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THIS WEEK: Design Strategies

The Instructional Design of Learning Objects

By Joanne Mowat

To deliver the focused and current training that rapidly changing business environments require, some organizations are implementing a reusable learning object approach to instructional design. As well as using this approach to create new learning products, some organizations are also redesigning existing learning products into learning objects, in order to standardize those learning products and to create a large enough database of learning objects to enable reuse.

Existing instructional design (ID) models may not always meet the needs of learning object design projects, and so, in my organization, we developed a ten-phase model. The model covers both the design of learning objects from new content and the redesign of existing content into objects. In the development of this model, we took care to ensure that we did not sacrifice the rigor provided by traditional ID models and that the designers kept the focus on the learning design rather than the delivery technology.

By ensuring that instructional design is the cornerstone of learning object development, we learned how to create and maintain consistency between assets and objects and in the structuring and presentation of content. As George Siemens points out (see the References at the end of this article), an effective learning object instructional design model or process can guide high quality and accelerated product development as well as the rigorous project

Learning objects have been a topic of interest for several years, but until now it has been difficult to locate information about a systematic learning object development process. Designers face the task of coordinating a considerable effort when they undertake a project that involves object production. This is especially true when the project also requires re-use of existing materials and content. This week's article solves that problem, with a comprehensive ten-step process that you can put to work immediately!

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management required in any technology-related project. In this article, I will show you our model and explain the ten phases.

Learning objects

Learning objects, as Warren Longmire defines them, are digitally-managed and digitally-delivered, context-independent, transportable, and reusable pieces of instruction that meet the requirements of a terminal learning objective. Chuck Barritt and F. Lee Alderman further explain that learning objects are "authored in small pieces, assembled into a database, and then delivered to the learner through a variety of delivery media." This means that designers and developers can transfer learning objects to other departments or organizations, that any application can run the objects, and that diverse learner groups can use them. In order to be transportable, learning objects must be:

- Free of any reference to other objects (no reference to pre-requisites or co-requisites)
- Non-sequential (no presumed sequence of objects)
- Free of transitions (links to other objects)
- Self-contained

Designing learning materials as learning objects makes it easier to reuse content, rather than recreating it each time the designer needs that content in another topic, lesson, module, or course. Once created, the developer can reassemble learning objects and assets to create new courses, or use them individually to create or supplement individual learning paths. (See the online articles by Paul English and David Wiley, cited in the References.) The design approach supports rapid and cost-effective development of content that is consistent while at the same time reducing maintenance costs. Benefits such as these have led to corporations being interested in adopting a learning object approach to design. David Wiley noted the promise of learning object technology for instructional design, development, and delivery, due to its potential for reusability, generativity, adaptability, and scalability.

Definition

One of the most widely accepted definitions of learning objects is "digital entities deliverable over the Internet." However, the Learning Technology Standards Committee (LTSC) of the Institute of Electrical and Electronic Engineers (IEEE) allowed for non-digital content in their definition: "any entity, digital or non-digital, which can be used, reused or referenced during technology-supported learning." This definition also specified that a learning object is a self-contained

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learning component made up of smaller reusable assets. The learning object meets the needs of a topic or complex task, and it satisfies one terminal objective. Users can store and access the learning object independently.

Assets

Assets are the smallest piece of instruction or information that makes sense on its own. So an asset might be, among other things, a systematic procedure, a concept, or a video segment showing a process. On their own assets may be informational, but when combined they can become a unit of learning.

Assets are also transportable and reusable. For example, employees may often use assets for support at the job-site as moment-of-need access to procedures, explanations, references, or modules of learning covered during a learning event. To ensure flexibility of use, authors must design assets to the right level of granularity. An asset should be the optimal size to meet the learning need, any related performance need, the requirements of multiple audiences, and deployment in a variety of timeframes.

Metadata tags

Every object and every asset has two components: the object or asset and its metadata tag, also called a meta-tag. The meta-tag is the mechanism that allows quick and efficient location of objects and assets. This tag provides context in the form of descriptions and keywords. The tag makes it possible to manage the objects and assets in the database and to populate them into the display templates. Learning objects and assets with effective meta-tags facilitate content maintenance, search, and management. They also allow for immediate customizing of content based on criteria that the performer selects.

Instructional design models

Instructional design concepts influence learning creation through instructional design models, each of which represents a view on how humans learn. These models are the guidelines by which instructional designers create instruction. As Kent Gustafson and Robert Branch explain, they help designers conceptualize a process or system by simplifying complexities of real situations into steps that you can apply in many contexts.

