

Needs Analysis Report

Communication in the SoE IST Distance Program at IU

Consulting Team

Brittany Barwegen

Cesur Dagli

Minkyoung Kim

Carlene Patterson

Olgun Sadik

Annisa Sari

EXECUTIVE SUMMARY

The purpose of the project was to define and identify the gaps of communication between stakeholders in the IST department (faculty, staff, and distance master's students). This report outlines the project methodology with heavy details in data collection and multiple analysis procedures including PEST, SWOT, and Force Field analysis methods. The results of the analysis are:

Positives:

- Program of Study Form Availability
- Email and distribution lists are main communication methods
- Easy access to advisor and staff
- Website is the main resource

Negatives:

- Poor website functionality
- No standard orientation process
- New roles and responsibilities are not defined for advisors
- Terminology of "outside electives" is unclear
- New office staff

Based on the findings of the analysis, the recommendations are:

- Modify the content and functionality of the website
- Standardize orientation materials and process
- Define an advisor's role and responsibilities
- Define outside electives
- Use the advising tools in OneStart's Student Center

ACKNOWLEDGEMENTS

We would like to thank the following people who made this project possible:

- Elizabeth Boling, Associated Dean for Graduate Studies
- Dr. Theodore Frick, IST Chair
- The IST faculty and staff – who enabled or participated in our data gathering
- Dr. Cho – for your guidance.

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1. INTRODUCTION

1.1 A needs analysis was conducted to determine if there were any gaps in the communication to and from distance master's students in the Instructional Systems Technology (IST) department at IU. There were some initial concerns by the Associate Dean for Graduate Studies, Elizabeth Boling, that initiated the analysis, the main one being centered on the informing of and discussion of a student's program of study.

2. AIM AND SCOPE

2.1 The aim of the analysis project was to identify the communication gaps and identify possible causes of those gaps. This project looked at factors solely dealing with the informing of and discussion of a student's program of study. These factors included, but were not limited to, communication tools, resources, and the advising process. Potential strengths, weaknesses, threats and opportunities were identified, and form the basis of our recommendations.

3. BACKGROUND

3.1 The current IST chair is Dr. Theodore Frick, who has been serving since July 1, 2010. Prior to Frick, the chair was Elizabeth Boling, who had served from 1999-2010.

3.2 During the transition from Boling to Frick, a change was made in how distance students (both master's and certificate) were advised. As chair, Boling advised all IST distance students – master's and certificate. After Boling changed positions to the School of Education (SoE) Associated Dean for Graduate Studies, a decision was made in the IST department for faculty to begin advising distance students. This new practice became effective the Fall 2010 semester with Boling maintaining the advisor-advisee relationships she had already formed, and IST faculty sharing the incoming group of distance students. According to our data, most faculty wanted to advise distance students because they thought it was either fair to share the load with the chair, and/or an appropriate and reasonable expectation of their role as a faculty member.

3.3 During our data collection, previous staff said that faculty had advised distance students "in the past." However, there was no date range on when this was. The structure, students said their advisors were slow to respond. What resulted was students would call the IST office to either attempt to find answers or to ask for help in getting a response from their advisor. The IST office eventually became the hub for communications with distance students. Boling began advising students academically, and two office staff members assisted with more technical advising.

3.4 During the Boling/Frick transition the IST office staff also changed. One of the former staff members retired. The other changed positions within the SoE, but still assists with the IST department. A new administrative secretary is now in the IST office.

4. PEST ANALYSIS

4.1 The PEST (Political, Economical, Social, and Technological) analysis provides a scan of the external macro-environment in which the IST department operates.

Political	Economical	Social	Technological
<ul style="list-style-type: none"> • FERPA Standards: Protects students, their records, and grades. Allows people to access students via directory information unless students provide other documentation denying it. • State Accreditations: Council for Higher Education reviews the quality of distance education institutions. 	<ul style="list-style-type: none"> • Tuition fees • Price of social and technological needs • Global economic crises 	<ul style="list-style-type: none"> • Student demographics: Distance students are older women who enroll in school part-time and maintain a job and/or families with young children. They have clear and focused reasons for taking distance courses. • Communication: 21st Century has changed forms of communication into faster and larger networks. 	<ul style="list-style-type: none"> • Internet: Students can access anywhere at any time and make online learning a new trend. • Website: Information distribute via the Internet for people to access. • Distribution e-mails: Mass e-mails to a group of people, easy way to get information out quickly and provide basic information that's recipients need. • E-mail, phone, Skype: Ways people communicate with faculty, staff, advisors, and other students.

