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The Advanced Distributed Learning (ADL) Vision and Getting From Here To There

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INSTITUTE FOR DEFENSE ANALYSES

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PREFACE

This work was performed under the “Advanced Distributed Learning Common Framework” task. Technical cognizance for this task is assigned to Dr. Robert Wisher, Office of the Under Secretary of Defense for Personnel and Readiness, Readiness and Training Directorate.

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EXECUTIVE SUMMARY

The Advanced Distributed Learning (ADL) initiative was undertaken by the Department of Defense (DoD) at the request of the White House Office of Science and Technology Policy (OSTP) and in cooperation with the other Federal Agencies. Its goal is to make education, training, and performance aiding accessible anytime and anywhere. This goal is being pursued through intense and frequent interactions among industry, government, and academic participants. ADL specifications are now being adopted across Europe, Asia, the Pacific Rim, and the Americas.

In the near future, much of what we learn may be based on open, anytime, anywhere interactions accessing something that approximates the whole of human knowledge. This access will be achieved through a variety of capabilities, many of which (e.g., computer technology, global communications, and the World Wide Web or its successors) are already in place. Interactions based on this access can be tailored to each learner's abilities, prior knowledge, interests, and preferred learning style(s). The ADL vision assumes that interactions will be generated in real time and on-demand to allow the free-flowing, mixed initiative give-and-take that is characteristic of true conversation.

These education, training, and performance-aiding interactions may take place as conversations that address what the user needs or wants to know at the moment. They are likely to be mediated by personal learning associates that will be wireless and voice interactive but also capable of most other modes of interaction, including a full range of media. Physically, these devices may be hand held (possibly combined with the game-playing, photograph-taking, instant-messaging, video telephones we have today), worn, or even implanted.

If real-time, on-demand interactions—conversational or not—are to tap into the World Wide Web, they will need to identify and access objects that are accessible, portable, durable, and reusable. Development of the Sharable Content Object Reference Model (SCORM) was based on these considerations. SCORM defines the interrelationship of objects, data models, and protocols so that instructional objects can be shared across all conforming systems. SCORM is now stabilized and being used to create education, training, and performance-aiding materials. More than 5 million objects conforming to SCORM specifications exist and are in use.

The Content Object Repository, Discovery, and Resolution Architecture (CORDRA) is a related development being undertaken in cooperation with the Corporation for National Research Initiatives (CNRI). It is focused on identifying ("discovering") and then locating the precise object(s) needed for an application or an interaction. CORDRA will rely on metadata to specify and locate objects, but its system of registries will allow access to any registered, but locally controlled, repository. Its naming conventions will track objects as they are modified and moved from repository to repository.

The Semantic Web, which is being developed under the auspices of the World Wide Web Consortium, is also included in ADL planning. It is intended to improve cooperation between computers and human beings by imbuing Web information with meaning. Through a system of ontologies, it will identify and expose semantic linkages between bodies of knowledge regardless of how disparate they appear to be. It will allow more comprehensive and substantive models of subject matter domains and learners' levels of mastery than we now have and combine them with more precise discovery of the instructional objects needed to produce desired human competencies.

Four possibilities (among others) in education and training may arise from the ADL environment:

1. **Less predefined sequencing.** Instructional design as a process of prespecifying and predefining a sequence of activities must evolve if the ADL vision of on-demand, real-time access is to be realized fully.
2. **More assessment and fewer tests.** Assessment will become continuous and unobtrusive as capabilities evolve for developing a model of the learner from routine interactions.
3. **Fewer "lessons."** The notion of instructional modules will need to evolve to support instructional interactions generated on-demand and in real time.
4. **More reliable outcomes.** Instruction will need to become more of an engineering discipline in which specific outcomes are reliably achieved for all learners. This discipline will rely on detailed knowledge of the learner's prior and developing competence matched with comprehensive representations of the subject matter and instructional techniques.

With or without ADL, fully accessible, anytime, anywhere education, training, and performance aiding seem inevitable. They are likely to require structural and organizational changes in current procedures and practices. Sooner or later, existing organizations must deal with this evolution and its emerging processes, capabilities, and opportunities. It may be time to begin addressing the procedural and administrative opportunities and issues presented by ADL technical capabilities.

THE ADVANCED DISTRIBUTED LEARNING (ADL) VISION AND GETTING FROM HERE TO THERE

A. ABOUT ADL

The ADL initiative was undertaken by the Department of Defense (DoD) at the request of the White House Office of Science and Technology Policy (OSTP) and in cooperation with the other Federal agencies. It is intended to provide a model for all Federal agencies in making education, training, and performance aiding readily accessible—anytime, anywhere. It is being developed through intense and frequent collaboration among industry, government, and academic participants, and its specifications are being adopted across Europe, Asia, the Pacific Rim, and the Americas.

ADL is expected to deliver both training and education. Training is a means to an end and prepares individuals to perform specific tasks and jobs. Education is an end in itself and prepares individuals for life. The knowledge representations and user interactions underlying these instructional applications are identical to those needed to assist users in decision-making, planning, problem solving, maintaining and operating equipment, and other performance-aiding functions. For these reasons, along with the costs to be saved by providing such functions (e.g., Fletcher and Johnston, 2002), performance aiding and instruction are significant objectives of the ADL initiative (Wisher and Fletcher, 2004; Dodds and Fletcher, 2004). However, performance aiding is a substantial topic by itself, and, in this document, space considerations limit the discussion of its possibilities, promise, and implications.

The implications of the ADL initiative are not limited to Federal agencies. It presents opportunities and challenges to many other settings, including classroom instruction. Its anytime, anywhere instructional goals include classrooms, workplaces, conference rooms, job sites, and homes. However, the wide access to instruction that ADL will provide students outside traditional instructional institutions and venues challenges instructors, administrators, policy makers, and students themselves to assume new and unaccustomed roles with new and unaccustomed responsibilities.

With or without ADL, fully accessible anytime, anywhere education (and training and performance aiding) is likely to become a reality. If nothing else, ADL is a harbinger of future learning processes, capabilities, and opportunities that our instructional institutions must address sooner or later. If they do so successfully, their efforts will benefit everyone concerned with human learning and performance.

