addition, we have been working with a growing group of faculty who teach our current offering of courses in online faculty development. We are working on the hypothesis that teaching a topic area produces the deepest learning of that material. By making our work of teaching part of the overall development program, we are adding different levels of expertise and incentives to progress through our offerings. This invites opportunities for faculty to mentor both other faculty and graduate students new to teaching online.

**DER:** *What is the teaching for understanding framework? How does that fit into your program?*

**TATUSKO:** The teaching for understanding framework (TfU) was developed in the late 1990s at Harvard as a way to measure what students know through learning performances.

The idea is that we offer students activities that are rooted in real problems, scenarios, and projects that prompt an application of knowledge in practice rather than testing on discrete topics.

TfU is useful because it asks students to use what they know in performances that are flexible, requiring them to use their “knowledge on tap” to complete the activity.

Where we use this in our programs is in giving faculty scenarios that they will encounter in their teaching practice—developing course materials, working through problems like student conflicts, or creating assessment tools and evaluating each other’s work, even as the course instructor evaluates each participant’s contributions.

This closes the inference gap between what teachers believe about their teaching with what they can actually do in practice. How well this works when they begin teaching online courses is something we are currently researching with a cluster of graduate students new to online teaching.

**DER:** *Can you show us a curriculum map of your course?*

**TATUSKO:** We do not have a full curriculum map yet, but we do have a general idea of the progressions that we’re developing around competencies.

We’re using an online teaching certificate for graduate students that we completed in fall 2015 as a kind of test for what a core course for beginning online faculty would look like. We used a set of competencies that we believe to be essential based on surveys and feedback from other courses over the years.

My initial title for the framework is the Online Teaching Experiences Pathways (OTEP), and it progresses faculty through three levels of clustered teaching experiences:

- **Equipped:** Faculty members have completed the essentials of an online teaching program (which may be a revised version of the current graduate student certificate program).
- **Exemplary:** Faculty members have completed experiences where they have demonstrated at least 50 percent of other competencies not included in the essentials experience.
- **Expert:** Faculty members have completed all competencies and taught at least one course or led at least one other program for faculty development.

**DER:** *Who developed these courses? Who teaches them?*

**TATUSKO:** Development of these courses has been a major collaborative effort of our faculty development unit with the help of World Campus Learning Design; the Penn State Teaching, Learning, and Technology unit; Student Disability Resources; the Commission for Adult Learners; World Campus Military Team; Public Broadcasting; and Advising and Student Support.

Currently, we have online faculty who have completed our five-course certificate for online teaching program teaching our courses.

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*The teaching for understanding framework was developed in the late 1990s at Harvard as a way to measure what students know through learning performances.*

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**DER:** *Are you using badging in your program now? How do you earn a badge?*

**TATUSKO:** We piloted the use of digital badges with the Graduate Online Teaching Certificate program in the fall of 2015. A digital badge is simply a way to credential one's competence in a way that attaches that credential to the evidence that was submitted.

In traditional transcripts we get a grade for a course, but there is no information that explains what that grade means. With a badge, as with e-portfolios, the evidence that culminates in the earning of a credential is part of the credential itself. It gives much greater meaning to the certificate.

**DER:** *What are the most important principles or concepts in how you've built your program?*

**TATUSKO:** The most important principles are that we want to give faculty useful experiences that will help them improve their online teaching. And we want to give them the experience of what it is like to be an online student at Penn State.

A big part of the program is to demystify what online learning looks like.

Moreover, we want our programs to be research-based, and we want to be rigorous with what we are offering faculty members so they can participate in the ongoing development of our online programs.

**Christopher Hill served as as managing editor of *Distance Education Report* and is the editor of the *Academic Leader Today* blog.**

# OLC Effective Practice: The Fine Art of Assuring Quality in Online Education

*Melanie Shaw, PhD and Witt Salley, EdD*

Clemson Online staff identified an opportunity to create tools and support to further the fine art of online education at the University. Three distinct processes were developed: CONCERT, an asynchronous online training for faculty; ENCORE(S), a course certification rubric designed for a positive user experience; and BACKSTAGE, a checklist to ensure effective online delivery. This article outlines the specifics of each tool.