5. FRAME FACTORS

5.1 This is created to provide both clarification and boundaries. Frame factors are used to identify the internal and external restraining elements on the consulting team so the aim maintains its original integrity. There are three general areas: Project; Organization; Stakeholders.

5.2 Project – availability and resource limitations

- Six-week time frame for the entire project
- Six-member team makes it hard to align schedules

5.3 Organization – limits created by the organization and environment

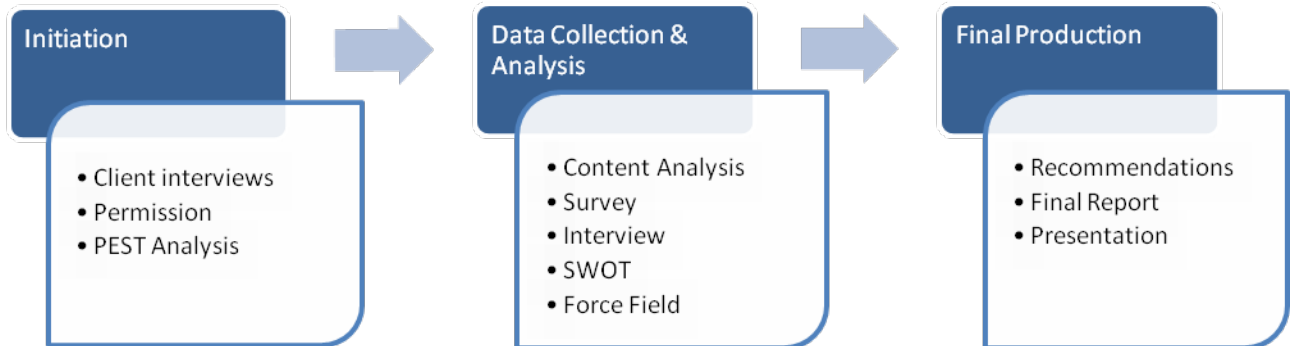
- Students needed for the study are at a distance, busy with school work and/or family
- New chair, staff, and advising structure (all in place less than a semester)
- Overcoming our bias to the project in general based on our relationship/experiences with the school and program

5.4 Stakeholders – limits placed on the project by the client

- Maintain confidentiality
- Provide opportunity for anonymity and declination to participate in data collection

6. PROJECT METHODOLOGY

6.1 Our project methodology can be briefly described in four steps: initiation; data collection; analysis; and, findings. Below, we will explain each step further.



6.2 Initiation - In the initiation step of the project, we touched base with our client to try and define a purpose for a proposal. The team interviewed the client and main stakeholder (Appendix C). This was followed by the creation, submission and acceptance of a permission letter (Appendix A). Before moving into the data collection step, the team conducted a PEST analysis.

6.3 Data Collection & Analysis - Because this study was looking at communication gaps with distance education students, a large majority of our data could be found in documents. The beginning of the data collection phase was with a content analysis of things like the actual Program of Study form, the graduate bulletin, and the IST website. Additionally to a content analysis of the website, the team benchmarked it to University of Columbia Teachers College Instructional Technology Program and Media and Florida State University Instructional Systems Program websites. After gathering and analyzing the documents, the next data source we drew from was the human side of the gap: the students via an online survey (Appendix B) – and five faculty and two staff via face-to-face semi-structured interviews (Appendix D). Using the distance student distribution lists, twenty-seven students responded to the survey. From the data collected, a SWOT analysis, and then a Force Field analysis were conducted.

6.4 Final Production - After analyzing the data of this project, the team outlined five recommendations for the client to implement. The compilation of all the recommendations is at the end of the report, so that the information can be utilized.

7. DATA ANALYSIS

7.1 SWOT looks at an organization’s internal and external factors, which are then divided into positives and negatives. The internal factors are broken into **S**trengths and **W**eaknesses. The external factors are broken into **O**pportunities and **T**hreats.

7.2 SWOT Analysis

INTERNAL	
Strengths	Weaknesses
<ul style="list-style-type: none"> • IST program has: <ul style="list-style-type: none"> ○ Website ○ Program of Study form ○ Distribution lists ○ Several distance classes • E-mail as a standard method • Student maturity 	<ul style="list-style-type: none"> • Advising <ul style="list-style-type: none"> ○ New practice ○ Accuracy and promptness ○ Roles and responsibilities • Poor website functionality • Terminology of “outside electives” is unclear • No standard orientation process
EXTERNAL	
Opportunities	Threats
<ul style="list-style-type: none"> • OneStart’s Student Center • Graduate Education Management System (GEMS) • Web communication tools 	<ul style="list-style-type: none"> • Spam filters and use of non-IU e-mail addresses • Students taking non-IU courses

8. FINDINGS

8.1 The following is a summarization of our findings post-analysis. We have separated our findings into positives and negatives. Recommendations will be drawn from these findings.

