# Case Study: The Ricardo Martinez Case

**Rob Power (robpower@hotmail.com)**
**Education 6910: Perspectives in Web Course Management for Education and Training**
**Assignment #1: Case Study**
**Submitted: June 1, 2003**

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## Introduction:

The Ricardo Martinez Case Study (Mann, 2003) presents an example of the frustrations encountered by a University professor and students who are participating in an online section of a Human Resources Development course traditionally offered on campus. Martinez is an instructional designer and web developer who was asked by a mutual friend to assist Georgina Bates, a first-time online instructor with traditional classroom experience, in identifying the sources of her frustrations, and those of her students (*Ibid.*). Martinez was also asked to assist Bates in identifying possible solutions to those frustrations, and means of more effectively managing her online course (*Ibid.*).

The Martinez Case is an excellent Case Study for understanding the issues involved in offering and moderating online courses. An examination of this case offers insights into the types of frustrations that can be experienced by both instructors and students. It also offers insights into the educational theory and instructional development issues associated with online

education.  This can be achieved by analyzing the Martinez Case Study in the context of the specific frustrations experienced by Bates and her students, and the context of key issues and concepts in the design and management of web sites for online education.  By identifying these frustrations and developing a map of the online course web site structure as it currently stands (*Concept Mapping*, *n.d.*; Trochim, 2002; White, 2002), it is possible to develop a map or model of a more functional web site from the perspective of the end-users, the students (Dickelman, *n.d.*; Johnson, 2000; Landsberger, 2002; Lynch and Horton, 2002; Nielson, 1999).  It is also possible to make recommendations to the professor as to how she should view and manage the online section of her course itself, the learning theories and practices most appropriately suited to online educational environments, the format of her online course's content, and the types of activities best suited to student achievement in an online environment (Dalgarno, 2002; Derry, 1988; Duffy and Cunningham, 1996; Mann, *n.d.*, 2000).

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## An Analysis of the Causes of Student and Instructor Frustration:

The major frustrations experienced by Professor Georgina Bates are the failure of her students to submit their assignments by designated due dates, or in the proper format, the lack of student participation in required online discussion forums, and a sense that her students are lost and having difficulty following the course structure and materials (Mann, 2003).  Bates has also received feedback indicating that her students are frustrated, lost, struggling with the course, and not enjoying the course as much as students who have participated in previous on campus sections (*Ibid.*).  Students participating in Bates' online course have also experienced a number of frustrations.  These are primarily centered around an inability to find information on required assignments and their due dates, as well as their instructors expectations in terms of their

assignments and their online participation (*Ibid.*). In addition, students seem to be having difficulty locating necessary resources on the course web site, such as the discussion forum, required readings, and slides associated with weekly readings and assignments (*Ibid.*). The students seem frustrated by what could best be categorized as a lack of a sense of direction in their online course participation (Dickelman, *n.d.*; Johnson, 2000; Landsberger, 2002; Lynch and Horton, 2002; Nielson, 1999).

The sources of the professor's and the student's frustrations can be found in two major areas—design and navigation of the course web site itself (*Ibid.*), and Bates' inexperience with the design and management of effective online instruction (Dalgarno, 2002; Derry, 1988; Duffy and Cunningham, 1996; Mann, *n.d.*, 2000). In terms of web site design and navigation issues, Bates' course web site is poorly designed from the perspective of the end-users—her students (Dickelman, *n.d.*; Johnson, 2000; Landsberger, 2002; Lynch and Horton, 2002; Nielson, 1999). Although all of the necessary resources have been incorporated into the site, the site's layout makes it difficult for students to locate required resources and information as needed (*Ibid.*). Some of the essential resources, such as the link to the online discussion forum, are located in inconvenient places on the site, and students are not given access to all required resources from one location for each unit, or week of study, for the course (*Ibid.*; Mann, 2003). A representation of the layout of Bates' course (*Concept Mapping*, *n.d.*; Trochim, 2002; White, 2002) is depicted in the following section: *A Flowchart Representation of the Current Course Site*.

Bates' inexperience with the design and management of effective online instruction also provides a source of frustrations for both students, and the professor herself (Dalgarno, 2002; Derry, 1988; Duffy and Cunningham, 1996; Mann, *n.d.*, 2000). These frustrations can be examined in the context of Phase Theory (Mann, 2000), as well as within a framework such as

*D.E.C.L.*—the *D*elivery, *E*nvironment, *C*ontent, and the *L*earner(s) involved in an educational context (Mann, *n.d.*).