## DESCRIPTION OF THE EFFECTIVE PRACTICE

In the spring semester of 2014, Clemson Online conducted an audit of all courses offered online by Clemson University. The audit involved the search of each course to ensure the following guidelines were met:

- National quality benchmarks for online course design
- Compliance with accreditation standards
- Authentication of student identity
- Security and retention of institutional and student data
- Substantive faculty-student interaction through adopted technologies

The analysis revealed that of 141 online courses offered in the spring semester of 2014, only 37 of those courses were compliant; 40 courses were categorized as correspondence courses, and 64 courses could not be located in the learning management system. As a result of the audit, Clemson Online staff identified a need to train faculty to develop and deliver online content. From this audit, CONCERT, ENCORE(S), and BACKSTAGE were born.

Based on the disappointing outcome from the audit of online courses, it was clear that an organized initiative was needed to ensure quality and excellence for all online offerings within the university. Clemson Online staff developed a threefold approach to address the quality gaps identified in the audit.

First, six-week faculty certification course was developed for those wishing to teach or create online content. Then, a review process was initiated to ensure quality online course development processes. Finally, a checklist was developed to support faculty in delivering excellent online content. These threefold approaches were named CONCERT, ENCORE(S), and BACKSTAGE.

## CONCERT

Clemson ONLINE CERTification (CONCERT) was developed as a six-week course required for all faculty teaching or developing courses online for the university. The course was offered entirely online in an asynchronous format to allow for maximum flexibility. Each week, faculty spent approximately 3–5 hours on the training. In this course, faculty engaged in content spanning three modules:



1. Design and Develop — In this module, faculty learned fundamental skills to design and develop courses in an online format. Information included technology, best practices, and strategies to create engaging content for an online course.
2. Deliver and Teach — In this module, faculty explored strategies to provide quality online instruction. They explored pedagogies appropriate for the online environment and identified ways to engage and encourage student success.
3. Assess and Improve — The final module included a focus on ways to evaluate student mastery of content through assessment, effective grading practices, and quality feedback. In addition, there was an exploration of continuous improvement for online effectiveness and growth.

## ENCORE(S)

After faculty completed CONCERT, they were invited to continue in their online course development either autonomously or in partnership with a course development leader, who was trained to support faculty throughout the course creation process. Once they had developed their courses, faculty were asked to submit their course for a peer review using the Quality Matters (QM) Rubric. Unfortunately, many faculty resisted the lengthy QM review process and the feedback they received. Clemson Online staff decided to explore alternatives to the QM process to achieve the following aims:

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*The analysis revealed that of 141 online courses offered in the spring semester of 2014, only 37 of those courses were compliant; 40 courses were categorized as correspondence courses, and 64 courses could not be located in the learning management system.*

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- Offer faculty involvement prior to review. Self-review and comments prior to peer help highlight noteworthy features in an online course.

- Account for compliance issues. An online review process should also observe that compliance needs are addressed: substantial interaction, Learning Management System (LMS) usage, faculty-initiated interaction, and grading in the LMS.

- Review for newly developed courses and mature online courses. QM was intended for courses that

had been taught two or more times; Clemson Online sought to ensure quality from the first online offering and beyond.

- Reduce the number of syllabus-related standards in relation to course content. By changing from a QM-based approach, where more than 30 of standards measured were syllabus-related, a more efficient review process coincided with an online syllabus template.
- Respond to changes and new research. Attention to visual design and layout should be included in the review process along with an emphasis on other areas that have gained attention through research on innovative approaches.
- Account for course-level and discipline-specific variations in relation to student population. As noted by Clemson faculty, student needs vary by course level and discipline; therefore, an online review tool should respond accordingly.
- Recognize superior quality indicators. Innovative and other engaging qualities may include attention

to mobile learning, advanced use of social learning tools, interaction with others beyond the online classroom, online badges, student multimedia presentations, field research, digital game-based learning, proficiency-based learning, computer apps, or other learning applications.

- Offer a cost-effective model in an information-sharing age. By saving on QM subscription costs, reviewer training, and training materials, a more efficient and cost-saving model could be utilized.
- Provide an additional method of review for online course delivery metrics. Online student evaluations (or surveys) focus on the instructor facilitation of the online course and serve as a major contributor to the student experience; unlike QM, an online review process should prepare for and include a measure of key qualities of online delivery.