Dee Andrews and Ludy Goodson, as well as Walter Dick, found that there is an agreement among instructional design models on a set of generic steps or components representing a generalized and logical flow for systematic problem solving. Barbara McCombs points out that while the number of steps in a model may differ, the steps cover the same actions, are general, and have the same logical flow. Gustafson and Branch note that the steps "provide us with conceptual and communication tools that we can use to visualize, direct, and manage processes."

You can think of instructional design as both a science and an art. I intend the model I am presenting to act as a road map through analysis, design, development, implementation, and evaluation to the goal of effective instruction using learning objects. The instructional design road map (the science) provides a route to many different destinations depending on the turns (the art) chosen. In the words of Norbert Seel and Sanne Dijkstra, as an instructional designer you will apply science, artistry, and creativity to the process. You will make assumptions based on psychological theories of human learning, on the knowledge structures the learner will require, and on the cognitive processes the learner will use. In the end, this

[A]n effective learning object instructional design model or process can guide high quality and accelerated product development as well as the rigorous project management required in any technology-related project.

model can only provide structure and guidance. It is you, the instructional designer, whose decisions and actions will create effective instruction and learning experiences.

Instructional design model for learning objects

As shown in Figure 1, the Herridge learning objects instructional design model has ten phases. These phases incorporate and build on the generic steps found in most models. The steps in this model are:

1. Evaluate feasibility
2. Align team and plan project
3. Analyze need
4. Analyze functionality
5. Identify and eliminate duplicate terminal objectives
6. Identify enabling objectives
7. Design
8. Develop
9. Implement
10. Evaluate

Formative evaluation must be part of every phase in the model. The steps and the logical flow are reminiscent of those found in traditional instructional design models. What is different is some of the steps and the actions taken within steps.

As with many instructional design models, while Figure 1 may make the Herridge model appear to be linear and rigid, in reality it is iterative and flexible. Iterative means the process involves moving backwards and forwards between the activities, and flexible means the model leaves it to the experienced designer to decide how much detail to supply at each step.

This model aligns with the contemporary view that instructional design is non-linear and adapts to the given situation. In other words, the real value of an instructional design model lies in the heuristics for instructional development and in the guidance provided through a meaningful framework for the development activities, not in a rigid prescription of exact actions within each step.

The phases

The designer should adjust the scope and importance of each of the ten phases in the model based on the project. It is important to use this model only after assessing a need and identifying a training-related performance gap. Project management, change management, risk management, and team communication underlay and continuously support all the phases. For each phase, I will describe why the phase is important, what the phase entails, and who is involved in the phase.

Phase 1: Evaluate feasibility

In this phase, carry out initial scoping, information gathering, and analysis to confirm that a learning object approach is economically viable, technically and organizationally (culturally) feasible, and valid to address the identified gap. Learning object designs are extremely effective when they are the right solution. They are also time-consuming and resource-consuming. Therefore, you must evaluate feasibility and identify potential ROI before beginning the project. This phase includes the following steps:

- Identify business and project objectives.
- Apply a feasibility analysis model that addresses economic, technical, organizational, and instructional feasibility issues. (This includes ensuring that both a classification and a tagging schema are in place.)
- Identify the criteria by which you will evaluate success, and gather baseline data.

It is important that the key roles on the project team all participate, to various extents, in establishing the feasibility of the project. If possible, involve the following roles: instructional designer (with learning object design expertise), developer (with learning object design expertise), project manager, sponsor, and the client.

Remember that these are roles. One person may be taking on more than one role. For example, the instructional designer may also be acting as project manager, or the sponsor and client may be the same person.

The next three phases (Align Team and Project Plan, Analyze Need, Analyze Functionality) may occur concurrently.

Phase 2 Align team and project plan

Learning object projects require the input and cooperation of many different groups and skill sets. The success or failure of the project may hinge on the effectiveness of team interactions and project planning. This phase involves the following steps:

- Identify skill sets required for project. (Ensure that

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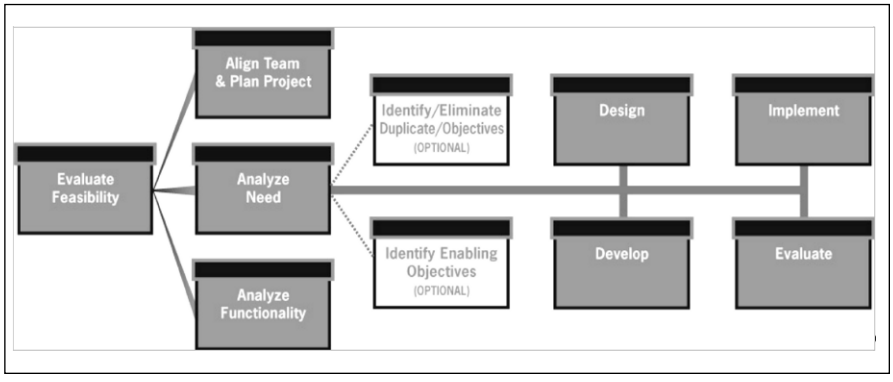

