



Three Episodes (In Place of a Preface)



Learning Objectives:

To state the author's backgrounds and viewpoints for Instructional Design.

To make the reader interested in learning from his text (right?).



Overview of the Three Episodes

Episode 1:

“Are there any instructional designers in this room?” @ ASTDTechKnowledge 2003
(At the newcomer session, an overwhelming number of hands were raised)

- Conclusion:

I am a traditional instructional designer from before the advent of e-Learning.

Episode 2:

“Instruction is part of the old paradigm. Learning is the way of the future.”
@ KSET2003 (Harasim's objections to Reigeluth's address)

- Conclusion:

Instruction is not (just) telling. It is setting in place internal and external requirements for the attainment of objectives, including the design of learning environments.

Episode 3:

“Balanced score cards and ID are the two pillars of our company's human resource development.” @ SIGEDU Case Studies Session 2003 (Presented by Ricoh Techno System Co., Ltd.)

- Conclusion:

Knowing ID brings to light other solutions than e-Learning material development. ID can also be used to create Human Resource Development division capable of offering solutions beyond training.

Episode 1:

“Are there any instructional designers in this room?” @ ASTDTechKnowledge2003 (At the newcomer session an overwhelming number of hands were raised)

I studied Instructional Design (ID) at Florida State University in the United States for four years from 1983 to 1987, where I acquired a doctorate degree (Ph.D. in Instructional Systems). There I was taught by Professor Robert M. Gagné (passed away in 2002) and Professor Leslie Briggs (passed away in 1985 still serving as a professor), who are widely recognized as being the founders of ID. I also took a course from Professor Walter Dick (retired in 2003), who is universally known as the author of the most popular introductory text on ID process.

In 1987 when I returned Japan, it was still the dawning of the Internet, and an age when the phrase “e-Learning” did not even exist. The latest technology of the time included branching instructional materials with video images controlled by a computer-controlled laser disc (LD), and computers that used five inch floppy discs. In short, I am an instructional designer who learned ID before the advent of e-Learning.

I was a complete novice who did not know anything about e-Learning when I was asked to give an intensive lecture on ID as the foundational theory for e-Learning. I knew about ID, but I didn’t know what was going on under the name of e-Learning. This was about one year ago in 2002 (now, while I take pride in having shed my common ‘novice’ status through diligent study, I am not yet at the stage of confidently call myself an expert on e-Learning). So, I attended TechKnowledge 2003, a conference sponsored by the American Society for Training and Development (ASTD), the world’s largest training research organization, to obtain the latest information of that time. The theme for the event was “Truth in E-Learning.” It was held in Orlando, Florida, a city famous for Walt Disney World, which is in the same state as Florida State University where I studied.

At TechKnowledge 2003, a total of more than 90 research sessions on a variety of the latest trends related to e-Learning were held over a three day period. One of the first programs was a “Boot Camp” session for newcomers. As a self-professed newcomer, I could not afford to miss hearing this, because it was claimed to be a “session to bring participants up to speed right away so that they can get the most out of the conference.” So I attended while still suffering from jet-lag. There were around 100 people attending the “Boot Camp” session.

At the beginning, the facilitator posed the question “Are there any instructional designers in this room?” More than half the hands went up (with me naturally raising my hand as well). “Quite a few of you. Well then, anyone among you knows almost nothing about e-Learning?” A fair number of hands stayed in the air (obviously my hand remained up as well). “You must be the traditional instructional designers then,” he said. “Yes, indeed, I am a traditional instructional designer,” I thought.

The rest of the people at the newcomer’s session were what you would call systems people: a group of people who had a technology background concerning e-Learning but knew nothing about ID. It was explained that “The main role of this session is to allow you to understand the terminology used by the other side,” and I was oddly convinced. Indeed, I was a traditional instructional designer. But, I asked myself, “Should I remain in the current state, or should I do a little studying here to transform into a different state of ‘traditional’?” Traditional may mean having a long career from before the advent of e-Learning, or in the sense of being old or obsolete. I decided then to try to be a traditional, but not obsolete,

instructional designer.

Back in Japan, instructional designers from before the advent of e-Learning are extremely sparse. While the term ID has come to be used liberally using *Katakana*, without translating it into Japanese, this mostly came from after e-Learning's advent. When ID is talked about, it is chiefly in terms of whether one can lay out a screen with good visual qualities, or in the need to ground usability research in a navigation so that the material would become easy to use. It is not uncommon for ID to be grasped in such terms, may be because the word "design" in ID has strong connotation of being good looking, easy to use, things. Cases like these just make me want to challenge by saying, "Wait a minute, what happened to the instructional aspect of ID?"