In the fall term, faculty were offered the chance to have their newly developed online course reviewed using the new ENCORE(S) process, which included the following criteria:

- experience of students
- navigationally sound design
- collaborative learning
- ongoing faculty presence
- relevant application
- engaging content
- superior qualities

## BACKSTAGE

As a follow-up to the course certification that results after ENCORE(S), Clemson Online staff developed an additional quality checklist to be conducted while the online course is being delivered. While this tool has not yet been deployed, it is designed to ensure quality online teaching and interaction. The checklist includes the following criteria:

- Before course starts—Course syllabus, welcome announcement, and first module available to students before course start date. Instructor initiates welcome e-mail or phone contact with students prior to course start.
- Acknowledgment of students—Each student is individually welcomed to the course by the faculty. Faculty individually addresses student performance and participation needs. (Analytics in course may be utilized.)
- Cues to direct online activities—Students are provided guidance to respond to online discussions via faculty facilitation and participation. Students are given feedback about their participation in the discussions.
- Key dates identified—Dates and deadlines for current course offering are identifiable in the course calendar.
- Student-to-student and faculty-to-student interaction—Students respond to one another as part of the discussion requirements. Faculty engages students in the discussion forums. Faculty provides feedback to students on assignments, referring to a rubric or project guidelines whenever possible.

Faculty clearly indicates how grades are derived for assignments.

- Timely feedback—Faculty grades course assignments within one week of submission (sooner for a compressed course or longer for graduate-level courses).
- Faculty promotes use of Q&A forum and responds to questions within 36 hours. Faculty responds to student e-mails in 24–36 hours.
- Announcements throughout course—Announcements are posted at least weekly—and ideally more frequently. Announcements convey important information about the course.
- Grades in LMS—Assignment and final grades are organized and captured within the LMS. Feedback from faculty is included with student scores for easy student access.
- Emerging strategies and technologies—Delivery strategies and technology tools build community and promote learning. Students receive multimodal feedback (typed, audio, video, or other).

## EVIDENCE OF EFFECTIVENESS

To date, over 200 faculty have participated in CONCERT. Of those, 134 successfully completed the training and received online faculty certification. Because Clemson Online started with QM as the review tool, 26 courses were certified through this process. Since the transition to ENCORE(S), faculty have indicated a more rewarding review experience. Since implementation of the ENCORE(S) process, 13 courses have been reviewed and two have achieved certification. Going forward, all courses will use the ENCORE(S) process.

ENCORE(S) has been normed to ensure interrater reliability. Norming groups included faculty as well as staff/administrators of online faculty development at Clemson and other institutions. Further, an ENCORE(S) reviewer certification is under development. All of the courses developed lead to new or expanded online certificate or degree programs; improve options for students; coordinate well with existing online courses or programs; have market appeal for both Clemson students as well as transient students (i.e., students at other institutions); and have the potential to lead to significant enrollment and tuition revenues. While this three-fold approach continues to evolve, Clemson Online is pleased with early feedback from faculty regarding their experiences developing and delivering online content after engagement in these processes. CONCERT, ENCORE(S), and BACKSTAGE have furthered the fine art of assuring quality in online education.

## COSTS ASSOCIATED WITH THIS PRACTICE

The only cost is in the resources used for CONCERT training and reviewers for ENCORE(S) and BACKSTAGE, which is approximately \$2,000 per month at the current rate of delivery at Clemson University. Costs will vary depending upon the scope of implementation.

*Melanie Shaw is assistant dean, dissertation faculty, at Northcentral University.  
Witt Salley is dean, school of online education, at Virginia International University.*

# Five Key Factors for Administrators for Evaluating Online Teaching

*Thomas Tobin, PhD*

Rich, a faculty member, was preparing his portfolio for the tenure and promotion process, and he asked his department chair, Janet, to observe his online marketing statistics course.

Janet asked the campus Teaching and Learning Center a question: “We just need to know one thing. Our classroom observation form has an item, ‘Instructor demonstrates enthusiasm.’ How can instructors demonstrate enthusiasm in online courses? The students can’t see the professor or hear his voice.” After some conversation, two pertinent facts emerged:

- This would be the first time anyone in the entire college would do an administrative observation of an online course. Even though the department had offered online courses for several years, they were not yet part of the observation cycle already set up for face-to-face teaching.
- Janet had not developed or taught online courses herself. Janet was unsure which items on the department’s observation form might apply to online teaching, and she was skeptical whether some items could be observed at all, given the nature of online teaching.

Today, we are in a unique window in time where many administrators’ teaching experiences are significantly different from the teaching modes of their faculty members. Although some department chairs and deans have taught online courses themselves (and thus have a feel for the challenges and flow of online teaching), many more administrators have conducted their teaching careers exclusively in the face-to-face classroom. Those who moved away from teaching into administration before the late 2000s are especially unlikely to have taught courses in modes other than face-to-face (McCarthy & Samors, 2009). In some ways, newly minted administrators may have an advantage over the veterans, at least with regard to observing and evaluating online teaching.