Phase Theory attempts to describe online instruction in the context of a practical categorization of the phases, or stages, that online course developers or instructors progress through as they gain knowledge and experience with online instruction (Mann, 2000). Essentially, it presents a theory as to when, how, and why course developers and instructors incorporate technology and types of content and student activities into their instruction (*Ibid.*). In this instance, Bates seems to display characteristics primarily associated with the first phase of Phase Theory. Her efforts seem focused on a simple transfer to an online format of the content and activities she has incorporated into her traditional, classroom based sections of the course (*Ibid.*, 7-13). Bates seems to have given little thought as to the practicalities of online learning situations, or to the learning theories and pedagogical practices that lend themselves most effectively to student achievement in online learning environments (Dalgarno, 2002; Derry, 1988; Duffy and Cunningham, 1996; Mann, *n.d.*, 2000). However, Bates does display some characteristics of the second phase of Phase Theory (Mann, 2000, 13-17). She has incorporated a discussion forum into her online course, in an effort to encourage constructive student interaction with the course content, and with their peers (*Ibid.*). The incorporation of such asynchronous communications tools as discussion forums has the potential to take advantage of constructivist learning theory, if student participation could be more effectively facilitated (Dalgarno, 2002; Derry, 1988; Duffy and Cunningham, 1996; Mann, *n.d.*, 2000).

In terms of *D.E.C.L.* (Mann, *n.d.*), Bates' perspective on *D*elivery has shifted to online delivery, although her methods do still show some hints of more traditional classroom delivery pedagogy (*Ibid.*). She could also use some background training or experience in online

educational theory and pedagogy (Dalgarno, 2002; Derry, 1988; Duffy and Cunningham, 1996; Mann, *n.d.*, 2000).

In terms of *E*nvironment (Mann, *n.d.*), again Bates has shifted her course to an online environment. However, it is not the friendliest of environments, and it is far from useful or effective (Dalgarno, 2002; Derry, 1988; Duffy and Cunningham, 1996; Mann, *n.d.*, 2000). In this instance, the mode of delivery is not the greatest hindrance to student success in this course. It seems to be the environment that is the greatest impediment to success (Mann, 2003). With some environmental refinements, student interaction with the course could become more transparent, students could become more comfortable with the online delivery mode, and everyone involved could see more success (Dalgarno, 2002; Derry, 1988; Duffy and Cunningham, 1996; Mann, *n.d.*, 2000).

The *C*ontent (Mann, *n.d.*) is another important element in this Case Study. Bates' content seems stuck in line with more traditional classroom lecture course content (Mann, 2000). She has placed readings online, along with required assignments, but there is no indication of the kinds of real collaborative or constructive content that have the potential to flourish with the introduction of technology-based tools (Dalgarno, 2002; Derry, 1988; Duffy and Cunningham, 1996; Mann, *n.d.*, 2000).

Finally, there is the *L*earner (Mann, *n.d.*). Bates is new to online education, and so are her students (Mann, 2003). This does not seem to have been taken into account (Mann, *n.d.*). As both Bates and her students are immersed in a learning situation, it would have been desirable from the onset for support to be provided by the professors' more experienced peers so that she could learn, at the very least, some of the more practical elements of moderating a web course (Dalgarno, 2002; Derry, 1988; Duffy and Cunningham, 1996; Mann, *n.d.*, 2000). If that had

been possible, then perhaps Georgina, and her 'mentor,' would have recognized the potential for student difficulties from the design of her online course web site—and would have designed a much friendlier course interface that would have eased the transition of her students from lecture-based to online learning (*Ibid.*).