Since there have been no opportunities for studying ID in a systematic manner in Japan, unlike in the United States, instructional designer has not been established as a professional position in Japan. This is because the majority of people only began learning about ID recently, just like I only recently began studying e-Learning. Some say ID should serve as the foundation for e-Learning, asserting that providing a foundational training on ID is a pressing issue in order to expand good quality e-Learning in Japan. I was able to understand this view by having witnessed the opposite set of circumstances in the United States; knowing the foundations of ID, without knowing anything about e-Learning as a start of professional training. I thought I shall attempt to provide for those in the field of e-Learning a first step for learning about the basics of ID systematically (and in the context of e-Learning), because I came from the other side of the marriage between ID and e-Learning.

Episode 2:

“Instruction is part of the old paradigm. Learning is the way of the future.” @ KSET2003 (Harasim’s objections to Reigeluth’s address)

In June 2003, I attended an international conference of the Korean Society for Educational Technology (KSET) which was held in Seoul. Compared to Japan, South Korea has a broad class of ID researchers, as well as an extensive demographic of people with a strong command of the English language. Moreover, Professor C. M. Reigeluth from Indiana University, the researcher who has had the most profound impact on ID research over the past 20 years, was slated to come and give a keynote address. That being the case, I felt compelled to at least go and have a look.

During the period that I was studying in the United States, a book commonly referred to as the *Green Book* (Reigeluth, 1983) compiled by Professor Reigeluth was promptly adopted as a textbook of a graduate course at Florida State University. The book is an excellent work which introduces eight ID models representative of the age, and offers an extensive editor’s remarks for comparing the 8 models. His next book, commonly known as the *Yellow Book* (Reigeluth, 1987), is also an exceptional work. By juxtaposing 8 proposals for instructional materials with regard to a single subject of study (lens and microscope structure) using the eight ID models from the *Green Book*, the *Yellow Book* helps readers to gain a more concrete understanding of the models. The third book known as the *Green Book II* (Reigeluth, 1999) was an ambitious work that considerably broadened the number of ID models and their theoretical groundwork in seeking to discover ID’s future prospects. To me, he was an enigmatic figure who I had heard various rumors about, but had not yet had the chance to meet firsthand, and his appearance at KSET conference provided a long-awaited opportunity to do so.

Incidentally, KSET has around 1,500 members (while the Japan Society for Educational Technology (JSET) has 2,000), with the number of researchers who acquired doctoral degrees in the United States and then returned home exceeding 70. To the best of my knowledge, this number is in the single digits for Japan, which has people of this sort. This can give you an idea of how broad the demographic for ID researchers in South Korea is. The keynote address by Professor Reigeluth at this conference came about through an invitation by South Korean researchers who obtained their doctoral degrees at Indiana University before returning home (there are several dozen of them, giving them the highest majority present). I was able to meet several alumni who had graduated from Florida State University (they seem to be the second most common in South Korea), including Professor Yang, the President of KSET at that time.

Professor Reigeluth’s keynote address used the following table to explain that the roles demanded of ID were changing as a result of the recent changes in the period surrounding ID. That is to say, as we transition from the old paradigm of an industrial society to the new paradigm of an information society, flexible, diverse learning environments in which the learner takes more initiative are required. He contested that as a result of this, ID must also respond to such demands.

Figure 1 Major Differences between the Organization of Industrial and Information Societies (by Reigeluth)

Organization of an industrial society	Organization of an information society
Standardization	Customization
Bureaucratic organization	Organization based around teams
Centralized authoritarian control	Autonomy backed by responsibility
Adversarial relations	Cooperative relations
Autocratic decision making	Shared decision making
Obedience (compliance)	Initiative
Uniformity	Diversity
One-way communication	Creation of networks
Compartmentalization	Holistic
Parts-oriented	Process-oriented
Planned obsolescence	Total quality
CEO or boss is “king”	Customer is “king”

Note: Translated by Suzuki from materials taken from Reigeluth, 1999, p.17 and used in his address.

In response to this, Professor Linda Harasim from Simon Fraser University mounted an objection in another keynote address that was reserved for the following day. Professor Harasim appears to be famous in the world of e-Learning for her achievements in system development incorporating cooperative learning grounded in constructivist psychology (she was unknown to the author at that time). She stated that, “The paradigm change is just as Professor Reigeluth claimed, but I believe that ID is part of the old paradigm. In the future, learning design, rather than instructional (teaching) design, will be essential.” This certainly seems like something that a constructivist would say.

