

**Syracuse University**  
School of Education  
Instructional Design, Development and Evaluation

**IDD&E Certificate, Master of Science,  
and Doctoral Programs**

# **Student Handbook**

**(Bring this handbook with you when consulting with your advisor!)**

August 2019  
(v. 11)



Syracuse University School of Education  
[soe.syr.edu](http://soe.syr.edu)

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This handbook describes general requirements and options to be considered during completion of Certificate of Advanced Study (CAS) programs, Master of Science (MS) program, and Doctoral (PhD) program in the Instructional Design, Development and Evaluation Department at Syracuse University. Exceptions to the processes outlined within this guide must be approved by an advisor in the IDD&E faculty. These guidelines apply to **ALL** students who have matriculated into CAS, MS, and PhD programs as of August 2019. A PDF copy of this handbook is available on the IDD&E Department website.

A digital version of this handbook is available online through the [idde.syr.edu](http://idde.syr.edu) website.

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## PREFACE

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Congratulations! It is most likely that you are reading this handbook because you are exploring the IDD&E programs or have already been accepted into one of the IDD&E programs. Welcome. We hope this handbook is helpful.

*The Instructional Design, Development and Evaluation Department (IDD&E) offers a variety of programs to help students develop the competencies required to identify and evaluate learning and performance problems, to design, develop, and implement appropriate instructional solutions to these problems, and/or conduct and consume research in the instructional sciences. Students develop competencies to conduct instructional analysis, make appropriate design decisions, develop instructional materials, implement and evaluate instructional programs, and assess learning. The curriculum includes courses that blend **soft** technologies (thinking models and theories, strategic planning, IDD&E processes, interpersonal communications, and software) and **hard** technologies. Through practical projects, students learning how to design, create, implement, and evaluate non-technology and technology-supported instructional solutions for a variety of educational and professional settings. Certificates are offered in Instructional Design Foundations (12 credits), Educational Technology (15 credits), and Designing Digital Instruction (15 credits & portfolio); Master of Science and PhD degrees are offered in Instructional Design, Development and Evaluation.*

IDD&E has high expectations for all Certificate of Advanced Study, Master of Science, and doctoral students whether they decide to pursue initial training in the basics of instructional design and educational technologies through our certificate programs, Master of Science degree in Instructional Design, Development and Evaluation, or our PhD program. Our **Certificate of Advanced Study** programs provide students with basics in theory and practice. The defined certificate courses can build toward the completion of the IDD&E master degree by helping students develop core competencies. Our **Master of Science** degree consists of required core courses and the development of a professional portfolio. Our **PhD program** is intensive training designed to prepare scholars and researchers focused in the instructional sciences.

Abundant opportunities for the development and enhancement of knowledge and skills in analysis, design, development, evaluation, project management, planning, technology, and research promote successful completion of the multiple program requirements and prepare graduates for various career positions. All students are expected to excel academically, learn independently and collaboratively, demonstrate integrity, and demonstrate effective communication and cooperation within dynamic groups.

This **IDD&E Student Handbook** has been developed to assist you as you begin, continue, and conclude your program of study. The contents of this handbook reflect current requirements of the Syracuse University Graduate School, School of Education, and IDD&E programs. A suggested timeline for completion of the required tasks can be found in this guide along with explanations of, and guidelines for the required CAS, Master of Science, and PhD program requirements. Background and research interests of IDD&E faculty have also been included.

## 1. IDD&E CAS AND MS DEGREE PROGRAMS

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All applicants for graduate programs at Syracuse University must have a bachelor's degree from an accredited academic institution. The Instructional Design, Development and Evaluation Department (IDD&E) recommends that applicants have an undergraduate grade point average of 3.0 or better; however, all components (e.g., honors, references, work experience, and statements of academic goals) of the application are carefully considered during the admissions review.

IDD&E requires applicants to submit the materials described in the table below to be considered a candidate for admission. Admissions materials are required for the CAS and MS programs.

Applications **will not** be considered for admission until all of the materials below have been submitted online for review. Once an applicant has been admitted, an application for financial assistance is considered.

Degree Certification	Graduate Application	Statement of Goals	Letters of Rec.	Official Transcripts	GRE Scores	TOEFL/ IELTS* (international students)	NYS Initial Teaching Certificate
CAS (All)	YES	YES	Three Letters	YES	Not Required	YES	NO
MS IDD&E	YES	YES	Three Letters	YES	Not Required	YES	NO

- ◆ The TOEFL® / IELTS® tests evaluate students' English proficiency and is required\* for those students whose native language is one other than English.

\*TOEFL / IELTS requirement may be waived under certain circumstances. Please contact the Office Coordinator or the Department Chair for additional information.

## 2. FACULTY & ACADEMIC ADVISING

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### *Faculty Advising*

Your faculty advisor is an instructor or professor in the School of Education, and often in your program or department, assigned to you when you matriculate. They are available to assist you with academic decision-making and planning, and provide personal and professional support. For graduate students, your advisor will help you develop your program of study and discuss your program requirements (such as a portfolio or intensive exam). Faculty advisors maintain office hours and are available to meet with students on a regular basis.

As a CAS or MS student you will be assigned a Faculty Advisor when you are accepted into the program. You can contact your advisor, generally through email, to setup an appointment to discuss any concerns or progress. You may change your advisor, with permission from your current advisor at any time. Often student will change advisors to work with someone who is interested in similar practice areas.