## A Flowchart Representation of the Current Course Site:
### (*Concept Mapping*, *n.d.*; Trochim, 2002; White, 2002)
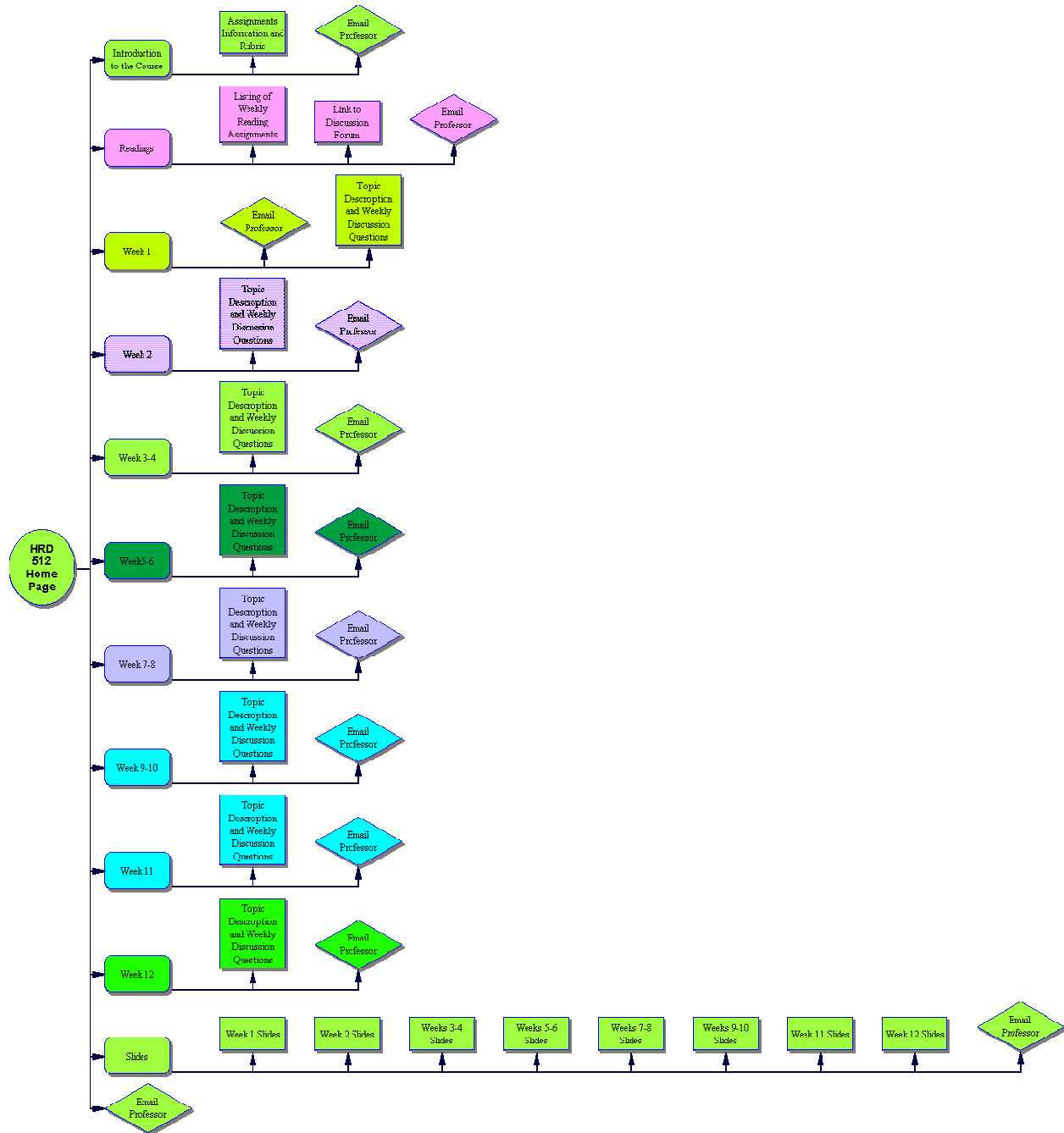
# A Flowchart Representation of Recommendations