Instead of looking for specific behaviors or affective elements of the instructor (such as “speaks clearly” or “maintains the interest of students”), administrative observers like Janet can employ modality-neutral, measurable criteria for evaluation by focusing on instructor behaviors.

In their seminal research, Chickering and Gamson (1987) and Chickering and Ehermann (1996) analyzed a wealth of research on good teaching, creating seven core, modality-independent principles of effective teaching practice:

- Encourage student-faculty contact
- Develop reciprocity and cooperation among students
- Use active learning techniques
- Give prompt feedback
- Emphasize time-on-task
- Communicate high expectations

- Respect diverse talents and ways of learning

There is no equivalent in an online course to the 50- or 90-minute period typical of face-to-face observations. Face-to-face courses are fixed in time and place; those are the “givens” of the observation. The givens for online courses are the online environment itself. In order to assist administrators who are observing online courses, agreement should be reached on five key, measurable factors:

- Definition of teaching practices
- Communication between observer and observed
- Which elements are in bounds
- Duration of the observation
- Assistance available to the observer

**1. Definition of teaching practices:** A set of lecture notes that presents information—in the manner of a textbook or article—is part of online course design and would not be considered in an administrative obser-

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*Today, we are in a unique window in time where many administrators’ teaching experiences are significantly different from the teaching modes of their faculty members.*

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vation of the online course. Likewise, videos and audio podcasts are also part of an online course’s materials and do not count as observable teaching behaviors. However, if an instructor responds to students an online course discussion by posting a minilecture or video to explain a concept, that certainly counts as an observed teaching behavior. The content is created or shared as a result of interactions between the learners and the instructor. The overall distinction

to apply is one of information presentation versus interaction.

**2. Communication between observer and observed:** Instead of providing copies of documents (which, de facto, may be accessible during the online observation), online instructors should communicate ahead of time to observers about where they may focus attention or about elements unique to the context of the instruction, especially if the course interactions are in different places than, or go beyond, typical places where interactions occur.

**3. Which elements are in bounds:** Many online course elements may be considered teaching practices or part of course design, depending on structure and function. It is possible to identify elements of online courses

- that are always counted as teaching practices (e.g., discussion forums, group-work areas, and feedback on student assignments);
- that may be counted as teaching practices, depending on structure and interactivity (e.g., supplemental materials, spontaneous minilectures, news/announcement items); and
- that are never counted as teaching practices (e.g., preconstructed lecture content, graded tests/quizzes, major course assignments, links to websites, and content created by third parties like textbook publishers).

**4. Duration of the observation:** The observer’s time examining the online environment does not correlate directly to the time spent observing face-to-face meetings covering the same content. Allow the evaluator access to the online course environment over a set period of days, and communicate time expectations up front. For example, Penn State University advises evaluators to observe for two hours toward the end of the semester, so that there will be a rich set of interactions to evaluate (Taylor, 2011). This helps observers to know how much detail is required for completing a thorough observation.

**5. Assistance available to the observer:** Administrative observers may not be skilled at navigating the online course environment. Agreement about the availability, extent, and role of technical staff is needed prior to the observation. Determine the area(s) of the institution from which the technical assistants should come. For example, observations may be facilitated by teaching and learning center staff. The continuum of assistance can range from fully embedded (where the assistant is at the keyboard all the time and takes direction from the administrative observer) to consultative (where the administrative observer is at the computer and the assistant offers verbal help) to on-call (where the assistant is not initially involved in the observation and is brought in only if the observer requests help).

Make clear that any assistance offered is facilitative in nature and not evaluative. For instance, a technical assistant may show the evaluator an online course’s discussion forum and may mention that the instructor appears to be responding at the rate of about one message per 10 student messages. The assistant should not, however, provide evaluative or comparative advice during the observation.

## CONCLUSION

When the technology coordinator finally met with Janet to help prepare her to observe Rich’s online course, the coordinator proposed a plan to help her to narrow down the work that they would need to do before, during, and after the observation. The plan included specific requests that Janet would be able to make of Rich prior to the observation, such as getting a copy of his course syllabus and any supplemental materials. The coordinator also suggested that Janet observe a single unit of material—one that had already been completed—so she could get a good overall experience of being a student in the course. Finally, the coordinator scheduled time to give Janet a general introduction to the university’s online learning environment so she would know what to expect and be better able to decide where to look within the environment to observe the various criteria in the department’s observation rubric. Janet left the consultation feeling better prepared and confident that her online-teaching observations would go smoothly.