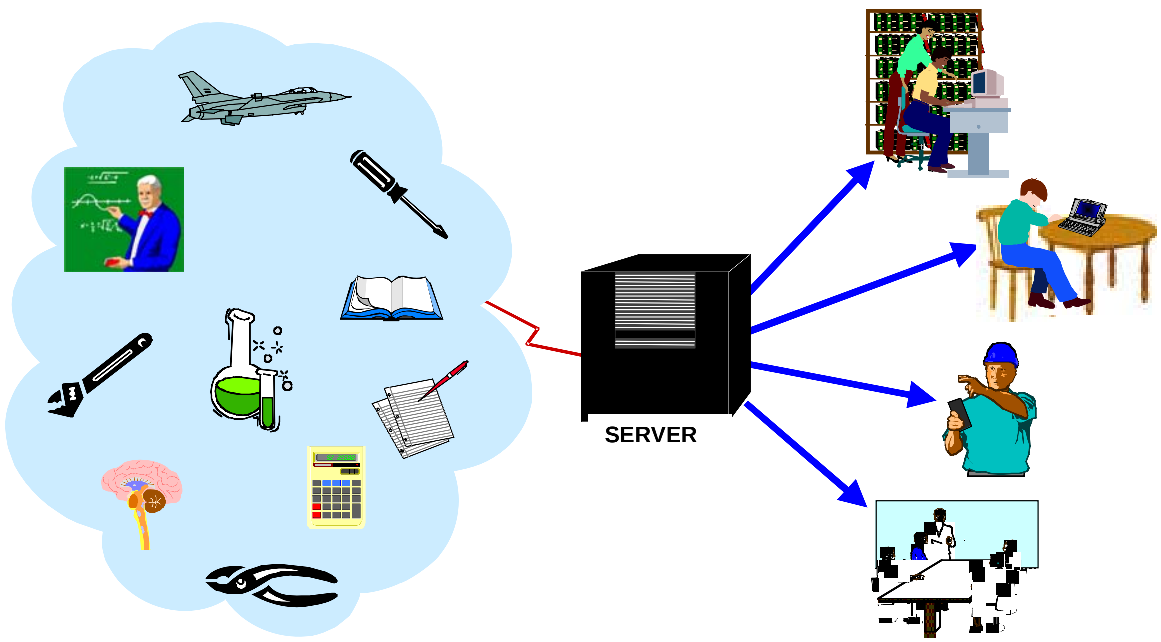
B. THE ADL VISION

The ADL initiative is based on the view of future education, training, and performance aiding illustrated in Figure 1. As the figure suggests, this view, or "vision," keys on three main components:

1. **A Global Information Grid**—currently the World Wide Web—shown as the cloud on the left side of the figure provides an infrastructure populated by reusable instructional objects
2. **A Server**, shown in the middle of the figure locates and then assembles instructional objects into education, training, and/or performance-aiding materials tailored to user needs
3. **Devices**, shown on the right side of the figure, can be carried or worn and serve as personal learning associates that deliver education, training, and performance aiding to users anywhere, anytime.

From an instructional point of view, the critical element in this vision is the Server. It will assemble material needed to support interactions with learners and users on-demand and in real time. These interactions will be tailored to the needs, capabilities, intentions, and learning state of each individual or group of individuals. ADL's long-term vision is to establish instruction and performance-aiding interactions between technology and (human) users that consist of goal-directed *conversations* tailored to each learner's or user's needs, skills, knowledge, abilities, and interests.

Such goal-directed conversations must draw on effective instructional strategies, accurate representations of the user, and comprehensive representations of relevant subject matter. Generative systems of this sort have been the objective of DoD research and development (R&D) investment since the mid-1960s (Carbonell, 1970; Fletcher and Rockway, 1986; Fletcher, 1988). They are the original goal of what today are called Intelligent Tutoring Systems (ITSs). DoD supported generative capabilities not so much as a clever application of artificial intelligence (AI), but as a way to reduce instructional



Sharable content objects (SCOs) from across the World Wide Web assembled in time, on-demand to provide learning and assistance anytime, anywhere.

Figure 1. An ADL Future

materials' preparation by substituting the capital of technology and automation for human labor (Fletcher and Rockway, 1986). These capabilities remain essential to achieving the long-term goals of ADL.

C. THE BASIS FOR ADL

ADL goals arise from four main technological opportunities:

1. Advances in electronics
2. The pervasive accessibility of the World Wide Web
3. Capabilities developed for ITSs
4. Emerging specifications for reusable, sharable instructional objects.

1. Electronics

The first and most obvious technological opportunity keys on the rapid development of digital electronics spurred on by the operation of Moore's Law (Service, 1996; Mann, 2000). As readers may recall, Gordon Moore is a semiconductor pioneer and co-founder of the Intel Corporation. In 1965, Moore noted that engineers were doubling the number of electronic devices (basically transistors) on chips every year. In 1975, he revised his prediction to say that the doubling would occur every 2 years. If we split the difference and predict that it will occur every 18 months, our expectations fit reality quite closely.

A consequence of Moore's Law is that computers initially selling for $3,000 may cost about half that amount 18 months later. Another consequence is that the delivery devices shown on the right side of Figure 1 will continue to decrease as much in physical size and cost as they will increase in functionality—not unlike today's cellular telephones, which may provide ubiquitous platforms for ADL delivery.

2. The World Wide Web

The second technological opportunity underlying ADL arises from the development and implementation of the Global Information Grid, which currently takes the form of the World Wide Web. The Web made feasible DoD's goal of accessible education, training, and performance aiding available anytime and anywhere. Development of the Semantic Web will contribute substantially to achieving the long-term interactive instructional goals of ADL by providing the semantic linkages needed to create comprehensive representations of subject matter, expertise, learners, and users.

3. ITSs

The third technological opportunity is presented by the generative capabilities of ITSs. Successful ADL development assumes that its functionalities must be tailored to the specific needs, abilities, goals, and interests of the individual student or user (Fletcher, 2003; Wisher and Fletcher, 2004; Dodds and Fletcher, 2004). This tailoring, or individualization, is as critical for performance aiding as it is for education and training. ADL functions are expected to provide what Brown, Burton, and DeKleer (1982) called articulate expertise. Not only must these functions provide helpful and relevant guidance, but they must do so in a way that the learners and users, who have varying levels of knowledge and skill, can understand. ADL will, therefore, need to be "intelligent"—building on capabilities that have been the developmental province of ITS.

