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"Two Approaches to Choosing a Course Management System: One That Worked and Another That Didn't"

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Abstract: In 1998 Excelsior College made a choice of course management system, Lotus LearningSpace, which proved unsatisfactory. The lessons learned from that experience enabled us to better define our needs and improve the selection process and, in 2002, make a better choice for its replacement, WebCT Campus Edition 4.0. Our advice: define your needs, involve as many stakeholders as possible, try out all programs being considered, and realize that any decision involves tradeoffs.

Excelsior College, previously Regents College, is a private, non-profit college, founded in 1971 and regionally accredited by Middle States. Current enrollment is 22,500 students – larger than Drexel or Stony Brook. We call ourselves "America's First Virtual University," and were to some extent a model for the later Empire State College and Western Governors University. The administrative offices of Excelsior College are located in Albany, New York.

Among its many unusual features, there are two facts about Excelsior that are relevant to my talk. The first is that not only do we serve – exclusively – students at a distance,

our faculty are also at a distance. Most are in the northeast, but many are scattered all over the country. They teach for us online, and assemble as a body infrequently. While this complicates the logistics, it allows us to employ the best faculty wherever they may be located, and without need for them to relocate.

The second fact is that Excelsior is the only regionally accredited college in the country with no undergraduate courses. More precisely, since there are a small number of graduate-school-only institutions: of colleges with undergraduate degree programs, we are the only one with no courses. You may wonder how there can be a college with no undergraduate classes. That would be the subject of a different talk (refer to our Web site). In fact it works quite well, which is why we are growing, struggling to keep up with enrollment and our budget currently has a healthy surplus. We do have degree programs, and requirements, and we do have faculty.

Excelsior does offer instruction at the graduate level. This instruction is 100% online – we do not even have any classrooms.

When we started offering online graduate courses in 1998, the college had no previous experience offering instruction of any sort. (In fact, the College was not even completely comfortable with the concept.) So the selection and implementation of a course platform coincided with the creation of our first courses, and with all the decisions that offering courses for the first time required.

We chose Lotus LearningSpace, at that time in Version 3. The way we selected LearningSpace is a textbook case of the wrong way to go about it. The short version of the decision is that the choice was made by the head of our computer department. More accurately, the academics in the College were not in a position to select and make the case for any alternative platform.

Part of our problem was that we made the choice quickly. There were reasons for this: we were waiting for regulatory approval, and when we received it we wanted to launch without further delay our long-awaited M.A. program. Still, we did not use well the few months that we had.

In retrospect, we did not know what our needs were. There was no process of trying to analyze them. Remember that the College had never offered any courses. Once the courses had been launched we made substantial changes to them, in assignments, means

2

of assessment, and degree of faculty involvement. We added student papers, which were not a component of the original courses. As a result of student requests we added synchronous chat, which is now a key component of many of our graduate courses.

There was no systematic examination of a variety of course platforms. There were no presentations by vendors, no demonstrations, no training until after the decision was made. LearningSpace was set up on a workstation for examination, but that was it.

As a result, while the decision was formally made by the Academic Vice President, she followed the recommendation from the technical staff. They recommended choosing Lotus LearningSpace because we already made extensive use of other Lotus products: Notes (for email) and Domino (server platform). Therefore the installation and support costs were expected to be less. Also Lotus was a known "name" and a well-established company, whereas other alternatives came from small start-ups.

This selection turned out to have been a poor one; some would call it disastrous. Faculty hated it, and some gave up on it. In LearningSpace 3, course designers had to download a separate client. Faculty who were designers had to log in to our network from a distance, a complex procedure that they had never had to do before. The College had never been asked to support this type of faculty access, and was arguably unprepared for it. For example, at the time Excelsior provided no telephone technical support.

Another serious issue for faculty was that LearningSpace did not support the Macintosh operating system. While the College is almost exclusively a Windows environment, some faculty at other locations – we learned after launching LearningSpace – had Macs, liked them very much, and were not at all happy about having to move to another platform to teach for us.

Then there were usability issues. The interfaces seen by students and designers were different. To see the effect of a change, a designer had to log out, log back in as a student, see the result, log back out and log back in as designer. No changes could be made in a course without taking it offline, making it unavailable to students.

While LearningSpace had a calendar and a gradebook, the only items which could be included on them were activities carried on through the program. There was no provision for student papers or any other than short-answer exams. Since papers and essay exams could not be entered on the calendar, students received constant misinformation from it:

that nothing was due or scheduled. We were required to enter a time estimate for every activity, but the estimates could only be in hours, not days, so we didn't use them either.

We found we were in a small niche product, without many peers to exchange experiences and advice with. We could neither buy nor sell our courses. There were no sample courses or orientation courses, unless we wrote them. There were no user groups. The Lotus Corporation provided very poor end user support; there was nothing like the extensive Web site that WebCT has.

LearningSpace had no course-wide search, no "resume" feature. It did have features we didn't need, such as the ability to launch a program as a course activity. It seems to have been created with software instruction in mind – not surprising for a product created by a software company.