for Site Improvement:
### (*Concept Mapping*, *n.d.*; Trochim, 2002; White, 2002)
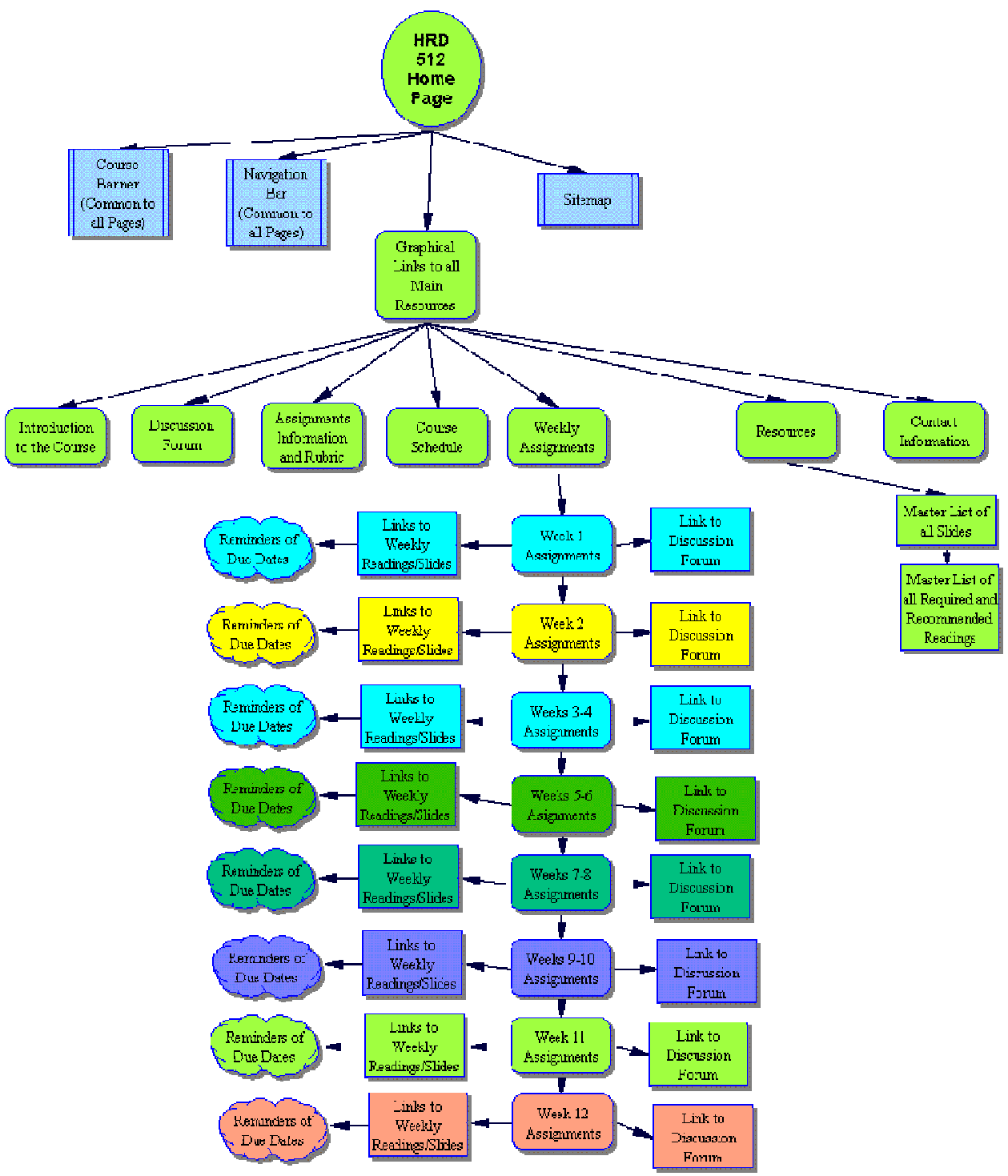
## An Overview of Recommendations for Improvement of the Course Site:

A number of recommendations could be made to help Professor Bates improve her online course, and relieve the frustrations experienced by she and her students. These recommendations can be grouped into two broad categories—those of practicality (Dickelman, *n.d.*; Johnson, 2000; Landsberger, 2002; Lynch and Horton, 2002; Nielson, 1999), relating to the site design itself, and navigational issues, and those relating to theoretical framework, pedagogy, and the content of the course web site (Dalgarno, 2002; Derry, 1988; Duffy and Cunningham, 1996; Mann, *n.d.*, 2000).

A number of recommendations could be made with regards to the design and layout of Bates' web site, and navigation of the web site (Dickelman, *n.d.*; Johnson, 2000; Landsberger, 2002; Lynch and Horton, 2002; Nielson, 1999). One means of addressing these concerns is represented (*Concept Mapping*, *n.d.*; Trochim, 2002; White, 2002) in the form of a map, or model, in the preceding section: *A Flowchart Representation of Recommendations for Site Improvement*. This recommended layout for the course web site begins with a more distinctive course home page that would welcome students to the site, and act as a porthole for student activities on the site throughout the duration of the course (Dickelman, *n.d.*; Johnson, 2000; Landsberger, 2002; Lynch and Horton, 2002; Nielson, 1999). The course home page would include graphical icons providing links to all of the necessary tools and resources students would need to access throughout the course (*Ibid.*). A field could also be provided allowing the instructor to post timely messages or reminders to students, which users of the site would not miss due to the home page's nature as a porthole to the rest of the site (*Ibid.*). The page would also include a distinctive top banner, which would be common to all pages throughout the site,

and which would clearly identify all pages as part of a common site (i.e.: HRD 512: Organizational Psychology) (*Ibid.*). The home page would also contain a navigational sidebar that would, again, be common to all pages throughout the site (*Ibid.*). This sidebar would also contain links, in textual hyperlink or button format, to all of the major components, resources and tools located throughout the course web site (*Ibid.*). In addition, a link would be provided in graphical icon format on the course home page, and on the navigational sidebar, to a sitemap that would allow students to easily access a powerful navigational aid (*Ibid.*).

The graphical-format links on the home page would serve as a representation of the organizational structure of the web site itself (*Ibid.*). The site's content would be organized into such categories as a Course Introduction, the Discussion Forum, a complete listing of Assignments and Evaluation Rubrics, a Course Schedule, Weekly Assignments and Activities, a complete listing of course Resources, and Contact Information for the instructor. By clicking on the link for the Weekly Assignments, it would be as easy for students to locate and access their readings, activities, and assignments for Week 1 of the course as it would be for any other week (*Ibid.*). Links would be provided on each Weekly Assignments page to every resource that a student would need for that week, including all required and recommended readings, all activities and discussion questions, the Discussion Forum, assignments and their due dates, and any other tools and resources needed for that particular week (*Ibid.*). Providing students with access to all needed components, resources and content from one place each week would reduce student confusion, alleviate their frustrations with the online course format, and allow students to concentrate on the course content itself, rather than on remembering and locating everything needed for that week (*Ibid.*). This would also help to alleviate some of Professor Bates' frustrations, as she would notice a reduction in student frustration, and increase in student

satisfaction level with the course itself, and increases in student online participation and the timely and correctly formatted submission of required assignments (*Ibid.*).

With regards to issues of theory, pedagogy, and course content, there are a number of recommendations that Professor Bates could take under consideration (Dalgarno, 2002; Derry, 1988; Duffy and Cunningham, 1996; Mann, *n.d.*, 2000).  However, to implement these recommendations, Bates would likely need exposure to literature related to online instructional issues, access the wisdom of her more online-experienced peers, and time to gain experience with online course design and management on her own (*Ibid.*).  First, Bates should take into consideration theoretical considerations related to online instruction (*Ibid.*).  These include the examples of learning theory that may better lend themselves to online instructional contexts, such as constructivist learning theory (Dalgarno, 2002; Derry, 1988; Duffy and Cunningham, 1996).  They also include such theoretical frameworks as Phase Theory (Mann, 2000), which could serve to provide Bates with valuable insight into her own perspectives and practices, as well as into possible directions to take in efforts to improve her online instructional skills and practices.  Second, Bates could take the time to examine her efforts through a framework such as *D.E.C.L.* (Mann, *n.d.*), which would allow her add focus to her efforts to develop and manage online courses.  Applying the *D.E.C.L.* framework would be a useful strategy when examining and refining her theoretical and pedagogical perspectives, as it would help Bates to maintain her focus on the critical components of any online educational situation (*Ibid.*).

By examining her theoretical and pedagogical perspectives, and applying them to a framework such as *D.E.C.L.*, Bates would be able to identify the positive aspects and shortcomings of her current practices (Dalgarno, 2002; Derry, 1988; Duffy and Cunningham, 1996; Mann, *n.d.*, 2000).  This would allow her to refine her efforts, and move beyond her

current practice of transferring a traditional classroom course and its content into an online environment, into more sophisticated and effective phases of online instruction (Mann, 2000). Bates would gain the perspective, wisdom, and experience needed to transform her online course into an experience that actively engages her students in constructive and collaborative learning, and that allows herself, and her students, to utilize the power of the online tools at their disposal to their full potential (Dalgarno, 2002; Derry, 1988; Duffy and Cunningham, 1996; Mann, *n.d.*, 2000).