As a PhD student, you will be assigned a *Faculty Advisor* when you are accepted into the program, a *PhD Advisor* after passing your portfolio review, and a *Dissertation Advisor* when completing your dissertation work. Your initial doctoral Faculty Advisor will advise you on your initial course work and preparation for portfolio. After passing portfolio, an IDD&E faculty member (PhD Advisor) will agree to advise you on preparation for qualifying exams and dissertation proposal. In preparation for beginning your dissertation work you will identify a dissertation advisor who will be chair of your dissertation. You must have at least **one** core IDD&E faculty member on your dissertation committee. This person does not have to be your chair. You may change your advisor, with permission from your current advisor at any time. Often student will change advisors to work with someone who is interested in similar research areas.

### *Academic Advising*

Academic advisors are professional staff in the Office of Academic and Student Services help you plan and keep track of your academic goals and get you ready for graduation. They can help you with the registration process, graduation requirements, transferring programs or credits, University and School policies and rules, and documentation. They can also help you with college life issues like family and relationships, exploring other programs at Syracuse University, and help you find and use other resources and offices on campus.

The Academic Advisor for all IDD&E Students is Sheila DeRose in the Office of Academic & Student Services:

111 Waverly Avenue, Suite 230  
Syracuse, NY 13244  
315.443.4522  
[saderose@syr.edu](mailto:saderose@syr.edu)

### 3. CAS AND MS STUDENT PROCESS CHECKLIST

Recommended Timeline for Task Completion	Component	Scheduled Date	Completed Date
Before start of the first semester	<p><b>Obtain and review</b> the School of Education (SOE) Orange Book for MS requirements and forms and CAS requirements and forms at: <a href="https://soe.syr.edu/handbook">https://soe.syr.edu/handbook</a></p> <p><b>Review</b> information on IDD&amp;E web site available at <a href="http://idde.syr.edu">idde.syr.edu</a>.</p> <p><b>Attend</b> SU and IDD&amp;E new student orientations. (Notify IDD&amp;E Office Coordinator at the end of July if you have not received orientation invitation.)</p> <p><b>Setup</b> your <b>NetID</b> and <b>Email</b>. This is associated with the Intent to Register form sent by the Graduate School. Please notify IDD&amp;E Office Coordinator the month before your start semester if you still have not received the Intent to Register form.</p> <p><b>Obtain your SU ID card</b> from Steele Hall (only for those in campus-based programs)</p>		
At IDD&E orientation	<p><b>Discuss</b> first semester course registration with your academic advisor.</p> <p><b>Schedule</b> first semester courses and complete Program of Study</p> <p><b>Register</b> for first semester courses online via MySlice</p>		
One week prior to class start date	<p><b>Log into</b> and check SU's BlackBoard Course Management System (<a href="http://blackboard.syr.edu">http://blackboard.syr.edu</a>); some courses may offer pre-work prior to the first day of class.</p>		
During first semester	<p><b>If you did not attend the IDD&amp;E New Student Orientation in August</b>, then work with your Faculty Advisor to prepare your program of study. (See <b>Appendix A</b> for all SOE/University required forms including the <i>Master's Program of Study</i> [A.1] and the <i>CAS Program of Study</i> [A.2])</p> <p><b>Attend</b> and actively participate in all your course(s). <b>ATTEND first class</b> session of the semester (the tone and introductory activities in the first class are critical to success, Faculty may drop students who are not at the first session).</p> <p><b>Prepare</b> an outline of your portfolio (only required for Master's and Designing Digital Instruction CAS students) for discussion with your Faculty Advisor</p> <ul style="list-style-type: none"> <li>• <b>Review</b> portfolio guidelines (different for MS and Designing Digital Instruction CAS)</li> <li>• <b>List</b> possible items for inclusion in your portfolio</li> <li>• <b>Check</b> by the end of your first semester to ensure that your official transcript has been received by the Graduate School.</li> </ul>		
End of each semester	<ul style="list-style-type: none"> <li>• <b>Consult</b> your Faculty Advisor, as necessary.</li> </ul>		

\*Academic semester, does *not* include summer semester

Recommended timeline for completion	Component	Scheduled Completed	
		Date	Date
<b>Beginning of subsequent semesters</b>	<p><b>Meet</b> with your Faculty Advisor or consult your program plan to:</p> <ul style="list-style-type: none"> <li>• <b>Confirm</b> remaining courses / enrollment dates</li> <li>• <b>Continue</b> building your portfolio (MS &amp; DDI students only)</li> </ul>		
<b>Academic Semester* before graduation semester</b>	<p><b>Finalize</b> a full draft of your portfolio (MS &amp; DDI students only)</p> <ul style="list-style-type: none"> <li>• <b>Verify</b> you have followed the portfolio guidelines and have developed all seven sections.</li> <li>• <b>Review</b> portfolio progress with your Faculty Advisor</li> <li>• <b>Verify</b> progress on your Program of Study</li> </ul>		
<b>Final semester</b>	<p><b>Submit</b> <i>Request for Portfolio Presentation</i> form (MS &amp; DDI students only) (See <b>Appendix A</b> for all SOE/University required forms including <i>Request for Portfolio Presentation [A.4]</i>)</p> <p><b>Finalize</b> your portfolio by confirming that all seven sections are completed (MS &amp; DDI students only)</p> <ul style="list-style-type: none"> <li>• <b>Submit</b> your portfolio link to IDD&amp;E Office Coordinator Portfolio link will be forwarded to Faculty Advisor for review. Revise and resubmit, as required</li> </ul> <p>* Submission dates will be announced via email each semester.</p> <p><b>Submit</b> Graduate Diploma Request (MySlice Applications/Student Services/Enrollment/File Diploma Request)</p> <p>* Submit by January 15<sup>th</sup> for Spring (May) or Summer (June or August) graduation Submit by September 15<sup>th</sup> for Fall (December) graduation</p> <p><b>Prepare</b> to graduate.</p> <ul style="list-style-type: none"> <li>• Visit <a href="http://commencement.syr.edu">http://commencement.syr.edu</a> for details</li> <li>• Reserve cap and gown</li> <li>• Graduate and celebrate!</li> </ul>		