	Positive	Negative
Communication	<ul style="list-style-type: none"> Email and distribution lists are main communication methods Program of Study Form Availability 	<ul style="list-style-type: none"> No standard orientation process
Advising	<ul style="list-style-type: none"> Easy access to advisor and staff Advisor’s positive viewpoint of advising 	<ul style="list-style-type: none"> Roles and responsibilities are not defined for advisors Terminology of “outside electives” is unclear A sense of distance between Student and advisor New office staff
Resources	<ul style="list-style-type: none"> Website is the main resource Availability of advising tools (GEMS, OneStart Student’s Center) 	<ul style="list-style-type: none"> Poor website functionality

9. MIGRATION STRATEGY

9.1 The migration strategy identifies what may be causing communication gaps to and from distance master’s students. It is based on the following Force Field analysis. This tool attempts to diagnose situations with two opposing forces: those pushing for the desired state; and those pushing against the desired state.

	Current State		After 6 Months		After a year	
	Driving	Restraining	Driving	Restraining	Driving	Restraining
D1: Availability of website	5		5		5	
D2: Program of Study Form	4		5		5	
D3: E-mail and Distribution lists are standard communication tools	3		4		4	
D4: Access to faculty and office staff	3		3		4	
D5: Availability of advising tools (GEMS, OneStart Student’s Center)	2		3		4	
R1: Poor Website functionality		5		3		1
R2: Definition of terminology “outside electives”		5		3		2
R3: Roles and Responsibilities of advisors		4		3		2
R4: Lack of standard orientation process		4		4		2
R5: Willingness of faculty to advise		3		3		3
R6: Student use of non-IU e-mail accounts		2		2		2
R7: New advising structure and new office staff		1		1		
Total	+17	-24	-19	+19	+22	-12

9.2 Summary of Migration Strategy

The goal of the migration strategy is to show how the restraining forces will improve over time. A migration strategy is ideal here based off of the force field analysis. The force field shows the difference within the department over the two phases.

9.3 Current State

Restraining forces are stronger than driving forces

9.4 Phase 1 (after 6 months)

The goal of this phase is to initiate small changes to prepare for Phase 2 implementations

- Improve driving factors D2 and D3
- Improve restraining factors R1, R2, and R3

9.5 Phase 2 (after 1 year)

The goal of this phase is to implement tools that can make lasting changes for the department

- Improve driving factors D4 and D5
- Improve restraining factors R1, R2, R3, R4, R6, R7

10. RECOMMENDATIONS

10.1 Using the findings from above here are the following prioritized recommendations.

10.2 Recommendation 1

Standardize orientation materials and process.

- Create a standard process for orienting distance students.
- Orientation materials should include information about (but not limited to):
 - The advising process (who is involved, the roles and responsibilities of the advisor and of the advisee, what should be discussed)
 - The Program of Study form (what it is, when and how to complete it)
 - Graduation requirements
 - Other resources (website, IST office, etc.)

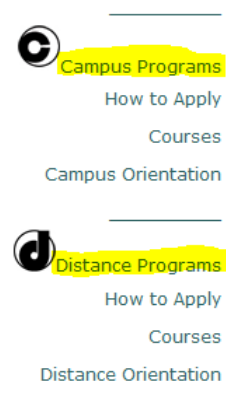
Critical Success Factors

- The desired orientation materials should be defined and/or created.
- An appropriate orientation process should be decided upon.
- Both materials and process should be created with the input of all IST employees, and after the benchmarking of other IU departments and/or other IST departments outside of IU.

10.3 Recommendation 2

Modify the content and functionality of the website.

- Make the “Campus Programs” and “Distance Programs” pages unique. (See image to the right.)
- Define what a program of study is.
 - The website provides a sample and a form, but does not explicitly explain what the program of study concept is. (Appendix #)
- Add “Complete the Program of Study form” to the list of graduation requirements.
- The “Distance Master’s Degree Program” page needs reorganizing
 - The information about “required course work” is not clear.
 - The page can be structured better, so it is not so long. (Readability)



Critical Success Factors

- Create a definition of “Program of Study.”