At this point, emphasizing the capabilities provided by "non-intelligent," computer-based instruction programs since the 1950s may be worthwhile. These programs have been able to

- Accommodate an individual student's rate of progress, allowing as much or as little time needed by each student to reach instructional objectives

- Tailor the content and the sequence of instructional content to each student's needs
- Make the instruction as easy or difficult, specific or abstract, applied or theoretical as necessary
- Adjust to a student's most efficient learning styles (collaborative or individual, verbal or visual, and so forth).

These capabilities have been described, discussed, and reviewed by Galanter (1959), Atkinson and Wilson (1969), Suppes and Morningstar (1972), Fletcher and Rockway (1986), and many others. To one degree or another, they have been implemented and available in computer-based instruction (CBI) since its inception.

"Intelligence" in ITSs is a different matter and more than a marketing term. When it was first introduced into CBI, it concerned specific goals. The distinction between ITSs and other CBI was keyed to these goals. The phrase "intelligent tutoring system" implied serious and clear technological advances. It referred to specific capabilities that were first targeted in the 1960s (Carbonell, 1970; Sleeman and Brown, 1982). Two of these defining capabilities are that ITSs (1) allow either the system or the student to ask open-ended questions and initiate instructional, "mixed-initiative" dialogue as needed or desired and (2) generate instructional material and interactions on-demand rather than requiring developers to foresee and pre-store all the materials and interactions needed to meet all possible eventualities.

Mixed-initiative dialogue requires a language for information retrieval, decision-aiding, and instruction that is shared by the system and the student/user. Natural language has been a frequent choice for this capability (e.g., Brown, Burton, and DeKleer, 1982; Graesser, Person, and Magliano, 1995), but the language of mathematics, mathematical logic, electronics, and other well-structured communication systems have also been used (Barr, Beard, and Atkinson, 1975; Suppes, 1981; Sleeman and Brown, 1982; Psotka, Massey, and Mutter, 1988; Woolf and Regian, 2000).

Generative capability requires the system to devise interactions with students on-demand—not draw from predicted and pre-stored formats This capability involves not only generating problems tailored to each student's needs, but also providing coaching, hints, critiques of completed solutions, appropriate and effective teaching strategies, and, overall, the interactions and presentations needed for one-on-one tutorial instruction. These interactions must be generated from information primitives using an "instructional grammar" that is analogous to the deep structure grammar of linguistics.

Motivations for the aforementioned capabilities can be found in the perennial desire for cost containment accomplished by generating rather than anticipating and pre-storing responses to all possible student states and actions. However, they also arise from basic research on human learning, memory, perception, and cognition. In the 1960s, as documented by Neisser (1967) among others, the emphasis in basic research and understanding of human behavior shifted from the strict logical positivism of behavioral psychology, which focused on directly observable actions, to consideration of the internal, cognitive processes that were needed to explain empirically observed behavioral phenomena and are assumed to mediate and enable human learning.

The hallmark of this approach is the understanding that seeing, hearing, and remembering are all acts of *construction*, making more or less use of the limited stimulus information provided by our perceptual capabilities. Constructivist approaches are the subject of much current and relevant discussion in instructional research circles (e.g., Duffy and Jonanssen, 1992; Tobias and Frase, 2000), but they are firmly grounded in the primordial foundations of scientific psychology. For instance, William James (1890/1950) stated his General Law of Perception as follows: “Whilst part of what we perceive comes through our senses from the object before us, another part (and it may be the larger part) always comes out of our mind” (p. 747).

In this sense, the generative capability sought by ADL and ITS developers is not merely something nice to have but is essential if we are to advance beyond the constraints of the prescribed, pre-branched, programmed learning, and ad-hoc principles commonly used to design CBI. We need an interactive, generative capability if we are to deal successfully with the extent, variety, and mutability of human cognition.

As stated, the ADL vision is that training, education, and performance aiding will take the form of human-computer conversations. This capability has been realized in systems that could converse in a formal language, such as computer programming [e.g., Binary Integer Programming (BIP) (Barr, Beard, and Atkinson (1975)] or propositional calculus [e.g., EXCHECK (Suppes, 1981)] or could base the conversation on determinate technical phenomena using clearly defined and well understood terms [e.g., SOPHIE, (Brown, Burton, and DeKleer, 1982)]. More recent research, such as that presented by Graesser, Gernsbacher, and Goldman (2003), suggests that significant natural language dialogue capabilities are achievable. Currently, however, they remain closer to the “bleeding edge” of technology than to the mainstream. Although the ability to assemble reusable objects in real time and on-demand into meaningful instructional or performance-aiding conversations has yet to be demonstrated conclusively, progress in the development of ITSs suggests that it is not an unreasonable goal.

4. Instructional Objects

Finally, ADL keys on technological opportunities offered by instructional objects. ADL development is presently focused on packaging instructional objects in anticipation of what has been called by Spohrer, Sumner, and Shum (1998) the "educational object economy." In such an economy, the emphasis in preparing materials for technology-based instruction (or performance aiding) will shift from the current concern with developing instructional objects themselves to one of integrating already available objects into meaningful, relevant, and effective interactions.

The recent evolution of instructional objects has not escaped the attention of researchers. In assessing the educational value of objects, Roschelle and Kaput (1995) emphasized the ability to combine many kinds of interactive content in multiple display formats and obtain for education the benefits now being realized in business from the use of integrated office software. Roschelle et al. (1999) described software technologies underlying the development of five object-based education projects and reviewed their relative effectiveness. Gibbons, Nelson, and Richards (2000) reviewed in detail the nature and value of instructional objects for educational applications and concluded, along with Wiley (2000), that instructional objects are the technology of choice in supporting the evolution of technology-based instruction because of their potential for reusability, adaptability, and scalability. Wiley (2000) provided the first scholarly, book-length treatment of instructional objects, and others may be expected to follow. However, beyond the economies, capabilities, and other benefits discussed by these researchers is the possibility that the development of sharable instructional objects opens the door to genuinely generative instruction.

Instructional objects may then supply the primitives from which instructional interactions can be created on-demand and in real time and serve as reusable instructional components that reduce the costs of developing basic instructional materials, including graphics, simulations, and simulation scenarios (e.g., Towne, 1998, 2003). An economically viable, generative capability for instruction, in turn, depends on specifications for the development of sharable instructional objects.