\*Academic semester, does *not* include summer semester



## 4. PROGRAM OF STUDY – CAS PROGRAMS

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### *Certificate of Advanced Study (CAS) Program Choices*

The Instructional Design, Development and Evaluation (IDD&E) Program at Syracuse University offers the following CAS programs:

- **Certificate of Advanced Study, Instructional Design Foundations** (12 credits)
- **Certificate of Advanced Study, Educational Technology** (15 credits)
- **Certificate of Advanced Study, Designing Digital Instruction** (15 credits + portfolio) - fully online

The target group for these certificate programs consists of professional practitioners who have an interest in continuing professional education and who are not currently interested in an advanced degree. Certificate students will participate in key courses of relevance and interest offered as part of the standard Master of Science degree in IDD&E thus can seek to transfer credit towards that degree should they decide to continue on from the CAS to the IDD&E Master of Science degree program.

The **CAS in Instructional Design Foundations** provides interested professionals with the opportunity to advance their knowledge and skills in the area of instructional design and learning. There is a growing population of professionals in business and industry, higher education, non-profits and social services organizations, government and military, healthcare and insurance, media, and other contexts who find themselves in positions related to training and professional development, yet have little knowledge about how to design effective and efficient instruction. This certificate will provide students with a foundational knowledge of Instructional Design and help them begin developing competencies to practice. This program requires the completion of 12 credits consisting of four core courses in IDD&E.

The **CAS in Educational Technology** provides interested teachers, trainers and other professional practitioners with the opportunity to advance their knowledge and skills in the area of instructional systems, learning, and educational technologies. In many cases, professional practitioners have migrated to positions of educational technology responsibility without complete or formal preparation. This certificate program addresses most of the core competencies involved in a variety of educational technology positions, including professional trainers, training managers, instructional designers, and K-12 educators and technology coordinators. The program requires the completion of 15 credits consisting of five graduate courses offered in IDD&E.

The **CAS in Designing Digital Instruction** is a fully online program. There is a growing population of professionals in business and industry, higher education, non-profits and social services organizations, government and military, healthcare and insurance, media, and other contexts who find themselves in positions related to training and professional development, yet have little knowledge about how to design effective and efficient instruction, especially instruction that takes advantage of the affordances of digital technologies. This certificate provides professionals with the opportunity to advance their knowledge and skills in the area of instructional design and learning with digital technologies. The program requires the completion of 15 credits consisting of five courses (four core and one elective offered by IDD&E). Students are also required to create an online portfolio.

These professional certificates were designed to help those who find themselves in an instructional design or training development position and do not have the competencies to perform these positions well. Students must apply and matriculate into the certificate programs.

## ***Requirements for each CAS Program***

### **Instructional Design Foundations, CAS**

- 4 required core courses\*

### **Educational Technology, CAS**

- 5 required core courses\*

### **Designing Digital Instruction, CAS**

- 4 required core courses\*
- 1 elective course\*
- Completion of professional portfolio

\* Visit the Syracuse University Course Catalog at [coursecatalog.syr.edu](http://coursecatalog.syr.edu) for specific course requirements for each CAS program.

No substitutions will be made for the courses listed in the programs. There are no prerequisites for any of the certificate programs (except a bachelor's degree).

*Please note, that courses may only be counted twice toward graduation from Syracuse University. This means, for example, that if you complete two certificates that have shared courses and move onto a master's degree, the double-counted courses cannot be used toward your Master of Science degree OR if you complete a certificate and a master's degree with one or more courses counting toward each degree, you cannot use the double-counted courses again in a doctoral degree at Syracuse University... these examples constitute triple counting of courses, which is not allowed.*

## ***CAS Program of Study***

During your first semester, you should create a ***CAS Program of Study*** (See **Appendix A** for all SOE/University required forms including *CAS Program of Study* [A.2]). This form should be submitted by the end of your first semester. The purpose of the *CAS Program of Study* is to ensure you have planned for all the required coursework. Since every course is not offered each semester, it is your responsibility to plan for and select the schedule in which you will complete desired courses; however, you should meet with your advisor to guarantee that all coursework requirements are met and that the sequence of coursework is appropriate. Your Faculty Advisor, in consultation with you, will determine if previous courses are appropriate to replace core courses in this program.

The appropriate form for the *CAS Program of Study* must be completed by you (in consultation with your Faculty Advisor) and returned to the department Office Coordinator who will secure an official signature by your Faculty Advisor and IDD&E Chair and then submit to the Office of Academic & Student Services.

The Office of Academic & Student Services will send a copy of the *CAS Program of Study* form once fully processed for your record.