- Create a new structure for the “Distance Master’s Degree Program” page.

10.4 Recommendation 3

Define the terminology “outside electives”

- Ensure the language discussing outside electives is clear on the Program of Study form, on the website, and in orientation materials.
- Ensure advisors understand what constitutes an outside elective for distance master’s students.
- An example list of courses that fit the criteria of an outside elective should be created and made available to stakeholders.

Critical Success Factors

- Outside electives must be defined, which would require a discussion in the IST department.
- Recommendation 1 should be completed.

10.5 Recommendation 4

Define an advisor’s role and responsibilities.

- Define the roles and responsibilities of an advisor for faculty members. This should be in a written statement, and should include:
 - Who should initiate the advising relationship
 - What topics:
 - Need to be discussed (Program of Study; graduation requirements)
 - Should be discussed (Sequence of classes; class load vs. work load)
 - Can be deferred to the office
 - What students have been told to expect from the advising relationship
 - What tools they can use to make the most of their advising experience

Critical Success Factors

- The roles and responsibilities should be defined, which would require a discussion in the IST department.
- Students need to be made aware of what to expect from the advising relationship, including their roles and responsibilities. (Given Recommendations 1 and 2 are accepted.)

10.6 Recommendation 5

Use the advising tools in OneStart’s Student Center

- Utilize the tools under the “Academics and Grades” section in the Student Center academic portal. Sub-sections include:
 - View My Advisors
 - View My Advisement Report
 - What-if Advisement Report



Critical Success Factors

- The IST department – faculty, tools, program of study – need to be compatible with these tools in Student Center.
- Faculty would need to be trained on how to use it.
- Students would need to know to use it and how to use it.

APPENDIX A: PERMISSION LETTER



INDIANA UNIVERSITY

SCHOOL OF EDUCATION
Office of Graduate Studies
Bloomington

October 19, 2010

The University Team
Department of Instructional System Technology
W.W.Wright Education Building
201 North Rose Avenue
Bloomington, IN 47405-1006

Dear University Team,

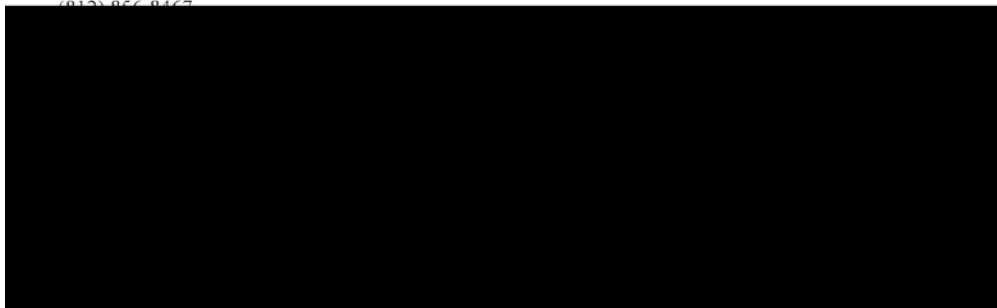
The purpose of this letter is to request your assistance in conducting needs analysis to assess and analyze the communication to and from a distance student in regards to determining and maintaining his or her given program of study in the School of Education's Instructional Systems Technology master's program. We are in the process of upgrading our support and needs analysis project should provide us with information about the underlying needs of students and faculty in the distance learning program. In addition to your recommendation and suggestions of how to improve the help and support for distance learners, contents of your report should include descriptions of the need analysis process and methods used in this project.

I am requesting that the needs analysis report be completed by December 12.

Sincerely,

A handwritten signature in cursive script that reads "Elizabeth Boling".

Elizabeth Boling
Associate Dean for Graduate Studies
Indiana University
201 N. Rose Ave.
Bloomington, IN 47405-1006
(317) 856-8467