Developing these specifications has become a significant activity of the ADL Initiative. The specifications are intended to separate objects from context-specific, run-time constraints and proprietary systems so that the objects can be incorporated into other applications. They prescribe common interfaces and data interchange procedures so instructional objects can be aggregated into assemblies that guide and assist learners and users. Instructional objects so specified must be

- **Accessible.** Objects in one remote location should be able to be identified, located, and accessed and then delivered to many other locations when and where they are needed.
- **Interoperable.** Objects developed in one location with one set of tools or platform should be accessible and usable in other locations with different tools operating in different environments on different platforms.
- **Durable.** Objects should be able to withstand technology changes (including version changes and upgrades) without having to be redesigned, reconfigured, or recoded.
- **Reusable.** Objects should be sufficiently flexible to be used in multiple applications and contexts.

These criteria underlie the Sharable Content Object Reference Model (SCORM), which is an evolving specification for creating instructional objects that meet these criteria (Dodds, 2002; Wisher and Fletcher, 2004; Dodds and Fletcher, 2004). The SCORM specification is by no means the totality of ADL, but it provides a basis for populating the World Wide Web, or whatever form the Global Information Grid takes in the future, with a ready supply of accessible, useable instructional objects. Once these objects exist, they must be identified, assessed, selected, and assembled in real time and then handed to devices that deliver instruction and/or performance aiding. As stated, this is the job of the Server shown in the middle of Figure 1. By importing "logic" or instructional strategy objects, as well as "content" objects, the Server may also acquire expert tutoring capabilities.

This vision and view of instruction and performance aiding conducted through human-computer conversations seem inevitable. Sooner or later, computer and instructional technology will produce personal learning associates that have the functionalities envisioned by ADL. The ADL initiative seeks to bring about instructional efficiency and knowledge accessibility sooner rather than later. Although difficult issues remain to be resolved, the most intransigent barriers to this future may be those arising from the current institutions, organizational structures, instructional practices, and administrative policies that are now vested in instruction conducted as lessons for students gathered together in one place and at one time (i.e., instruction conducted in classrooms and not as tutorial conversations available to individuals anytime, anywhere). Although ADL technologies can be used as easily in the classroom as not, their impact will be to shift the emphasis in instructional practice, organizations, and approaches away from classrooms and onto individual users (Fletcher and Tobias, 2003).

D. WHAT ABOUT INSTRUCTIONAL DESIGN?

With SCORM, ADL has begun a process to populate the cloud on the left side of Figure 1. The process assumes continued development of sharable instructional objects; continued development, expansion, and use of the World Wide Web; continued influence of Moore's Law on the cost and capabilities of electronics; and increasingly powerful, portable, and affordable electronic devices, which are depicted on the right side of Figure 1. How might the Server (in the middle of Figure 1) operate to assemble instructional objects into effective instructional (and performance-aiding) interactions? How might it design these interactions?

At present, a gap exists between the one-of-a-kind, monolithic products of CBI development and ITSs and the object-based development targeted by ADL. The SCORM specifications are intended to make instructional components sharable and reusable by either computers and/or the human designers who assemble these components into instructional (and performance-aiding) interactions. These specifications attempt to bridge the gap between ADL goals and current instructional design by providing a foundation for object-based assembly that begins with relatively small, reusable learning resources, which are then aggregated to form units of instruction (or performance aiding). By themselves, the objects may have no specific context. However, when they are combined with other objects, the resulting aggregation provides context and enables interactions with users in a sustained instructional or problem-solving conversation.

Working forward from SCORM, we might well ask how its specifications and operating principles for instructional objects affect and shape the process of instructional design. SCORM has evolved through a series of versions, each intended to build on—rather than replace—previous versions. Its organizational structure may be described as a set of semi-independent functions. The SCORM specifications (currently available at http://www.adlnet.org/) integrate and harmonize application details and requirements drawn from various standards and other specifications. They can be summarized as the following:

- The **SCORM Content Aggregation Model** describes how to develop sharable instructional objects, package them for exchange from system to system, and describe them for search and discovery.
- The **SCORM Run-Time Environment** describes the Learning Management System (LMS) (or Server) requirements needed to manage the ADL run-time environment. It covers materials launch, communication between materials and Server, data model elements for sharing information about the learner's progress and needs, and so forth.
- The **SCORM Sequencing and Navigation** describes how SCORM materials can be sequenced through a set of learner-initiated or system-initiated navigation events. Branching and flow can be described by a predefined set of activities, determined at design time or generated as needed on-demand.

Although the SCORM Content Aggregation and Run-Time Environment specifications present functions essential to ADL, the SCORM Sequencing and Navigation is the specification that most profoundly affects the process of instructional design. With "sequencing," software engineers discuss what instructional designers might call "branching," and, with "navigation," they address issues that instructional designers might call "learner control." The SCORM specifications ensure that the sequencing and navigation established by any conformant development environment using any conformant tools will operate successfully and as required by the developer(s) in any SCORM-conformant run-time environment.

The SCORM Sequencing and Navigation specifications are based on "use cases" drawn from already delivered and currently used technology-based instruction. These examples and the Sequencing and Navigation specifications developed for them key on techniques that are, at base, what instructional designers may recognize as Keller's Personalized System of Instruction (PSI) (Keller, 1968) and Crowder's intrinsic programming (Crowder, 1959).

Keller's PSI involves a process of breaking up a course of instruction into an ordered series of modules and then pre-testing students for their mastery of each module's content before beginning work in it (Keller, 1968). Students who pass the pre-test skip the module and proceed to a pre-test for the next module in the series. Students who do not pass the pre-test are required to complete the module and then be retested. They repeat this process until they pass the test—in practice, one of several parallel tests—and only then do they proceed to the next module.

Various studies have found PSI to be effective. A meta-analysis of 75 empirical comparisons of PSI with standard classroom practices was reported by Kulik, Kulik, and Cohen (1979). They found that the PSI programs they reviewed raised final examination scores by about 0.50 standard deviations, roughly an increase in the performance of 50th percentile students to that of 69th percentile students. They also found that PSI produced less variation in achievement, higher student ratings, and fewer course withdrawals. Despite these favorable results, Keller (1985) grew pessimistic about the use of PSI because of the substantial amount of instructor time required to set up PSI courses and the lack of support (mostly in the form of release time) from administrators.