Figure 1
The Herridge Model for the instructional design of learning objects

the instructional designer and the developer both have learning object expertise.)
- Select team members based on skills required.
- Determine and document communication protocols.
- Determine and document team member roles and responsibilities for each project step.
- Determine and document the change management and scope management processes that the team will follow.
- Identify risks to the project, determine how likely the occurrence of each risk, decide what impact that risk could have on the project, and develop and document strategies to mitigate the risk.
- Decide on the project management tool and the process to follow.
- Draft first project plan and time line.

In this phase, involve the following roles at a minimum: instructional designer, developer, graphic artists and technical writers (if required for the project), subject matter experts, the client, and the sponsor. Anyone who will be working on the project, at any stage, should be included in the initial team meetings and in the project planning.

Phase 3: Analyze need

In this phase, refine and clarify the information gathered during the needs assessment. In addition, you will need to gather the next several levels of information required for the design, production, and implementation phases. This phase includes the following steps:
- Job analysis
- Task analysis
- Learner analysis
- Analyze defined performance gap.
- Analyze any available information on previous learning object implementations in the company.

The output of this phase is a needs analysis report. In this phase the instructional designer will be interacting with subject matter experts and the client to perform the necessary analyses, define and gain agreement on the gap, and gather any extant data that may support the project.

Phase 4: Analyze functionality

In this phase, analyze intranet and extranet, delivery (desktop) hardware, and available software for opportunities and constraints. Include an analysis of the Learning Content Management System (LCMS) that will store, disseminate, and display the learning objects. These are the steps in this phase:
- Analyze platform from which learners will be accessing learning. (Browser, bandwidth, etc.)
- Identify and analyze software options for develop-

ment in terms of flexibility, applicability to the intervention to be developed, and ease of conversion to XML.
- Analyze capabilities and constraints of the LCMS.
- Choose authoring tool(s) for production and for prototyping.
- Analyze classification and tagging schema used in the organization. If there are none, create these during this phase.
- Identify XSL style sheets available for both performance support and learning. Determine if additional style sheets might be required.

In this phase the instructional designer will be interacting with the information technology group responsible for infrastructure, standards, applications, and security. It would also be a good idea to involve someone who has had experience with the LCMS from both a user and a designer point of view. Another key person in this phase will be the Web developer since this person will need to code and tag the objects to work within the LCMS.

Phases 5 and 6: Identify and eliminate duplicate terminal objectives, and identify enabling objectives

Phases 5 and 6 apply only when you must create learning objects from existing content. Phases 5 and 6 together consist of five steps, as shown in Table 1. These two phases in the model support instructional designers who are redesigning existing learning products into reusable learning objects. Note that you would only redesign existing content if the content is complete, accurate, effective, and still required.

As mentioned earlier, many organizations implementing a learning object approach find that in order to standardize the learning products, and to create a large enough database of learning objects to enable reuse, they need to redesign existing learning products into learning objects.

To redesign existing content into learning objects one must first understand and document the terminal and enabling objectives that form the basis for the existing content, the relationship between the objectives, and how the objectives from the existing content could and should be organized when creating the learning assets and objects. In almost all cases, as part of the redesign process, you will identify redundancies and opportunities for improvement. This will result in the removal and adjustment of terminal and enabling objectives.

During these two phases the steps and activities in Table 1 occur.

The instructional designer will do much of the work in this phase. However, the designer will obtain input on the accuracy, validity, and completeness of the terminal and enabling objectives, and, from the subject matter experts, on the content to use for development of assets.

The meta-tag is the mechanism that allows quick and efficient location of objects and assets. This tag provides context in the form of descriptions and keywords. The tag makes it possible to manage the objects and assets in the database and to populate them into the display templates.

Table 1: ***Steps in Phases 5 and 6***

1. Identify	2. Diagram	3. Validate and Eliminate	4. Document	5. Design
Identify the performance goal and the terminal, enabling and sub-objectives in existing content.	Create an instructional hierarchy of the performance goal and the objectives.	Validate that achievement of the terminal objectives will result in the achievement of the performance goal.	Using the Objectives Worksheet, document each terminal objective using a measurable and objective statement.	Design assets for each enabling and sub-objective appropriate for each object in which the asset will occur.
	Highlight duplicate enabling objectives that appear under more than one terminal objective in the hierarchy.	Eliminate duplicate terminal objectives.	For each terminal objective, document the related mastery question or performance standard.	
		Add any terminal objectives required to achieve performance goal.	For each terminal objective, document the supporting enabling and sub-objective using measurable and objective statements.	
		Update instructional hierarchy.	For each enabling objective, list all the terminal objectives that it supports.	
			For each enabling objective, indicate whether you will use the asset created for the enabling objective for performance support, learning, or both.	