By the time three months had gone by it was clear that we had serious problems with LearningSpace. My unit, the Master of Arts program, realized that given our course structure at the time, we did not need a course management system at all; we needed a bulletin board and chat system. We therefore moved our courses to WebBoard, and remained with it for two years.

The other unit at Excelsior offering courses, the School of Nursing, had a different issue, but a very serious one. When LearningSpace 4 was launched, it addressed some of the difficulties the M.A. program had with it, and we returned to using it and stayed with it through version 5, when the College as a whole discontinued LearningSpace. However, the program was rewritten from scratch with version 4, which had a completely new interface. Features of LS 3 that the School of Nursing needed, such as student team projects, were missing from the revised program. The final factor, for the School of Nursing, was a grant with an external partner that involved persons with disabilities. LearningSpace was not fully accessible to the disabled, nor did Lotus, when contacted, show much interest in correcting the shortcomings. This was the turning point for Nursing.

The technical staff also had been disappointed in LearningSpace. While it was, as predicted, easy for our staff to set up, maintenance was very cumbersome.

The decision to change course platform was made in late 2001 and early 2002. By this time we had learned a lot about what our courses were or should be, what online

activities we wanted to include, and what a course platform could and could not do. It was above all the improved understanding of what our needs were that allowed us to make a better decision.

In 2002 we were not in as much of a hurry. There was no crisis and we could examine alternatives fully. We – faculty and staff – started by making a joint list of the features that we wanted (Appendix A [sorry, not available for this online posting]).

It is interesting to note how many of these features are in fact not provided by any platform. For example, since we were making extensive use of student papers in the M.A. program, it was not uncommon to have incompatibility of files between student word processor and professor word processor. Yours truly was the resource to solve these. Since conversion is a function for software to perform, why could this ability not be built right into the course platform? For that matter, why couldn't a word processor and a citation (reference) manager just be built in? Why require the student to go to an external program? This may seem an extreme suggestion, but remember that a spelling checker was once an external program purchased from a different company than the word processor whose files it checked.

Another feature we came up with, that no program implements, is email notification of the student. Some programs, like WebCT, will remind the student of upcoming deadlines when the student logs in to the program. However, if the program could originate an email message to the student, or at least offer the option of doing so, this would help the course run more smoothly. Similarly, why couldn't the program send out an email advising of the final grade?

Leaving these pipe dreams, we had to prioritize the features we wanted. Some of them, like accommodating student papers and providing access for the disabled, were "show-stoppers" – features our software must have. Others, like a student gradebook or an email module, would be nice but were not vital.

We made the attempt to research comparisons of course platforms through literature searches in databases that dealt with academic technology – something we hadn't tried in 1998. This approach was not particularly fruitful. These programs are large and complex, and need to be installed on a server. They do so many different things – live sessions, exams, email, discussion boards, calendar, and so on – that there is a lot to evaluate. At

the same time, just like other software, they evolve frequently into new versions. Those articles our librarian could find on the topic did not address the precise versions of the programs that we were comparing. We didn't feel that a consultant would have the expertise to help us in this decision.

We had to research the problem ourselves. So we invited vendors to do demonstrations for us, and looked at sample courses which the vendors either had already set up, or set up for us. We also had some of our students try them out as well. Anyone at Excelsior with interest in the process was welcome to participate. The result of our prioritization and experimentation can be seen in Appendix B.

In mid-2002 the College made the decision to switch to WebCT Campus edition. The decision was by consensus, and there was no one dissatisfied with the decision. The software went "up" for development purposes in September of 2002, and in January 2003 we launched the first courses in it.

The results of this improved process have been remarkable. Everyone is happy. The faculty are delighted. The technical people have many fewer support calls to deal with, the program is more stable than LearningSpace ever was, and its Sun server is less vulnerable to hackers than the Windows NT server that hosted LearningSpace. The Macintosh users are accommodated. The course is so intuitive that we no longer have, in the M.A. program, an orientation course to introduce students to the software. People have a sense of having been heard and having been involved, and all understand that any decision such as this involves tradeoffs and compromises.

In fact there are some features of LearningSpace that we miss, now that we no longer have it. We miss being able to send email to an external address from within courses, and its easier file handling, allowing direct links to course files, and its private or group chat rooms, open to a selected subset of students only. We miss, from WebBoard, the ability to subscribe to discussion board postings, receiving new postings and responding to them via email.

However, we found that we had an unexpected bonus from WebCT: it solved our problem of archiving course documents. The question of how to archive all materials on which a grade had been based – not just exams, but papers, and interchanges between the student and faculty member, anything that might come up in a grade appeal or lawsuit –

had been one that perplexed us and which we had been studying, laconically, for over a year. However, WebCT retains all of these materials – assignments sent to the faculty member, files (papers) returned to the student with annotations, and all emails. Our problem was solved, just by adopting WebCT.