Crowder's intrinsic programming (1959) is interesting because it and not Skinner's approach (1954) is the one almost exclusively found in practice even though Skinner's extrinsic programming is most frequently cited as the backbone of programmed instruction. Crowder's approach will be familiar to most instructional developers. An example is the following:

In the multiplication $3 \times 4 = 12$, the number 12 is called a ________.

A: Factor {Branch to remedial X1}

B: Quotient {Branch to remedial X2}

C: Product {Reinforce, go to the next item}

D: Power {Branch to remedial X3}.

In this item, the system, the computer instructor assumes that a student choosing "A" misunderstands the meaning of "Factor," or lacks an understanding of "Product," or both. The student is branched to instructional items intended to correct one and/or the other of these cognitive states and is then returned to this or a similar item to try again. A similar remedial approach is applied if answers "B" and "D" are chosen. A student who chooses "C" is usually rewarded ("reinforced") with encouraging, or positive, feedback and then sent on to whatever item best continues his or her progress through the instruction, an action that by itself may constitute positive reinforcement.

These two approaches for sequencing between modules (PSI) and within modules (intrinsic programming) provide the bases for much of the CBI delivered today and, either consciously or not, the use cases that the SCORM Sequencing and Navigation specifications were intended to accommodate. Figure 2 shows a comparison between CBI branching and SCORM sequencing. The typical CBI branching structure on the left

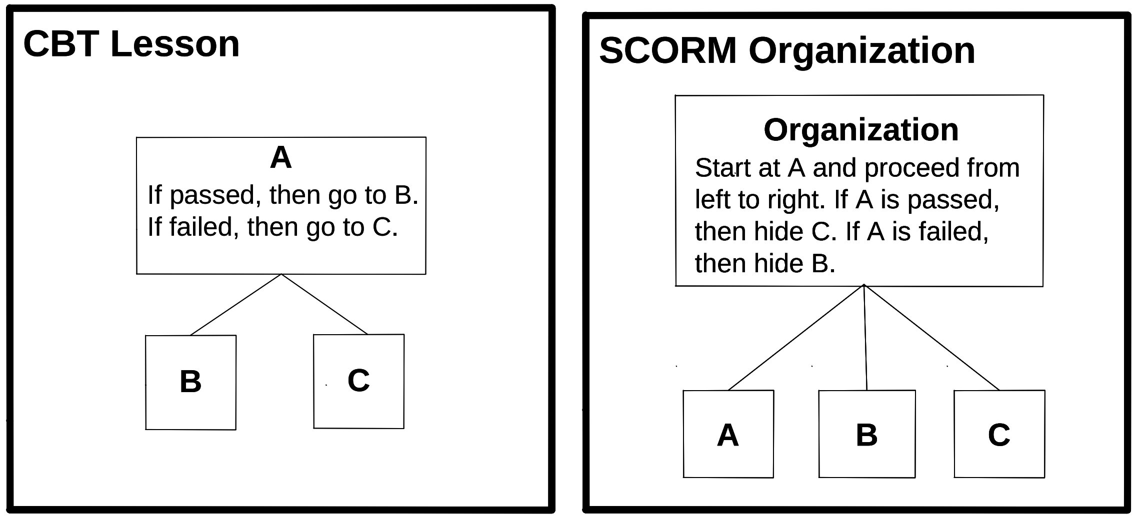


Figure 2. Comparison of CBI Branching and SCORM Navigation

would be implemented as shown on the right by using SCORM Sequencing and Navigation. Both sides of the figure depict typical Keller PSI branching, although it is not difficult to see how the same schemes might be extended to within-module Crowder intrinsic programming. Boxes A, B, and C can all be instructional objects (even if one or more of them is an assessment module), or they can be assembled from more granular objects by the Server.

The elements shown in Figure 2 can be used as a basis for an entire course by repeating and extending them into a comprehensive tree structure that starts with a single entry point and branches out to as many modules as are needed. In this way, SCORM Sequencing and Navigation accommodate Keller's and Crowder's approaches and others as well. Learners proceed through the tree from module to module until they run out of modules and can proceed no further. At that point, they are done with the course, unit, or lesson.[1]

The SCORM Sequencing and Navigation specifications then assume that most learning design strategies can be represented as a tree of learning modules and that instructional designers will be able to map their instructional designs and strategies into this structure. SCORM allows access to global variables that can be used to communicate data from one module or object in the tree to another. It also allows modules to be invisi-

1 Figure 2 is adapted from SCORM Best Practices Guide for Content Developers (2003), prepared by the Carnegie Mellon Learning Systems Architecture Lab (LSAL) (http://www.lsal.cmu.edu/) to assist instructional developers. Readers who want more information about implementing instructional strategies under SCORM Sequencing and Navigation are encouraged to consult this publication.

ble to learners, thereby permitting the use of specialized computations to implement more elaborate instructional approaches, such as those involving Bayesian networks (e.g., Conati, Gertner, VanLehn, and Druzdzel, 1997; Corbett, Koedinger, and Anderson, 1997). These approaches should be able to function in the SCORM tree structure, determining if users are on the right track, shaping the scope and sequence of instruction they receive, and guiding their progress. Hidden Markov Models, such as those used by Soller and Lesgold (2003) to facilitate collaboration among physically distributed participants, can also be incorporated in a similar fashion to help participants collaborate in solving problems.

SCORM Sequencing and Navigation specifications are new and await empirical validation to determine the extent to which they support these and other approaches. The question naturally arises as to how much farther SCORM Sequencing and Navigation can be pushed toward the ADL vision in which instruction consists less of predefined lessons, testing, and screening and becomes more of a conversation between the learner/user and the technology.

Empirical demonstrations to answer this question can be showcased through "Designfests," which are analogs of the current ADL/SCORM "Plugfests." The ADL initiative uses Plugfests to assess and demonstrate how well servers, objects, and authoring tools conform to SCORM specifications and, in turn, how satisfactory the specifications are in meeting users' needs. In a similar fashion, Designfests will demonstrate how and to what extent SCORM specifications can be used to implement the instructional designs intentions of developers. Designfests will help identify gaps between what developers want to do and what is practicable under SCORM Sequencing and Navigation specification. They will also set priorities for further development of SCORM specifications.