## 5. PROGRAM OF STUDY – MS PROGRAM

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During your first semester, you should create a *Master's Program of Study* (See **Appendix A** for all SOE/University required forms including *Master's Program of Study* [A.1]). This form should be submitted by the end of your first semester. The purpose of the *Master's Program of Study* is to ensure you have planned for all the required coursework. Since every course is not offered each semester, it is your responsibility to plan for and select the schedule in which you will complete desired courses; however, you should meet with your advisor to guarantee that all coursework requirements are met and that the sequence of coursework is appropriate. Your Faculty Advisor, in consultation with you, will determine if previous courses are appropriate to replace core courses in this program.

The appropriate form for the *Master's Program of Study* must be completed by you (in consultation with your Faculty Advisor) and returned to the department Office Coordinator who will secure an official signature by your Faculty Advisor and IDD&E Chair and then submit to the Office of Academic & Student Services.

The Office of Academic & Student Services will send a copy of the *Master's Program of Study* form once fully processed for your record.

Once the *Master's Program of Study* form is submitted, it may be modified, if necessary, with approval by your Faculty Advisor and submission of a *Petition to the Faculty* form (See **Appendix A** for all SOE/University required forms including *Master's Program of Study* [A.1]).

### ***Requirements for M.S. Programs (fully online or campus-based)***

The 10 required core courses were designed to develop your skills and knowledge in all of the defined instructional design competencies. These courses are aligned with the Instructional Designer professional competencies as defined and validated by the International Board for Standards for Training, Performance, and Instruction (ibstpi). See **Appendix C** for references for Instructional Design Competencies.

\* Visit the Syracuse University Course Catalog at [coursecatalog.syr.edu](http://coursecatalog.syr.edu) for specific course requirements of the MS program.

In general, a typical core course enrollment sequence starts with a 500-level course, continues through a series of 600-level and 700-level courses, and finishes with a final synthesis, capstone course. Please note: all 10 courses are offered on a set schedule; 4 fall courses, 4 spring courses, and 2 summer courses (it is possible to complete the program requirements in one calendar year).

Although there is a recommended order for taking the courses, the courses operate independently and can be taken in any order with the exception of the capstone course that should be taken at or near the end of your course work. Part-time students should plan their course sequences and schedule with their Faculty Advisor.

In addition to the required core courses, students must submit and pass a final Master's portfolio review.

*Please note, that courses may only be counted twice toward graduation from Syracuse University. This means, for example, that if you complete two certificates that have shared courses and move onto a master's degree, the double-counted courses cannot be used toward your Master of Science degree OR if you complete a certificate and a master's degree with one or more courses counting toward each degree, you cannot use the double-counted courses again in a doctoral degree at Syracuse University... these examples constitute triple counting of courses, which is not allowed.*

### ***Course Waiver and/or Substitution Request Process***

An IDD&E core course requirement may be waived or substituted for based on prior or other graduate-level courses. It is possible to substitute another course at Syracuse University or another higher education institution for an IDD&E core. The course must include similar course work and meet learning standards and experiences as defined by the IDD&E faculty member who teaches the course you are requesting be waived/substituted for. You must provide information (e.g., syllabus, examples of work completed, etc.) on the course you are requesting to be a substitute and negotiate with your Faculty Advisor and the faculty member responsible for the IDD&E core course. The Department Chair must also approve substitutions. To ensure the consistency and integrity of the program are uncompromised, **students are allowed to substitute a maximum of three courses (9 credits)** into their Master's Program.

If the Faculty Advisor and Chair feel that a waiver or substitution is appropriate, you must complete the *Petition to the Faculty* form and submit the form to the department Office Coordinator who will obtain the required signatures.

Once the *Master's Program of Study* form is submitted, a *Petition to Faculty* form must be completed by you in consultation with your academic advisor and submitted to the department Office Coordinator, if you decide to take a different course(s) than the ones listed on your original *Master's Program of Study*.

## 6. DDI CAS & MS ONLINE PORTFOLIO REQUIREMENTS

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### *Portfolio Definition and Purpose*

The portfolio is a synthesis of materials, created primarily *during* your studies in the IDD&E Master of Science degree program that showcases your development of core and specialty area competencies. Students in the CAS - Designing Digital Instruction program are also required to develop an online portfolio.

The purpose of the portfolio review is to provide one way in which to assess your growth in competencies as a result of participating in the IDD&E degree programs. Therefore, materials developed prior to enrollment in the program are typically limited to one exemplar sample as long as it has been reflected on or modified based on your learning during IDD&E courses.

The portfolio should be designed to allow faculty to assess (i) what you have learned during your enrollment in IDD&E and (ii) how you are applying your new competencies in your chosen field or domain. You must be able to state that the bulk of materials in the portfolio are a result of the knowledge and skills acquired as a result of participation in the IDD&E program.

Although the Portfolio is viewed as an assessment vehicle by IDD&E faculty, this product should be viewed by you as a placement portfolio to be shared with prospective or current employers and/or supervisors. It should demonstrate to them your competencies and accomplishments in ways that a transcript or resume alone falls short. Your portfolio is to be digital, developed and viewable online.

### *Required Portfolio Contents*

1. Portfolio Cover Page & Checklist (See **Appendix B** for all IDD&E required forms including *MS Cover Page & Checklist* [B.1] and *DDI CAS Cover Page & Checklist* [B.2]).
2. An autobiographic personal statement (post-graduate plans, career goals, personal characteristics that make you unique, etc.)
3. Current Resume/Vita
4. Course Summary (titles, descriptions, grades for all courses taken to earn your degree)
5. *Practices & Preparation*: Four to five examples of work related to your practice context.