## Some Counseling Advice for Ricardo Martinez:

As Ricardo Martinez is an instructional designer and web developer with a higher educational institution (Mann, 2003), he is no doubt aware of the issues and concerns involved in online education that have been identified as having appeared in Professor Bates' course. He would likely be able to quickly identify the sources of frustration for Bates and her students, and to recommend ways improve both the functionality and transparency of the course web site itself, and the effectiveness of the course content. This in mind, and considering Bates' particular predicament and the timeframe of her consultation with Martinez, there is some advice that would be most practical to provide to Bates at this point.

Given Bates' timeframe, and the fact that a good portion of the course has already transpired, it would be most practical to counsel her, at this point, on how to improve her site design to increase its functionality for the remainder of the course (Dickelman, *n.d.*; Johnson, 2000; Landsberger, 2002; Lynch and Horton, 2002; Nielson, 1999). Martinez would be wise to recommend that she redesign the course home page so that it would act like a more effective

porthole for students (*Ibid.*).  Second, it would be pointless at this point in time for Bates to redesign the specific Weekly Assignments pages for those weeks that have already transpired. Martinez should recommend that she add links on the remaining Weekly Assignments pages to all of the resources that students will need for those particular weeks, so that they would not have to search through the rest of the site to find those resources (*Ibid.*).  He should also recommend that she post reminders on each Weekly Assignments page of what assignment due dates are upcoming, and provide links to the instructions and expectations for those assignments (*Ibid.*). Finally, Martinez should recommend that Bates add a direct link to the Discussion Forum on each of the remaining Weekly Assignments pages (*Ibid.*).  If making such updates proves to be too time-consuming or cumbersome for Bates at this point, Martinez should advise her to create a navigational sidebar for her site (*Ibid.*), using the "Shared Borders" feature in Microsoft™ FrontPage™ , which Bates used to create the original course site in the first place (Mann, 2003). This feature could be used to instantly add all of the necessary links to every page in her site, and Bates could then simply re-upload the site to her local server.

In a more general context, Martinez would be wise to counsel Bates to reflect upon her goals for her online course, as well as on the successful and unsuccessful elements of this particular section (Dalgarno, 2002; Derry, 1988; Duffy and Cunningham, 1996; Mann, *n.d.*, 2000).  He could offer her some suggestions on the types of content that work best in online formats, as opposed to classroom formats, and suggest that she consider ways to make better use of the tools at her disposal—through the types of activities in which she engages her students— in future sections of the course (*Ibid.*).  Martinez could ground this counseling by directing Bates to research and literature in the area of online education, such as Phase Theory (Mann, 2000) and

the *D.E.C.L.* framework (Mann, *n.d.*), which he could advise her to use as tools to guide her reflective efforts, and her efforts to redefine her goals for future sections of her online courses.

## Conclusion:

The Martinez Case Study provides an example of the kinds of issues and problems that are likely to face many educators as they venture into online educational formats for the first time (Dalgarno, 2002; Derry, 1988; Duffy and Cunningham, 1996; Mann, *n.d.*, 2000, 2003). Bates is obviously an experienced teacher with expertise in her subject area (Mann, 2003), which puts her good standing to succeed with her efforts at online instruction (Dalgarno, 2002; Derry, 1988; Duffy and Cunningham, 1996; Mann, *n.d.*, 2000). She is also willing to try online instruction, and is open and receptive to the advice of those with more experience in the delivery of online education (*Ibid.*). She will no doubt meet with success in her future online educational efforts. With the assistance of an experienced instructional designer and web developer, she will likely uncover the strong points and mistakes of her current effort, and implement strategies to make the remainder of her current course a more positive experience for both she and her students (*Ibid.*). What Bates is lacking is knowledge and experience in the areas of the practicalities of online instructional delivery, and the pedagogical practices that have greater potential to take full advantage of the powerful tools available in online environments (*Ibid.*). As Phase Theory (Mann, 2000) makes apparent, this knowledge and experience will be gained by Bates as she progresses through her online instructional efforts, discovers what works and what does not, and develops new and more effective ways to engage her students and take advantage of online educational tools.

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