E. TOWARD MORE ADAPTIVE, INTELLIGENT LEARNING SYSTEMS

Mainstream learning systems often rely on predetermined and fixed-path delivery of content. Such systems lack agility in adapting to learners' mastery states and are thereby limited in their ability to tailor learning experiences to individual learners. As specified some time ago (e.g., Fletcher, 1975), an adaptive, "intelligent" learning system needs an accurate model of the learner, a model of the knowledge domain, and a capability that can evaluate the differences between the two. It can then identify and/or devise, on-demand and in real time, instructional strategies that produce desired instructional outcomes.

SCORM provides globally accessible records that can store the learner's degree of mastery. Included in the records are data elements that permit them to reference externally defined competencies. As the learner is sequenced through the content objects, the learning system builds up a representation of the learner's mastery and progress. Records of this sort comprise a simple, accumulative model of the learner's state.

IMS Global Learning Consortium, Inc.'s (2002) *IMS Reusable Definition of Competency or Educational Objective* adds to this capability by defining a taxonomy of competencies required to meet specific learning objectives. This taxonomy can be organized hierarchically to represent dependencies, supporting skills, or prerequisites. Each competency definition includes a text description of the competency and a unique identifier that can be referenced externally. The organization of a competency definition may represent specific skills or knowledge to be acquired for a specific task or subject domain. By referencing Competency Model identifiers, SCORM records can be used to compare the state of the learner with the generic IMS Global Learning Consortium, Inc. competencies. This capability provides a generalizable, system-based means to perform knowledge- and skills-gap analyses, which lead to the more sophisticated and adaptive strategies that use such information (Wiley, 2000).

As learning system specifications become more robust, they will also become more adaptive. Improved assessment methods and results that will continuously and unobtrusively extract information from instructional interactions and better represent the state of the learner are emerging. The strategies developed by learning systems will be informed further by learner profile information, which can "pre-load" the learner model with mastery information from outside sources, thereby reducing the need for additional testing to determine the learner's state. This process improves the capabilities of technology-based instructional systems to bypass the relevant content of already-mastered material and concentrate on relevant material yet to be learned—a process that has long been advocated by researchers (e.g., Tobias, 1989).

Basically, we seek an engineering of instruction with well-articulated principles for adjusting and modulating learning experiences. Such engineering would ensure that outcomes such as retention of skills and knowledge, application and transfer of learning, motivation to continue study, speed of response, accuracy of response, and so forth are achieved reliably by each learner to the maximum extent possible within the constraints imposed by instructional time and resources. This instructional engineering would automatically locate precisely appropriate objects and assemble them as needed for interactions with the learner. Each interaction would be tailored—on-demand and in real time—to the outcome being sought, to the learner's level of knowledge, skill, and style of learning, and to the instructional strategy indicated by instructional principles. This is a significant challenge for instructional objects, Web-based services, and the state of the art in general, but current progress suggests that technology may eventually rise to meet this challenge, yielding instruction that ensures reliable achievement of targeted instructional outcomes by all students.

1. How Might the Web and Web Services Impact This Evolution?

One way the current and near-term capabilities of learning systems can evolve is through the Semantic Web, which will provide powerful new technologies for both knowledge representation and the ontologies needed to connect them (Berners-Lee, Hendler, and Lassila, 2001). These technologies will provide ways not only to relate, but also to reason about information from widely different domains.

The Semantic Web is intended to imbue information available on the Web with sufficient meaning to improve significantly the cooperation between computers and human beings. Dealing with the semantic content of Web pages and information will improve the process of discovery needed to access relevant information and objects from the Web. Access to this semantic content will key on the development, implementation, and use of ontologies, which make it possible to identify and expose semantic linkages between highly disparate bodies of information (Chandrasekaran, Josephson, and Benjamins, 1999).

Roughly, an ontology consists of a taxonomy and a set of inference rules that formally define operations and relations among the classes defined by the taxonomy. More specifically, ontologies consist of consensual, shared, formal descriptions that identify classes of objects, each member of which possesses all qualities that all other members of the class have in common. The classes are organized in hierarchies, and classes of classes can be developed to any necessary depth. Relationships between a member of any class defined by an ontology can not only be quickly linked to many other classes and class members, but the semantic quality that forms the link can also be exposed. Ontologies identify semantic links between what may appear to be quite disparate classes and class members. Web services that identify and exploit these semantic linkages, and, in general, increase the "behavioral intelligence" of Web-based applications are being devised and implemented—as Bryson et al. (2002) have suggested.

These Web services are being built on top of existing and emerging Web standards, such as Hyper-Text Transfer Protocol (HTTP), Extensible Markup Language (XML), Universal Description, Discovery, and Integration (UDDI), and Simple Object Access Protocol (SOAP). In this way, emerging services are being made language, platform, and object model independent. They enable different applications running on different operating systems developed with different object models using different programming languages and programming environments to cooperate, communicate, and interoperate. They can express complex relationships using inference rules (e.g., those of ITSs) to perform specific tasks such as profiling learners, representing their skills, knowledge, and abilities, linking these representations to instructional objects, and managing their progress toward instructional objectives and competencies.

If successful, the Semantic Web will integrate real-world knowledge and skills acquired through simulation, education, training, performance aiding, and experience. It will provide a foundation for building more comprehensive and substantive models of subject matter domains and learners' levels of mastery than we now have and combine them with a more precise discovery of the instructional objects that learners and other users need in order to develop desired human competencies. Building on the already available functionalities of ITSs, sharable objects, and existing standards, the Semantic Web and its services will contribute substantially to the next generation of learning environments.

2. Content Object Discovery and Retrieval

Given these considerations, it is not surprising that the development of Web services used to identify and retrieve contextually relevant instructional content is becoming a major topic. The success of Google and other Web search engines has demonstrated the value and utility of content discovery and has whetted everyone's appetite for rapid, accurate search and retrieval. Presently, Google may be the single most important, effective, and widely used source of Web-based education. However, Google's location of content by text crawling, indexing, and retrieving everything that is remotely relevant to a search has limited its use as a discovery system for focused content assembly. Its operation could be improved substantially if it would cooperate with content and retrieve only what is intentionally prepared and published for discovery.