Together, these examples should show your competencies in all phases of the instructional systems design process (ADDIE), particularly related to your area of interest (e.g., design, evaluation, interactive technologies) and context (e.g., K-12, higher education, business, healthcare, etc.). For CAS DDI these examples should focus on digital or online products.

You **must** include at least one example of the following:

1. Product or deliverable from work completed in your desired context (e.g., K-12, higher education, business, healthcare, etc.)
2. Product in your primary area of interest (e.g., design, evaluation, technology, etc.) that were developed during your studies in our program.

Examples **may** include:

- Class projects (e.g., papers, instructional media products, etc.)
- Internship and practicum documents and products

- Instructional materials you created for workshops, seminars, etc.
  - Instructional projects completed during employment for graduate assistantships or off-campus employment
- Each example **must** be accompanied by a short written project summary (**1-page**) that includes the following information:
    - Project / product title (if a course activity, for which course?)
    - Context of the project work (e.g. courses, work-related activity, etc.)
    - Author/list of contributors (If product was a result of a team effort, clearly state your role in the team and the component(s) of the product that was/were a direct result of your work.)
    - Description of which component(s) of IDD&E this product represents (e.g., needs analysis, design, evaluation, etc.)
    - A short reflection and self-assessment of the product
6. *Self-Evaluation*: A list of the *Instructional Design Competencies* **must** be included in your portfolio. You must indicate the level of competency you believe you have acquired for each competence and performance statement on the list (e.g., L-low, M-medium, H-high). Your list **must** be accompanied with:
- A **1-page** self-evaluation of your own level of competencies in the field indicating (i) which competencies you have strongly developed during your studies and experiences in the IDD&E Program, (ii) which you feel you will continue to develop, and (iii) why tracking your competencies is or is not important to your professional development. *Students in the CAS in Designing Digital Instruction* must ALSO include a self-assessment of instructor and online learner competencies as well.
7. *Practical Application*: Essay on the practical application of your MS or CAS competencies. This essay provides students an opportunity to demonstrate their ability to (i) apply what they have learned in the MS IDD&E/CAS DDI program to solve practical instructional and learning problems in their field, (ii) reflect on their learning experiences and the role that ID professionals play in the world of human performance, and (iii) define and clarify their professional identities. This piece can also serve as a work example to illustrate to current and potential employers how your ID expertise can help resolve performance problems in their contexts.

To complete the essay, please do the following:

- Create a scenario in your desired working context in which you are asked to solve a performance issue related to a gap in knowledge, skills, or attitude, e.g., a practical problem that can be resolved with an instructional solution. (See **Appendix D** and **Appendix E** for scenario guidelines and examples)
- Apply the competencies that you have learned to resolve this performance problem. You are not being asked to recall everything you have learned, rather you are being asked to apply the most important aspects of your new instructional designer competencies to the defined performance problem in your scenario.
- In the summary of your paper, describe how your knowledge gains from your courses helped you in your thinking, planning, and acting to resolve the performance problem in your scenario.
- End the essay with a short reflection on how you would define your professional identity as an IDD&E graduate and why your new competencies are important to your chosen professional context.

This essay should be no longer than **5 pages (approximately 2,500 words), 12pt font, single spaced, 1" margins**. The scenario should be no longer than ½ page of the 5 pages. Graphics

and tables can be useful. Citations for references should be in APA format. References are in addition to the 5-page limit.

### ***Portfolio Submission and Evaluation***

When you believe that your online portfolio is ready for review, contact IDD&E Office Coordinator to submit your portfolio link and the *Request for Portfolio Presentation* form (See **Appendix A** for all SOE/University required forms including the *Request for Portfolio Presentation* [A.4]). Please **do not send your portfolio link directly to your faculty advisor**, as there is additional paperwork/documentation required that the Office Coordinator must submit with the link.

Students can submit their completed portfolios as early as the semester prior to the semester they intend to graduate. Submission deadlines are typically within the month prior to the end of the semester, and due dates will be announced each semester.

The graduating students' Faculty Advisor will review their portfolio. The advisor may engage another faculty member in an additional review when there are uncertainties about the portfolio meeting the provided guidelines and quality requirements.

Each student, upon review of their portfolio, will be given a **(i) High Pass, (ii) Pass, (iii) Not Yet Pass or (iv) Fail**. To achieve a “**Pass**,” you must adequately address **all** criterion included in the guidelines. If you receive a “**Not Yet Pass**,” you will be given two weeks from the time of being informed of the results to submit a revised portfolio based on review feedback and suggestions provided. If you do not re-submit in the given time line or do not receive a “**Pass**” after your revisions, the portfolio will be scored as “**Fail**” and you will be required to sign up and resubmit the portfolio the next semester. You are permitted **one portfolio resubmission**. However, after a second *failed* attempt, you must take six additional credit hours of coursework prior to any additional attempts. Your Faculty Advisor is responsible for making the final judgment (with review from other faculty as deemed required) and reporting the review results to the IDD&E department and School of Education.

## 7. IDD&E PhD PROGRAM

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### *The IDD&E Doctoral Degree*

The Instructional Design, Development and Evaluation (IDD&E) faculty congratulate you on your admittance to a program that has been committed to training professional personnel for over 75 years. A leader in the field of instructional and educational technology, the department has been privileged with superior faculty and facilities throughout its history.