This serves to encapsulate Professor Reigeluth’s comments. “Instruction is not teaching. It refers to design for the sake of furnishing optimal conditions for learners to learn what they are required to learn. Even as paradigms change, the importance of ID will remain constant in this sense. However, ID must advance in a more flexible manner, in which it can respond to changes. We are searching for such a path.” This is exactly right, I thought.

e-Learning is neither e-Training nor e-Instruction. It is study that one undertakes on one’s own. The name represents a mentality of providing an environment supportive of such study. Yes, in deed, it is e-Learning, not e-Training or e-Instruction. The instructor should not lead the learning, but should remain as “guide on the side.” The assertion that is often heard would state that: the “learning” emphasized through e-Learning is premised upon shedding the conventional method of teaching and fostering an attitude of independent learning. Yes, but, this is in no way meant to imply that “let-alone learner” policy with no help is a good thing. If there is no teaching act, because it is e-Learning, not e-Instruction, then all you can do is let things take their natural course. Everything would be left to the learners, nothing left on instructor’s part. Another claim that is frequently heard is: The general rule is one of personal responsibility. The fact that you can study at anytime and anyplace is one of the advantages of e-Learning, and so the learner is asked to make time for studying on their own. However, if one could get by on this, then there would be no trouble trying to make it happens. If you do nothing, nothing would take place. As instructor or instructional designer, it is your responsibility to make the learning actually takes place.

ID is a method of designing (planning) what type of teaching techniques are the most effective, efficient, and appealing to the learner and the subject that is to be learned, as well as the learning environment that has been provided. Because of the implications from the word instruction, it is possible that it unavoidably raises associations of telling according to the convenience of the side doing the teaching. But ID is not (just) how-to of telling. This is because although telling is the most effective manner in some cases, it is not always the case. Although circumstances in which telling is the most appealing option can be found in some cases, it is not always the case. If telling is the most effective and appealing option, it is good to tell. However, if it is not, then you have to design something else to make your instruction more effective and appealing.

To take it further, ID is effective at bringing about improvements in situations where teaching has not been adequately carried out. Overemphasis on knowledge has been claimed to be a problem. Yet conversely if information cramming and the rote memorization of data, which in no way come to constitute knowledge, are taken to be widespread, then ID should be applied so as to at least bring educational practices up to the minimum level of what could be termed overemphasizing knowledge. Lecturing is viewed as being problematic, and at the same time the truth is that even lecturing is not succeeding. It should be coolly pointed out to self-satisfied instructors who merely “trying to teach” that in reality their teaching is not bringing any learning on the part of the students. It may well be the case that ineffective teaching is in fact the benefit of the students, when the need for the content that is being taught was not well analyzed so the lecture is full of unnecessary information! I feel that it is another one of ID’s missions that we find the true value of lecturing and knowledge comprehension, which is totally different from mere memorization of unnecessary information and data without understanding what they are enforcing the students to memorize.

When direct teaching is meant to be provided, proposals should be made as to how directions can best be given to the students (in fact when this cannot be done, then you cannot teach independent learning methods to your students to use for themselves). When direct teaching is not meant to be provided, methods should be offered that allow people to learn without being directed (so-called coaching and mentoring should be present for these occasions). If your objective is to expand the students’ knowledge and skills, then suitable ways of doing so should be designed. If your objective also includes internalizing an “attitude of independent learning” in your students, then methods which would allow them to achieve this simultaneously should be sought out. If the order is given to you to create a culture in the form of a learning organization within a company, then structures suited to this end should be proposed. What ID is attempting to bring about is the setting in place of internal and external conditions for the attainment of learning objectives, including the methods for direct teaching and indirect teaching by the design of learning environments. This thought occurred to me again as I listened to the back and forth exchange between these two professors.

[Works Cited]

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- Reigeluth, C.M. (Ed.) (1987) *Instructional Theories in Action: Lessons Illustrating Selected Theories and Models*. Lawrence Erlbaum Associates, Hillsdale, N.J.
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Episode 3:

“Balanced score cards and ID are the two pillars of our company’s human resource development.” @ SIGEDU Case Studies Session 2003

Over the last several years I have looked forward to occasions to discuss ID with members of the Software Engineers Association (SEA)’s Special Interest Group on Education (SIGEDU). I have often been unable to take part in their monthly meetings held at the SEA conference room in Tokyo, because they are in conflict with my monthly faculty meeting. But no matter what the cost, I make an effort to hasten to events such as the study tour held each year in April (in year 2003 it was to McDonald’s Japan’s Hamburger University), the overnight education workshop held in the fall, and the case study session held in June.

As there are only a few colleagues in Japan with whom I can discuss ID, I enjoy listening to one another’s tales of difficulties from people in SIGEDU that practice ID at a variety of different work settings and from a wide range of other people. It is interesting that people who are not involved in the fostering of software engineers are intermixed into the SEA-SIGEDU for some reason. Moreover, they are not necessarily exclusively filled with people who are proactive with regard to e-Learning. I’m not sure whether this is because these are gatherings of “traditional instructional designers” or not, but, it is fascinating to be the case for software engineer training. Some of the members even claim that “I’m not interested in e-Learning.”