More precise identification of content objects is being addressed through the use of Uniform Resource Names (URNs) (http://www.faqs.org/rfcs/rfc1737.html), which serve as persistent, location-independent resource identifiers. The Corporation for National Research Initiatives (CNRI) has created a URN implementation called The Handle System (Kahn and Wilensky, 1995; http://www.handle.net/introduction.html). This system allows digital objects to obtain a unique identifier and link each object to its location—wherever that might be—through the use of a Handle Resolution Service (similar to domain names resolving to Internet protocol addresses through the Domain Name System). CNRI hosts a global root server that can be queried to resolve requests.

Also, the Common Indexing Protocol (CIP) (http://www.faqs.org/rfcs/rfc2651.html) allows the owner of content to create its index metadata while also allowing this indexing information to be shared among different servers, thereby enabling the development of new search and discovery services. New learning and performance-aiding specifications are emerging, and these specifications permit the identification of skills, competencies, and knowledge so that logical relations among them that are relevant to specific, but quite different communities of practices can be identified and then represented. As suggested earlier, not only will such logical relations be discovered, but the semantic nature of these relationships, insofar as they are reflected in metadata definitions, will be exposed.

These developments, among others, may produce Web services that provide accurate, precisely focused, and contextually correct discovery and retrieval of instructional objects on an easily scalable basis. Their combination of agility and accuracy enables considerable flexibility in dealing with the idiosyncratic prior knowledge elements and associations built up by individual users. They will allow instructional programs to assemble continuously and unobtrusively models of each user's state of knowledge, style of learning, and progress toward instructional objectives. These models, in turn, will support the precise tailoring of instructional interactions to each student, which is a characteristic and unique strength of one-on-one tutoring. They will provide an Aristotle for every Alexander and a Mark Hopkins for the rest of us.

F. WHERE MIGHT THESE CAPABILITIES TAKE US?

The emphasis on instructional technology brings us to revolutions in instruction. The first of these may have occurred with the development of written language about 7,000 years ago. It allowed the content of advanced ideas and teaching to transcend time and place. The second revolution in instruction began with the technology of books. Books made the content of high-quality instruction available anywhere and anytime and were also inexpensive way to reach many more people. A third revolution in instruction appears to be the introduction of computer technology. The capability of this technology for real-time adjustment of instructional content, sequence, scope, difficulty, and style to meet the needs of individuals suggests a pervasive and significant revolution in instruction. It makes the content *and* the interactions of high-quality instruction widely and inexpensively accessible—again anytime, anywhere.

Building on this possibility, ADL, SCORM, intelligent tutoring, and the Semantic Web in some combination may provide a foundation for generative education, training, and performance-aiding capabilities that are available anytime, anywhere. These developments can capitalize on the growth of electronic commerce and the World Wide Web. They can build on this worldwide, almost irresistible activity, accelerate it, and apply it to a full spectrum of education, training, and performance-aiding needs. However, to realize all this, we must also learn to combine the software engineering features offered by SCORM with the best we have to offer in the form of instructional design.

The long-term anytime, anywhere vision for ADL differs substantially from classroom learning and the many organizational structures we have in place to support it, but ADL is not at odds with classroom practice. Anytime, anywhere includes classrooms, and ADL capabilities are as accessible in classrooms as they are elsewhere. The instructional and performance-aiding, human-computer conversations that are the eventual goal of ADL will access the comprehensive spectrum of human knowledge becoming available from the World Wide Web and tailor it to the user's needs. These conversations will initially be designed to mimic those that are established by human tutors, but sooner or later this guiding metaphor must evolve and these conversations will take on forms, capabilities, and infrastructure of their own. The "Columbus Effect"[2] will take over just as it did for wireless telegraph, horseless carriages, and a host of other technological innovations that led us into territory not envisioned in the original enabling metaphor.

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2 Prognostications aside, technological approaches to instruction may provide yet another example of what might be called the Columbus Effect. As readers will recall, Columbus sailed west intending to find India (and a lucrative spice route). Instead, he (re-) discovered what became a new world for Europeans. Such a result typifies technological progress. Seeking one thing based on familiar, common practice, we inevitably end up with something else—unforeseen and unexpected. Wireless telegraph produced something functionally quite different from the telegraph—namely, the radio. Similarly, efforts to make a carriage move without a horse produced automobiles, to say nothing of gas stations, motels, and the Santa Monica Freeway. In seeking affordable, one-on-one tutoring through automation, we may end up with something no one now envisions.

At least three capabilities may evolve from the ADL teaching-learning environment:

1. **Less predefined sequencing.** An instruction (or performance-aiding) conversation will presumably take whatever direction is needed by participants in the conversation. Develop and providing a capability that allows sequences to adjust and evolve continually—perhaps a meta-sequencing capability—is a significant challenge for instructional designers. The notion of instructional design as a process of prespecifying and predefining a sequence of activities within a lesson module will need to evolve substantially if the ADL vision of a conversation sustained on an interaction-to-interaction basis is to be realized fully.
2. **More assessment and fewer tests.** Assessment will become more continuous and unobtrusive as the capability for developing a model of the learner/user from interactions evolves. Such assessment can be accomplished by taking account of the learner's vocabulary, use of technical information, level of abstraction, clustering (chunking) of concepts, inferred hypothesis formation, and so forth. These capabilities have not yet been explored and verified fully, but enough research on their application has been completed to suggest their promise for the continuous and unobtrusive assessment of user knowledge and abilities needed to tailor instruction and performance aiding to their needs. Some explicit testing and explicit probing may still be used to assess learner progress efficiently. What sort of probes are needed, how they are to be implemented, and what principles will guide their psychometric properties are other challenges for instructional designers—challenges that should not be left to evaluators and the testing community as a separate, "stove-piped" activity, but one that also integrates evaluation and instructional design.
3. **Fewer lessons and more learning.** The notion of monolithic instructional modules intended to achieve instructional objectives will also need to evolve if instruction and performance-aiding conversations are to be supported. Objectives may need to be specified more finely by more comprehensive hierarchical decomposition than those called for by current instructional design. As suggested, a capability is needed to treat instruction not as art or science, but as engineering, where specific outcomes, based on the detailed knowledge of the learner/user matched with comprehensive representations of the subject matter, can be achieved reliably by all learners—even when the targeted outcomes themselves are modified on the fly.

Other challenges may also occur to the reader. Issues of privacy and security, integration with current instructional practices, certification at a distance, and the balance between individual learning and the need for social interaction remain as topics for research, development, and implementation, but they do not seem as peculiar to the ADL vision for distributed learning as the three capabilities listed previously (see p. 19).