Completing this PhD is part of the process of becoming a member of the instructional design/sciences scholarly practice community. Participating in this process is about *more* than just completing courses or acquiring a few letters, ‘PhD’ to put behind your name. Pursuing this doctoral degree is an *investment in* and *commitment to* building intellect that will inform and forward our community's knowledge. It is about forming relationships within this community of practice, fully engaging with its members, and developing understanding of its history, philosophies, and growth potential. Your role is to fully engage in *course work, research,* and *membership-building* activities. We, as faculty, expect you to reflect this commitment in your academic work; portfolio; interactions with faculty, peers, and others inside and outside this community; and service inside and outside of Syracuse University.

The doctoral (PhD) program has a strong research and reflects the increasingly diverse skills and settings requiring PhD preparation. The PhD program requires 90 graduate credits, a research apprenticeship (RAP), and a dissertation. There are generally differences in the types of dissertations.

The focus of the PhD program is to prepare students for tenure-line faculty positions in research universities or research positions in other institutions. Special emphasis is given to in-depth methodological training, extensive research experience, advanced expertise in a focused area of inquiry, participation in academic and professional research communities, and the development of teaching skills. Increasingly, PhD graduates employ their research-based skills in a variety of applied professional settings in the government, K-12 education, business and industry, non-profit organizations, and the military (c.f., Clay, 2001; Golde, 1999; Golde & Dore, 2001; National Academy of Sciences, 1995; National Science Board, 1998; Nerad & Cerny, 2000).

Doctoral students may have career interest with more of a professional studies focus and their research projects can vary to help prepare them for higher-level position in professional settings. IDD&E doctoral studies will emphasize extensive experience with applied projects, providing opportunities to experience flexibility in teams on a broad range of problems, participation in applied professional communities, and the development of management and leadership skills.

IDD&E has **high expectations** for all its PhD graduates. The following quote by Lee Shulman, president of the Carnegie Foundation for the Advancement of Teaching, captures our view of the IDD&E PhD:

“...being a doctor means being a steward of one’s discipline, whether that be in industry, government, or academe.” “...a professional degree in the broad sense of professional – a degree that says someone has earned the right to profess the field” (Shulman, as quoted in Murray, 2000, p. 25).



## 8. CHECKLIST OF DOCTORAL PROCESS ACTIVITIES

Name: \_\_\_\_\_ Advisor: \_\_\_\_\_ Dissertation Advisor: \_\_\_\_\_

**Introduction/Orientation Stages:** \_\_\_ Attend IDD&E orientation \_\_\_ Attend SOE orientation

### \_\_\_ 1. Plan Study Process

- \_\_\_ 1.1 Submit **Informal Doctoral Program Plan (Appendix A [A.5])** (submit *BEFORE* portfolio review)
- \_\_\_ 1.2 Transfer credits (approved by advisor)
- \_\_\_ 1.3 Waive courses/change program plan (approved by advisor) using **Petition to Faculty** form (**Appendix A [A.3]**)

### \_\_\_ 2. Academic course work (total: 90 credits minimum, including transfer and 9 dissertation credits)

- \_\_\_ 2.1 Core (45 credits – includes ^MS courses):  
At least 3 credits in each of the following categories:  ^Technology Foundations  ^Web Technology  
 ^Learning Theory  ^Intro Inst. Design  ^Intro Inst. Development  ^Evaluation  ^Front End Analysis  
 ^Project Management  ^Adv. Inst. Design  ^International Ed. Technology  Advanced ID Lit  Literature Review  
 Designing Distance Ed.  Adoption & Change  
As well as 6 credits in:  Research Practice
- \_\_\_ 2.2 Research (30 credits): At least 3 credits in each of the following categories:  ID Depth  Survey  Inquiry  
 Dissertation Proposal  Tests & Measurements  Into to Qualitative Methods  Intro to Quantitative Methods  
As well as 6 credits in:  Adv. Qualitative Methods  Adv. Quantitative Methods
- \_\_\_ 2.3  9 Dissertation Credits (*to be taken AFTER passing qualifying exams*)
- \_\_\_ 2.4 Minimum Credits from SU:  41 credits (per School of Education and University requirements)

^Must have taken majority of MS courses **PRIOR to acceptance**

### \_\_\_ 3. Portfolio Review Process\* (Fall & Spring)

- \_\_\_ 3.1 Timeframe:  45-66 credits (minimum: 18 credits from SU, 12 credits from IDD&E, 2-3 research courses)
- \_\_\_ 3.2 Apply: Discuss with advisor and submit **Application to Submit Portfolio** form (**Appendix A [A.6]**)
- \_\_\_ 3.3 Submit Portfolio for review
- \_\_\_ 3.4 Participate in Portfolio Review with IDD&E Faculty  Pass (date: \_\_\_/\_\_\_/\_\_\_)
- \_\_\_ 3.5 Submit signed **Formal Doctoral Plan** when approved by faculty (**Appendix A [A.7]**)

\* Portfolio Review and RAP must be completed **BEFORE** taking Qualifying Exams.