After returning to Japan, I worked for a liberal arts college at a private university in Sendai City. While it was a position that I could teach educational technology, the majority of my students worked in non-educational positions at general companies, after they graduated. Out of a desire wishing to be involved in training more specialized professionals, I transferred myself to Faculty of Software and Information Sciences, at a public university in Iwate, where I was engaged in the fostering of software engineers who are capable of information system development and the fundamentals of ID. I was trying to expand the notion of ID within K-12 schools at my first assignment in Sendai, because I had been involved in pre-service teacher certification program. However, since software engineer training and human resource development (HRD) in private companies had become the main focus in my second post in Iwate, I had to begin studying how ID was utilized in such areas by being participated in SIGEDU. As such, I set my sights on efforts to discover how the adverse effects from a school-type education could be overcome.

In terms of my image at the time of corporate training, I firmly believed that this was distinct from schools in the sense that ID concepts had seeped in and that they conducted efficient training based on ID. However, even in such corporate settings, lecturing to mass classes by an instructor was the most frequently adopted method of training. This may have been because school education in Japan is so effective that it should be imitated in the corporate trainings, or else this is all they know as the method of training. I was amazed that the objectives for training were not clearly specified, and matters like the effectiveness of training and return on investment (ROI) for such training were rarely spoken for.

It has been claimed that until only recently, the common perception for corporate training in Japan was that training was part of welfare programs and served as an opportunity for relaxation and a change of pace from busy days of conducting business. HRD divisions has been viewed as costs rather than investments in order to foster the human resources that will take charge of the company in the future, and as such are cut when business conditions deteriorate. Likewise, the receiving side lacks the awareness that such training is a personal

investment. Thus they tend to consider their training as something they “have to do,” and long accustomed rote memorization and passive acceptance of such training was general attitude when they are in the training. The only merit for participants is to be able to spend several easygoing days away from their place of work. This was quite surprising to me. It seemed as if in the end, school education has served only to foster the perception that studying is not useful and should be skipped if at all possible.

While being buffeted by such countervailing winds, many members of SIGEDU were challenging to a number of difficult problems: For the recipients of the training, how do you foster “proactive learners who will make the most out of each chance they are given,” leaping out of the attitude of “passive customers who are just demanding?” How do you shift attention of the manager of the training to the results of instruction, rather than to how complete the facilities are utilized? How do you aim to individually tailor instruction so that it matches the needs of the recipients? How do you explain to senior management that instruction is an investment for the realization of the company’s vision? How can I break the spell of school education in my trainees and to teach that merely expecting detailed explanations from instructor and trying to memorize them is no way to make their training successful? Through such efforts, it has been their personal experiences that the concept of ID is valuable and can somehow be of service to their challenge to make differences in their professional capacities. To me, such a group of professionals could not be anything but of the highest appeal to be friends with.

If corporate training is examined through the concept of designing instruction holistically in an ID sense, then an optimal combination of e-Learning and other types of training methods can be designed. On the other hand, if e-Learning is designed without any doubts in the style of school education through mass instruction, then it will be carried out by posting lectures to the Internet exactly as they were in the face-to-face classrooms. As such, it is not hard to imagine that no particular differences would be apparent compared to the existing methodology, and all that would be discussed would be the cost accounting in the form of how much was used to create it. Similar challenge exists among universities adopting e-Learning, in that there have to be ideas aside from just recording lectures as they are and posting them to the Internet. It would be best to avoid passing down the problems from before the advent of e-Learning exactly as they are.

The 2003 SIGEDU cases study sessions were conducted at a training center of Ricoh Techno System. Unfortunately, I was unable to attend because the event overlapped with a presentation I was to give at an international conference. Its selling point is its thorough manner adopted in their sessions, whereby out of the 90 minutes available to provide each case study, the report is limited to 30 minutes or less (on top of which there are interruptions during the 30 minute presentation) with the remaining 60 minutes devoted to discussions. The event brings to light solutions for things other than e-Learning material development by understanding ID. ID can also be used to create HRD division capable of offering solutions beyond training. One case reported that “The balanced score cards (BSC) and ID are the two pillars of our company’s HRD.” Despite the small number of participants, this debate was undoubtedly hotly contested. Almost all of my information about status-quo of corporate training and HRD has been acquired from SIGEDU’s case study sessions. In this textbook, I will occasionally introduce case examples from what I have learned from them to promote discussions.

Thank you for accompanying me on this long “Preface.” Please enjoy the main text. (End)