G. ARE THESE LEARNING ENVIRONMENTS WORTHWHILE?

Hundreds of evaluations have been performed to assess the interactive instructional capabilities incorporated in ADL. As reviewed in more detail by Fletcher (2003), the case for using these technology-mediated learning environments (based on empirical data) may be roughly summarized as follows:

- Tailoring instruction (education and training) to the needs of individual students has been found to be an instructional imperative and an economic impossibility.
- Technology can, in many cases, make this instructional imperative affordable. Under any appreciable student load, providing instruction with digital technology is less expensive than hiring a tutor for each student.
- Technology-based instruction has been found to be more effective than current classroom instructional approaches in many settings across many subject matters.
- Technology-based instruction is generally less costly than current instructional approaches, especially when many students are to be trained or when instructional objectives concern operating or maintaining costly equipment.
- Technology-based instruction has been found to decrease the time needed to reach targeted instructional objectives.

Overall, a rule of "thirds" emerges from CBI assessments. Findings suggest that use of interactive instructional technologies reduces the cost of instruction by about one-third, and it either reduces time of instruction by about one-third or it increases the amount of skills and knowledge acquired by about one-third. Similar if not enhanced results can reasonably be expected with the instructional capabilities that ADL adds to basic technology-based instruction. These results, combined with anywhere, anytime accessibility, also provided by technology-based instruction, suggest the value of achieving the ADL vision.

H. DISTANCE LEARNING AND ADL

ADL approaches contrast with less interactive, less agile, and less flexible technologies such as video teletraining, video conferencing, instructional radio, paper-based correspondence instruction, and instructional telephone, all of which have been used to provide distance learning. In general, distance-learning studies using these less interactive technologies find that they provide instruction that is about as effective as residential classroom instruction and is less preferred by students but is notably less costly. For instance, Russell (1999) identified 355 studies reporting no significant differences between distance education and other instructional approaches. His findings are confirmed by other researchers (Lockee, Burton, and Cross, 1999; Phipps and Merisotis, 1999; Bernard, Lou, and Abrami. 2003).

Bernard et al. (2004) reported a meta-analytic review of 232 studies comparing distance education with classroom instruction. Among other things, they found superior results for classroom instruction when synchronous approaches to distance education were used and superior results for distance education when asynchronous approaches were used. In a meta-analytic review of 105 empirical studies comparing Web-based learning with classroom approaches, Sitzmann et al. (2004) found Web-based instruction to be more effective for teaching declarative knowledge, but they found virtually no difference in the effectiveness of the two forms of instruction for teaching procedural knowledge. In any case, lower costs and improved accessibility suggest superior cost-effectiveness for distance education even when research finds it to be no more than equally as effective as classroom instruction.

I. FINAL WORD

Much remains to be done. The vision or view of the future presented in this document is not likely to be accomplished soon, but it seems likely to be accomplished because of our progress in such areas as electronics, computer technology, computer communications, and knowledge representation. Serious issues remain in the development of instructional strategies that reliably lead from the learner’s (or user’s) present state of knowledge, skill, and performance to one that is targeted and desired. We need a capability that is neither art nor science but, instead, is most analogous to engineering where known principles are applied to achieve specified outcomes in, if we are fortunate, a cost-effective manner.

ADLs anytime, anywhere objectives are not contrary to classroom instruction but are very different. They will require changes in the roles and responsibilities of students, instructors, and administrators. The budgeting practices and organizational structures now focused on classroom settings will also require major modifications. Like all changes, these are likely to be painful and, most certainly, difficult to achieve. The prize, however, may be worth the effort. Enabling the totality of human knowledge to be affordable and available to every individual who seeks it seems to be a worthy goal.

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GLOSSARY

ADL	Advanced Distributed Learning
AI	artificial intelligence
BASIC	Beginner's All-Purpose Symbolic Instruction Code
BIP	Binary Integer Programming
CAI	computer-assisted instruction
CBI	computer-based instruction
CIP	Common Indexing Protocol
CNRI	Corporation for National Research Initiatives
CORDRA	Content Object Repository, Discovery, and Resolution Architecture
DoD	Department of Defense
ERIC	Educational Resources Information Center
HTTP; http	Hyper-Text Transfer Protocol
IEEE	Institute of Electrical and Electronics Engineers
ITS	Intelligent Tutoring System
LMS	Learning Management System
LSAL	Learning Systems Architecture Lab
OSTP	Office of Science and Technology Policy
PSI	Personalized System of Instruction
R&D	research and development
SCO	sharable content object
SCORM	Sharable Content Object Reference Model
SOAP	Simple Object Access Protocol
UDDI	Universal Description, Discovery, and Integration
URN	Uniform Resource Name
XML	Extensible Markup Language

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13. SUPPLEMENTARY NOTES

14. ABSTRACT

The Advanced Distributed Learning (ADL) initiative was undertaken by the Department of Defense (DoD) at the request of the White House Office of Science and Technology Policy (OSTP) and in cooperation with the other Federal agencies. Its goal is to make education, training, and performance aiding accessible—anytime and anywhere. Interactions based on this level of access can be tailored to each learner's abilities, prior knowledge, interests, and preferred learning style(s). The ADL vision assumes that they will be generated in real time and on-demand to allow the free-flowing, mixed initiative give-and-take that is characteristic of true conversation. The Sharable Content Object Reference Model (SCORM) was developed to tap into the World Wide Web by specifying objects that are accessible, portable, durable, and reusable. The Content Object Repository, Discovery, and Resolution Architecture (CORDRA) is developing a system of registries that will identify and locate the precise object(s) needed for an application or an interaction within locally controlled repositories. The Semantic Web will identify and expose semantic linkages between bodies of knowledge, regardless of how disparate they are. It will enable more comprehensive and substantive models of subject matter domains and learners' levels of mastery. The functional possibilities that may arise from the ADL environment include less reliance on pre-defined lessons and more on-demand, real-time access; continuous and unobtrusive assessment of progress; and the development of education, training, and performance aiding as engineering disciplines in which all users can reliably achieve specific outcomes.

15. SUBJECT TERMS

Advanced Distributed Learning (ADL), computer-based learning, education and training, performance aiding, sharable content objects, Sharable Content Object Reference Model (SCORM), Web-based learning

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