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**Thomas J. Tobin is a faculty developer and professional consultant in State College, Pennsylvania. He is an internationally recognized speaker and author on topics related to quality in distance education, especially copyright, evaluation of teaching practice, academic integrity, and accessibility/universal design for learning.**

# Applying the OLC Quality Scorecard: Lessons from Karen Pedersen of OLC

Jennifer Patterson Lorenzetti, MS

Online learning is poised to bring great changes to the world of higher education, and Karen Pedersen is helping lead the way. As the new chief knowledge officer of the Online Learning Consortium (OLC; formerly the Sloan Consortium), she is prepared to bring her career-long experience in delivering courses at a distance to her new position.

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*The Quality Scorecard is not a tool to be used and then discarded. It is intended to help institutions understand and improve their delivery of online education on an ongoing basis.*

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Pedersen has been in her new position a short time, but she has already seen many new innovations come from the OLC. The OLC has hosted its first “Collaborate,” an innovation in the way it offers conferences. The Collaborate model offers regional, one-day get-togethers that Pedersen describes as “drive in and drive out.” She notes that this keeps the energy level high and “allows for intense engagement.”

Also in her brief time in office, Pedersen has seen the merging of MERLOT’s *Journal of Online Learning and Teaching* and OLC’s own *Journal of Asynchronous Learning Networks* to form *Online Learning*. This combined journal offers an opportunity to remain at the forefront of thought leadership in the field of online learning.

## THE QUALITY SCORECARD

One of the most important tools from OLC is the Quality Scorecard for the Administration of Online Programs. Pedersen explains that the scorecard was born out of doctoral work by Dr. Kaye Shelton, currently an online education consultant, whose 2010 dissertation proposed such a scorecard as a result of a Delphi study. The scorecard looks at online programs from the institutional and programmatic level, not the course level, allowing it to take a broader view at the administrative level of an institution’s online offerings and how well they are working.

The scorecard comprises 75 questions in nine categories:

- institutional support
- technology support
- course development/instructional design
- course structure
- teaching and learning

- social and student engagement
- faculty support
- student support
- evaluation and assessment

Each category includes a variety of questions that can be answered on a four-point Likert scale, with 0 indicating deficient and 3 indicating exemplary. For example, the evaluation and assessment category asks institutions to rate themselves on this statement: “A variety of data (academic and administrative information) are used to regularly and frequently evaluate program effectiveness and to guide changes toward continual improvement.” One of the items in the teaching and learning category asks for a rating on the statement, “Students learn appropriate methods for effective research, including assessment of the validity of resources and the ability to master resources in an online environment.”

The tool is available for any individual or institution to use by visiting the OLC website (<http://onlinelearningconsortium.org/consult/quality-scorecard/>) and downloading the PDF version of the tool. An interactive online version that allows users to upload documentary evidence of their progress on each of the 75 items is available to OLC members.

Institutions may also request an institutional review from OLC, in which a three-person panel will analyze their scorecard results and evidence to help institutions learn more about their strengths and weaknesses.

Pedersen recommends institutions use the scorecard in conjunction with events like accreditation visits. The tool can help an institution organize the self-study portion of the reaccreditation process, and Pedersen notes that “accreditors appreciate” seeing evidence of institutions identifying their own opportunities for improvement and making a plan to address these areas.

The Quality Scorecard is not a tool to be used and then discarded. It is intended to help institutions understand and improve their delivery of online education on an ongoing basis. “Think of it as a journey,” Pedersen says. The scorecard helps institutions “think about online learning from a global perspective,” looking at the institution’s entire array of offerings.

The process may also help institutions become familiar with their own data collection and storage processes, which is something institutions typically find challenging. “They often struggle the most with the evaluation and assessment category; they need to bring the data to the table but the data rest in a lot of different places, such as institutional research and the provost’s office,” Pedersen explains. Completing the scorecard will help institutions see the wealth of data they have at their disposal.

The Quality Scorecard will not be the only product to help institutions in self-assessment. “We’re doing work to build out a series of score cards,” Pedersen says, explaining that there are “things happening on campuses that are not totally online” that still would benefit from assessment tools. She notes that OLC is asking for participants to join a Delphi study to help develop these tools.

OLC is also planning to do a study looking at the K-12 arena because “a lot is happening at that level,” Pedersen says. Many of these things will directly impact higher education. For example, OLC notes that “elementary students [now] learn keyboarding skills over cursive handwriting” and some 99 percent of high schools students “will soon get broadband access regardless of income.” All of these changes at the K-12 level will have implications for higher education.

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