APPENDIX B: STUDENT SURVEY QUESTIONS

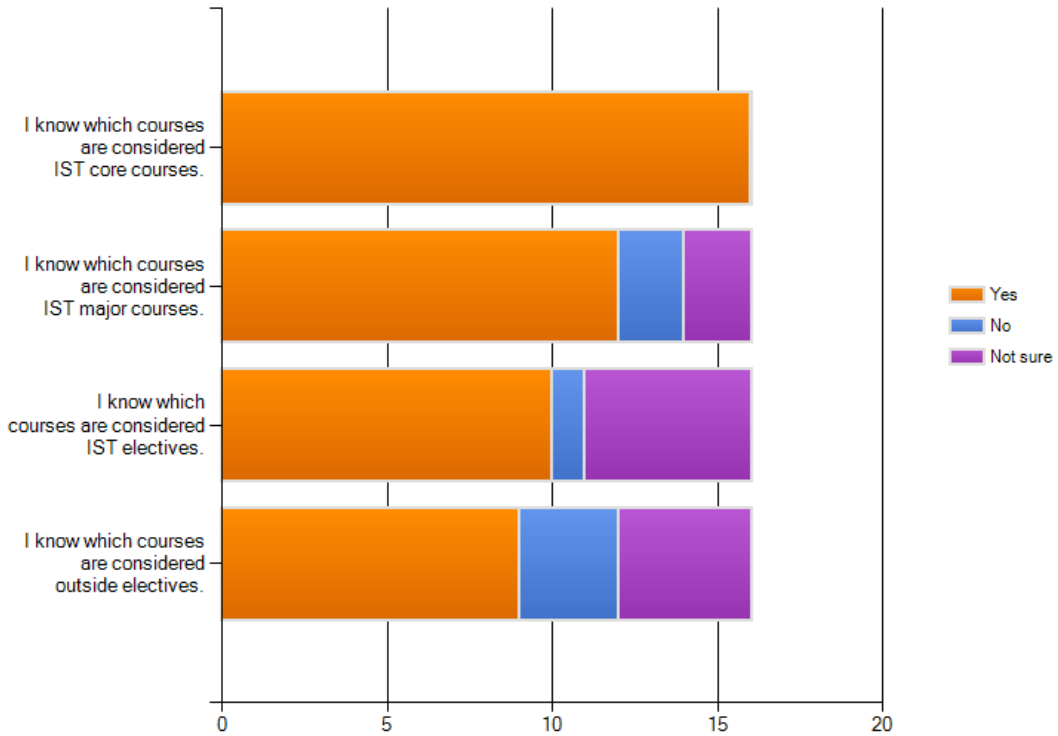
1. What age range do you belong to?
 - 22-25
 - 26-30
 - 31-40
 - 41 and above
2. Select all that apply, Outside of school I also
 - Work
 - Take care of children/parents/grandparents
 - Have extra-curricular activities
 - None of the above
3. Select all that apply, where do you use the internet for school work?
 - Home
 - Work
 - In a public location
4. I received information- digital or hard copy- explaining the requirements to earn my degree
 - Yes
 - No
 - I don't know
5. How often do you use the IST website to find the information about the requirements for graduation?
 - Never
 - Yearly
 - Each semester
 - Frequently
6. How often do you use the IST office staff to answer questions about the requirements to graduate?
 - Never
 - Yearly
 - Each semester
 - Frequently
7. How often do you use the Student Center found in OneStart?
 - Never
 - Yearly
 - Each semester
 - Frequently

8. Have you subscribed to any of the IST distribution lists?
 - Yes
 - No
 - I don't know
9. Optional: Please describe any good or bad experiences you have had with any of the aforementioned resources in clarifying your degree requirements.
10. Optional: What suggestions do you have for improving the communication between the IST office and distance students?
11. How long have you been in the IST distance master's program?
 - Less than a year
 - 1-2 Years
 - 2-3 Years
 - 3-4 Years
 - 4+ Years
12. How long do you plan to be in the IST program
 - Less than 4 years
 - 4 years
 - More than 4 years
 - As long as it takes
13. Please select the option that best describes when you entered the IST program
 - I had my path to graduation mapped out
 - I had my path to graduation roughly figured out
 - I didn't have a path to graduation plan.
14. Please select the option that best describes your mindset now.
 - I have my path to graduation mapped out
 - I have my path to graduation roughly figured out
 - I don't have a path to graduation plan.
15. How often do you communicate with your advisor?
 - Never
 - Yearly
 - Each Semester
 - Frequently
16. Select all that apply, what communication methods do you use with your advisors?
 - E-mail
 - Phone
 - Internet
 - I haven't communicated with my advisor
 - Other