Phase 7: Design

The design of learning objects, as with many design projects, involves several iterations of prototyping. This requires heavy input and review from the subject matter experts. While this extends the time required for the design phase, it also overlaps design with development and shortens the overall development cycle while providing a superior product.

Record the design in a learning object design document. This document must:

- Capture the design at the level of detail required if more than one designer is creating the assets and objects.
- Allow the designer to dictate both content and format.
- Display the design in a format that is easy for subject matter experts and clients to understand, thus facilitating review and sign-off.

The design phase is where the art of the instructional designer comes into play. During this phase the following steps and activities occur. Remember that many of these are iterative.

- List all the modules and the objects in each module. This should be the first section of the design document.
- List all the assets in each object. This is the second section.
- The third section of the design document should:
  - Organize the assets in the display template chosen for each object
  - Detail each asset including recommendations for creation in more than one medium
- Obtain sign-off on the design document from both subject matter experts and the client.
- Create the storyboard template.
- Use a joint application design (JAD) session to design the architecture, determine protocols and navigation, and obtain sign-off on objectives and the storyboard template.
- Determine which enabling objectives (assets) and which terminal objectives (objects) to prototype to ensure that each general type and approach is prototyped.
- Storyboard the first set of assets and have subject matter experts review storyboards.
- Prototype:
  - Program and test assets
  - Revise assets based on feedback from subject matter experts
  - Create prototype object from prototyped assets
  - Revise object based on feedback from subject matter experts
  - Storyboard next set of assets and the related object
  - Test dissemination of the prototype object through the LCMS
  - Obtain client sign-off on each object
  - Repeat the design, evaluate, and revise cycle for each object selected for prototyping

The instructional designer drives the design phase but is heavily supported by the developer (especially during prototyping), by any graphic artists and technical writers on the team, and by the subject matter experts. The client and sponsor should be involved at regular design review points, established in the project plan.

Phase 8: Develop

Based on the design document, storyboard each asset using a format agreed upon with the developers. Since the design document details the organization of assets into objects, this phase de facto creates the objects as well. During this phase the following steps and activities occur:

- Finalize development and production schedule.
- Produce storyboards for all assets and objects.
- Have subject matter experts review and provide feedback on each storyboard as it is developed.
- Revise storyboards based on feedback.
- Obtain client sign off on each revised storyboard.
- Program assets and objects in selected style sheet (Alpha).
- Validate each Alpha object with subject matter experts not involved in the project up to this point.
- Revise and revalidate.
- Test dissemination of the prototype object through the LCMS.
- Obtain client sign-off on each object.

The instructional designer creates the storyboards and the developer executes them, programming each asset and object, linking each with the correct style sheet, and applying the required metadata. Involve graphic artists and technical writers as needed. Bring subject matter experts and the client into the review of the assets and objects as they are created, and of the entire learning product once completed.

The next two phases, Implement and Evaluate, overlap since the first two levels of evaluation occur during Implement and provide input to the post-implementation report.

Phase 9: Implement

Before implementation, review and revise the implementation plan, likely created earlier in the project. Implement the learning product based on the plan. During this phase the following steps and activities occur:

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- Review and then revise implementation plan and schedule.
- Implement.
- Develop and submit post-implementation report.
- Act on post-implementation report recommendations.

The project manager and the client drive the implementation, supported by the instructional designer and the subject matter experts. Integrate feedback from the Level 1 and Level 2 evaluations into the post-implementation report, created by the project manager.

Phase 10: Evaluate

At a minimum, conduct Kirkpatrick's first and second level evaluations during or at the end of implementation. They provide data and input to the post-implementation report. When conducting the third level evaluation, measure results against the criteria for success established at the beginning of the project (refer to Phase 1).

During this phase the following steps and activities occur:

- Conduct first, second, third, and fourth level evaluations.
- Act on results.

The project manager and the client drive the evaluation. The instructional designer often creates and assesses the evaluation tools.

Conclusion

The instructional design model presented here for the creation of learning objects draws heavily on the rigor, iterative nature, flexibility, and consistency of traditional instructional design models. The phases, and the flow through the phases, are very similar to what you are used to. What differs is the questions asked, the information sought, the decisions made, and the actions taken with the steps in each phase of the model.

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