### \_\_\_ 4. Research Apprenticeship Project (RAP)\*

- \_\_\_ 4.1 Acquire RAP advisor and determine project
- \_\_\_ 4.2 Submit **RAP Registration** form (**Appendix A [A.8]**)
- \_\_\_ 4.3 Conduct RAP and write publishable paper from RAP
- \_\_\_ 4.4 Submit RAP report & **RAP Advisor's Approval** form (**Appendix A [A.9]**)

### \_\_\_ 5. Doctoral Qualifying Written Exams (Quals)<sup>o</sup>

- \_\_\_ 5.1 Timeframe:  69-81 credits
- \_\_\_ 5.2 Minimal Requirements:  Passing Portfolio  RAP completed and approved by RAP advisor
- \_\_\_ 5.3 Acquire Dissertation Chairperson (first year) Chairperson: \_\_\_\_\_
- \_\_\_ 5.4 Acquire Dissertation Committee (second year) Committee Members: \_\_\_\_\_
- \_\_\_ 5.5 Submit **Application for Qualifying Exam** form (**Appendix A [A.10]**)
- \_\_\_ 5.6 Draft Prospectus (*Quals part 1, approved by IDD&E faculty*)  Pass
- \_\_\_ 5.7 Draft Dissertation Proposal - Chapters 1-3 (*approved by Dissertation Committee*)  
Required:  Chapter 1  Chapter 2  Chapter 3  Approved (date: \_\_\_/\_\_\_/\_\_\_)
- \_\_\_ 5.8 Schedule and Defend Dissertation Proposal (*Quals part 2*)  Pass (date: \_\_\_/\_\_\_/\_\_\_)
- \_\_\_ 5.9 Submit **Dissertation Proposal Cover Sheet (Appendix A [A.11])**
- \_\_\_ 5.10 File **All But Dissertation** form (**Appendix A [A.12]**)

<sup>o</sup> Students have **1 year** to complete both parts of the Qualifying Exam (Prospectus and Dissertation Proposal Defense)

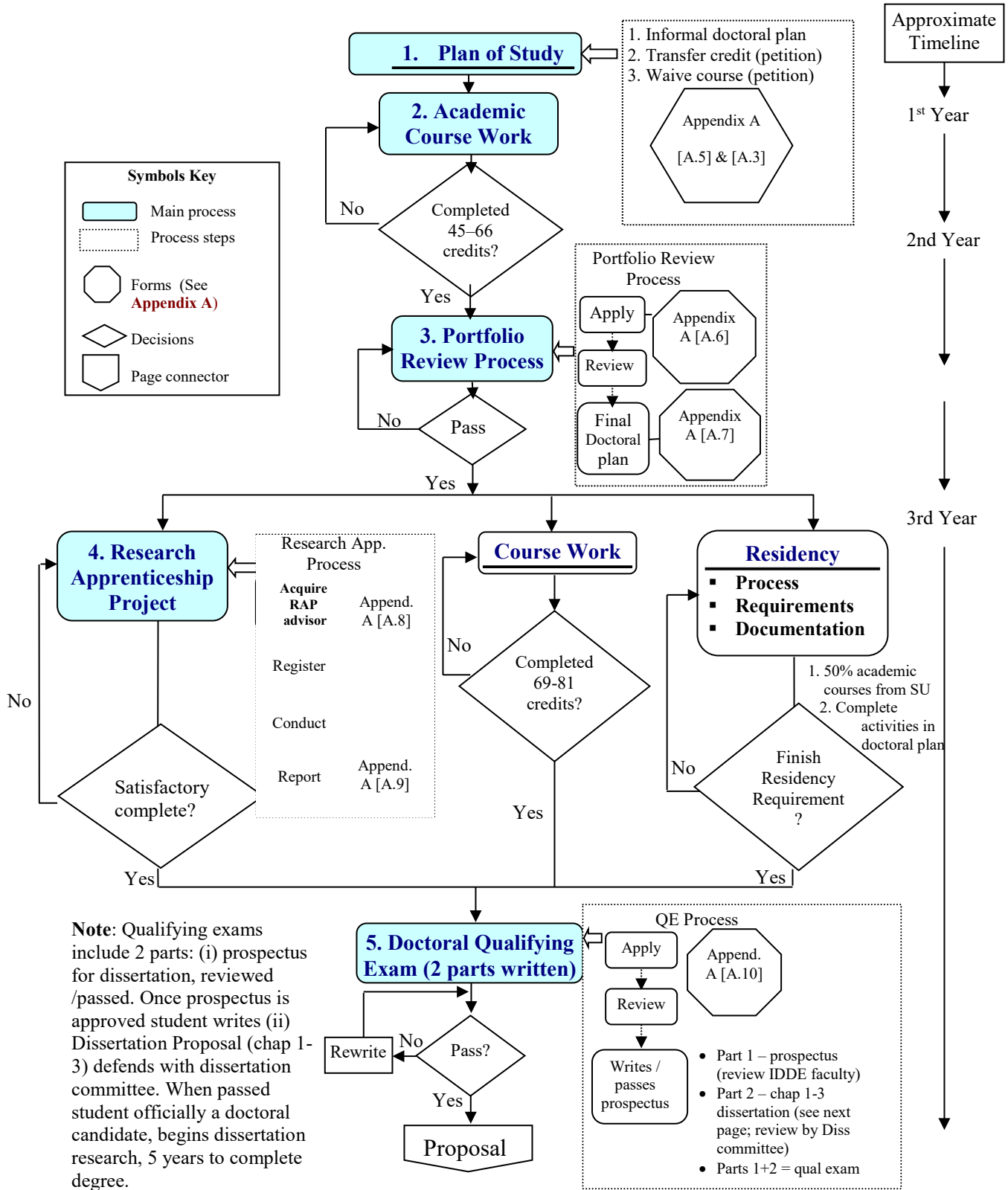
### \_\_\_ 6. Conduct & Defend Dissertation Study (*Up to 5 years after passing Qualifying Exams*)