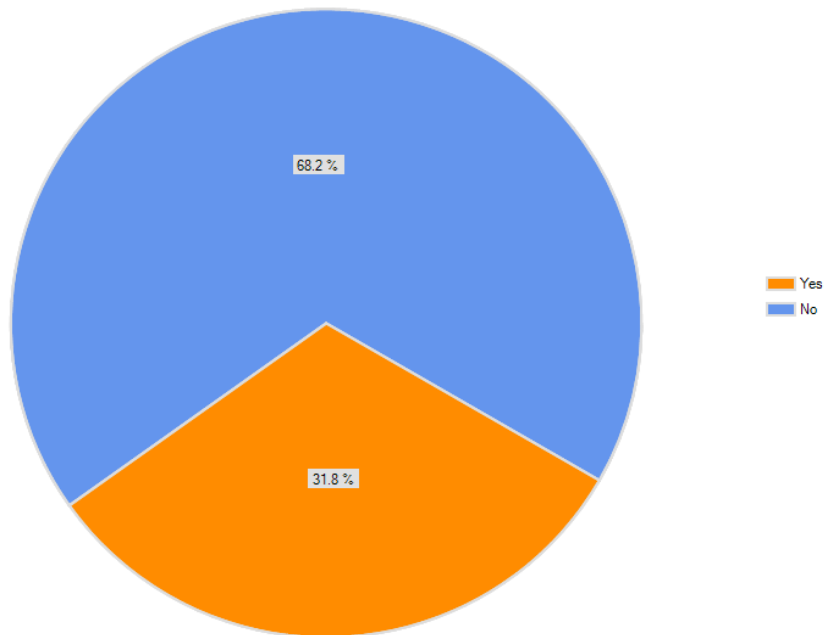
17. Select all that apply, what kind of assistance do you expect from your advisor?
- Guidance in selecting correct classes
 - Guidance in completing the program according to my timeline
 - Clarification on degree requirements
 - Approval where advisor approval is necessary
 - Other
18. What has been your overall experience in working with your advisor
- It's been great
 - It's been OK
 - It's been bad
 - I haven't worked with my advisor
19. Optional: Please describe some good or bad experiences you have had with your advisor.
20. Optional: What suggestions do you have for improving the communication between yourself and your advisor?
21. Are you familiar with the program of studies form?
Yes No
22. Have you communicated with your advisor about the program of study
Yes No
23. Do you know where to locate the program of study for on the IST website?
Yes No
24. Optional, Please take a moment (no more than 5 Minutes) and try to locate the Program of Studies form on the IST website. Please describe your experience.
25. Optional, if you found the form, please take a moment (no more than 15 minutes) and fill out the Program of Studies form. Please describe your experience.
26. Optional, I know which courses are considered IST Core Courses.
Yes No
27. Optional, I know which courses are considered IST Major Courses.
Yes No
28. Optional, I know which courses are considered IST Electives.
Yes No
29. Optional, I know which courses are considered outside electives.
Yes No

APPENDIX C: STUDENT SURVEY RESULTS (SELECTED BASED ON RECOMENDATIONS)

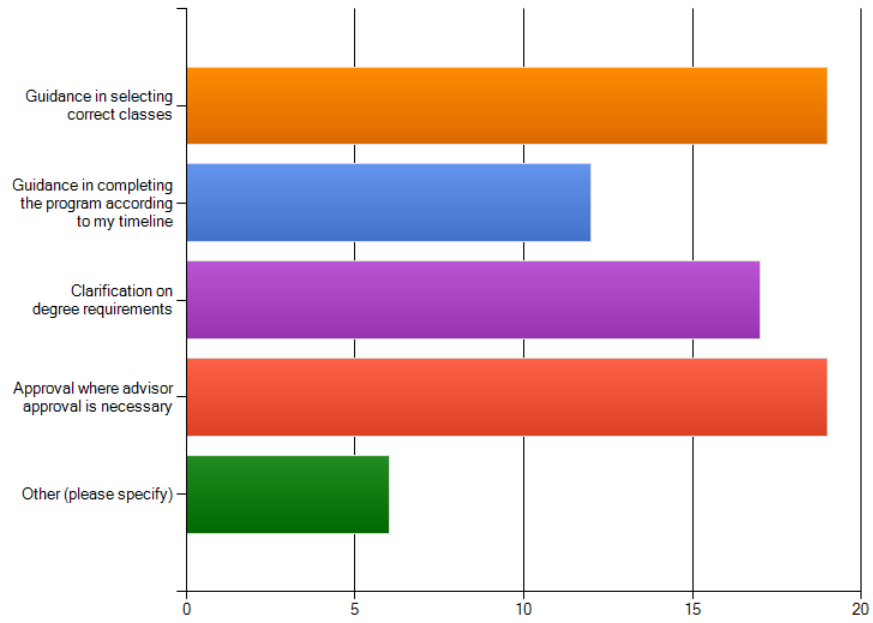
(Optional) Looking at the Program of Studies form, please answer the following questions:



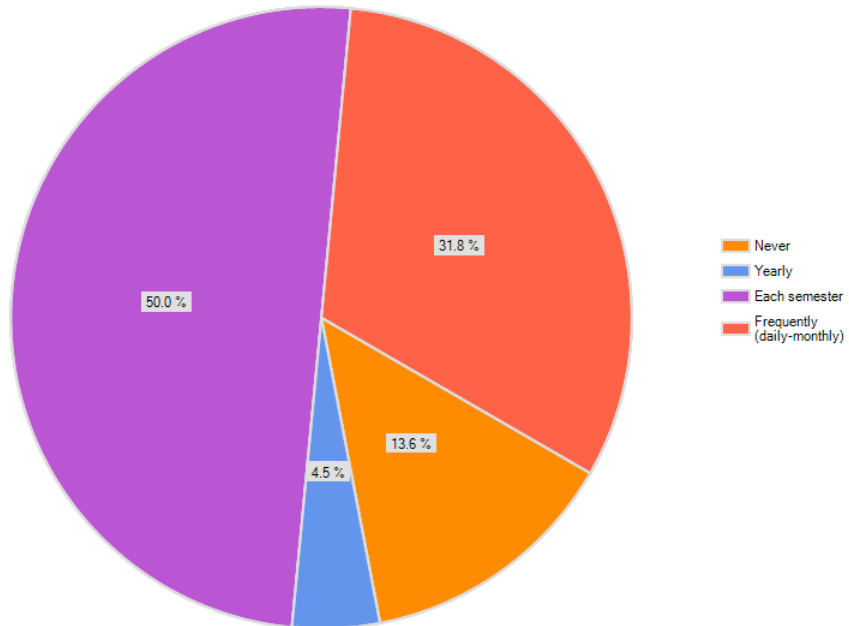
Have you communicated with your advisor about the program of study?



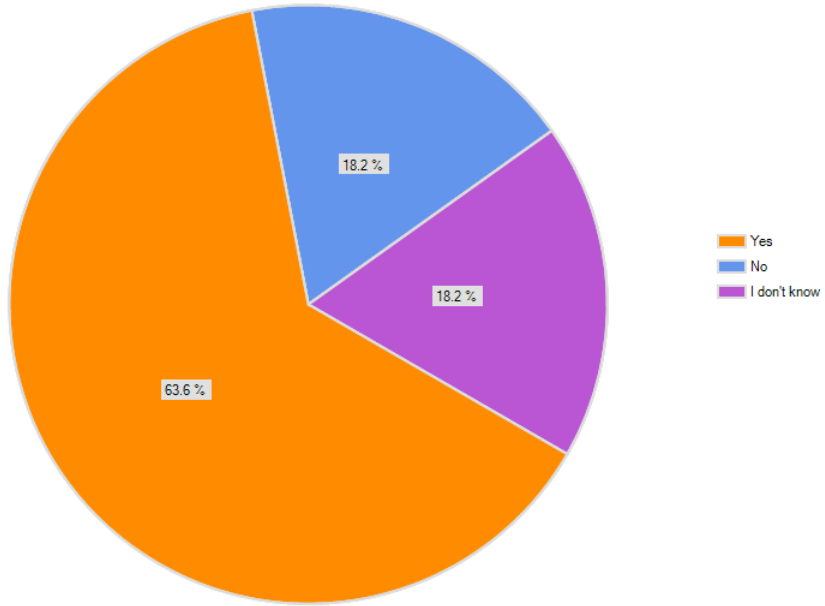
(Select all that apply) What kind of assistance do you expect from your advisor?



How often do you use the Student Center found in OneStart?



I received information – digital or hard copy – explaining the requirements to earn my degree.



(Optional) Please take a moment (no more than 5 minutes) and try to locate the Program of Studies form on the IST website. Please describe your experience. (Did it take long? Was it easy?)

First, there is an assumption that I would know what a Program of Studies form is, why I need it, etc. If I perform a search I can find find a link. Digging through the site I found it as well, but I was looking. A casual observer might not see it in the See Also section under Forms in electronic format. Based on where and how I found it, I'd guess it wasn't that important a form. Going through the actual major then finding it in the top nav under Planning Your Program makes more sense, but what you are presented with is a page of 20 links. The Program of Studies Form is 3rd in both lists. It is findable, but again, I'd have to want to find it. Why not just make it part of the course description as a link if it has import.

Fairly easy to find

4 clicks - no problem

Yes

It wasn't where I thought; it didn't draw attention to itself in any way, so I had to look around a bit; it didn't explain what it is or why it matters; it took about one minute.

I had a link from the Department, so it was easy.

It was easy as I have gone there many times :)

It took approximately 20 seconds to find the form. It was easy.

It was moderate. I didn't find it right away, guessed at what category to select, but guessed right and found it because I knew I had seen it before.

entered into the search option of the IU website with the following results "Results 1 - 10 of about 75700. Search took 0.12 seconds" I then went to the IU website, School of Education, IST program and eventually found it under Forms in electronic format, it took multiple links and I believe I found it because I knew the name of what I was looking for. It took approximately 4 minutes

Can I offer a suggestion regarding this survey? There's no way to return to previous answers. I wanted to add that one way to improve communication between students, advisers, professors, and IST administrative staff would be to incorporate an on campus orientation weekend. It would be great to have met my adviser face-to-face before starting the program. It also would have been lovely to meet some of my classmates in person. Just a thought....

APPENDIX D: INTERVIEW QUESTIONS

Client Interview Questions

1. Can you clarify for us again, what is the program of study and when is it used?
2. Overall, what was/is your experience in regards to advising distance students?
3. What was/is your experience in regards to advising distance students on the program of study? What questions/concerns/issues frequently came/come up?
4. How did/does advising distance students compare to advising residential students? What were some big differences? What were similarities? (Communication tools, problems, advising points, etc.)
5. What problem did/do you see in regards to a distance student's program of study? Were there problems communicating about it, in maintaining it, in having it at all?
6. How do those problems compare to residential students? Are they the same, similar, or completely different?
7. In your opinions, what do you think the root of the problem is, in advising distance students on the program of study? Is it technical or personal issues, or both?
8. When does the department typically inform students about the program of study? In orientation? In advising sessions? When it is missing?
9. What kind of information that the students receive once they are admitted?
10. In your opinion, do the students have easy access to the program of study form, and to the information clarifying how to complete the form?
11. What is the advisor's role in communicating the program of study and its importance? What end result – in this communication – is a "success" and what is a "failure"?
12. How the task of advising is described in the job description for either faculty or staff?
13. Do you think advisors have sufficient information regarding the program of study?
14. Do you feel clarifying and maintaining a given program of study is the responsibility of the student or the advisor, or both? If both, is the weight shared, or is one party more responsible than the other?
15. What role do you think staff should have in advising students on the program of study? Should they have any at all?
16. How would you compare the students' attrition between the residential and the distance? How would you compare a delay in expected graduation date?
17. What kind of communication method that you usually did with the students that you advise?
18. How is the ratio between distance students and advisors?
19. Does the advisor will still give advice to their students if they were in sabbatical?

Faculty Interview Questions

1. How many distance students are in IST right now?
2. What is your main communication method with distance students?
3. How many emails from the distance students do you receive everyday?
4. How many phone calls from the distance students do you receive everyday?
5. What kind of questions do the distance students ask to you?
6. What do you see as your role in communicating with distance students?
7. Do you know what a program of study is?
8. Have you ever receiving any questions from the distance students about the program of study form? If yes, what kind of question is that?
9. Do you think the IST website is a good resource for distance students? Why or why not?
10. Do you think the School of Education's bulletin is a good resource for distance students? Why or why not?
11. If you had a communication barrier with distance students, in your opinion, what is the root of the problem?
12. What are some suggestions do you have for improvement?

Staff Interview Questions

1. How many distance students are in IST right now?
2. What is your main communication method with distance students?
3. How many emails from the distance students do you receive everyday?
4. How many phone calls from the distance students do you receive every day?
5. What kind of questions do the distance students ask to you?
6. What do you see as your role in communicating with distance students?
7. Do you know what a program of study is?
8. Have you ever receiving any questions from the distance students about the program of study form? If yes, what kind of question is that?
9. Do you think the IST website is a good resource for distance students? Why or why not?
10. Do you think the School of Education's bulletin is a good resource for distance students? Why or why not?
11. If you had a communication barrier with distance students, in your opinion, what is the root of the problem?
12. What are some suggestions do you have for improvement?

Critical Incident Method

1. Are you familiar with the Program of Studies form and/or concept?
2. Have you communicated with your advisor about the program of study?
3. Do you know where to locate the Program of Studies form on the IST website?
4. Please take a moment (no more than 5 minutes) and try to locate the Program of Studies form on the IST website. Please describe your experience. (Did it take long? Was it easy?)

5. If you found the form, please take a moment (no more than 15 minutes) and fill out the Program of Studies form. Please describe your experience.