- \_\_\_ 6.1 Conduct Dissertation research  Complete a minimum of 9 dissertation credits
- \_\_\_ 6.2 Write Dissertation research /  Gain committee approval to defend
- \_\_\_ 6.3 Submit **Intent to Defend** form the semester before defense (Appendix A [A.13])
- \_\_\_ 6.4 Submit Diploma Request in MySlice
- \_\_\_ 6.5 Submit **Request for Dissertation Examination** six weeks before defense (Appendix A [A.14])
- \_\_\_ 6.6 Defend Dissertation
- \_\_\_ 6.7 Submit Final Dissertation and required materials

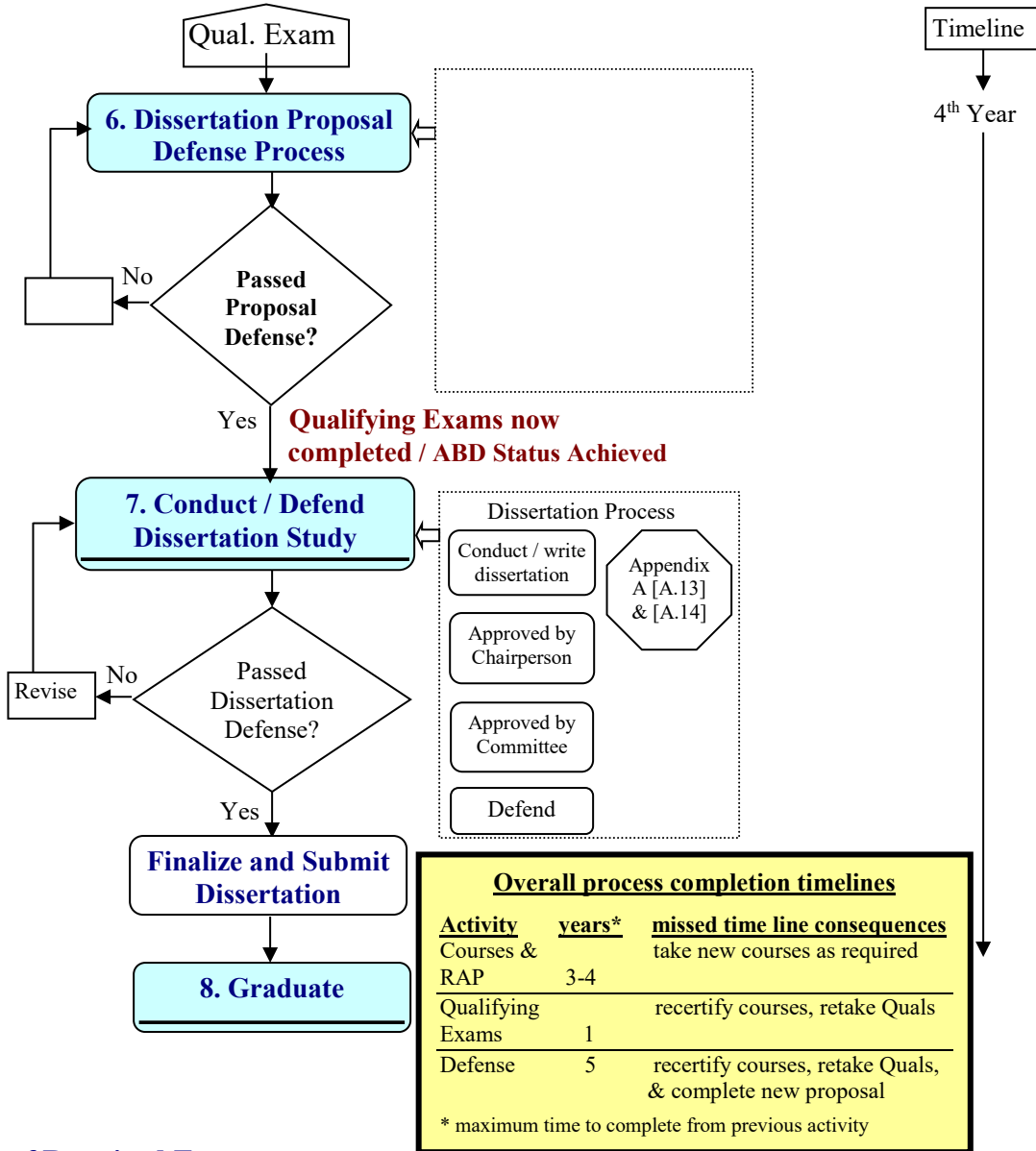
### \_\_\_ 8. Graduation (Congratulations!)

- \_\_\_ 8.1 Doctoral Dinner
- \_\_\_ 8.2 School of Education Convocation & University Commencement

# IDD&E Doctoral Degree Program Process Flow Chart



## IDD&E Doctoral Degree Program Process Flow Chart (continued)



### Summary of Required Forms

Form	Appendix A #	Timing
Informal Program of Study	A.5	First semester
Petition To The Faculty (waive/transfer/amend)	A.3	As needed
Formal Program Plan	A.7	Sign-off at portfolio
Application to Submit Portfolio	A.6	45 to 66 credits
Research Apprenticeship Project Registration form	A.8	Complete prior to Quals
RAP Advisor's Approval form	A.9	Upon RAP completion
Application to take Qualifying Exam	A.10	Completed significant coursework & RAP
Dissertation Proposal Cover Sheet	A.11	After passing quals
Intent to Defend Doctoral Dissertation Notice	A.13	Semester before defense
Request For Dissertation Examination	A.14	5-6 weeks prior to defense

## 9. PLAN OF STUDY – PhD

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### *Filing Your Informal Program of Study*

During your **first semester**, you should complete an *Informal Program of Study* form and submit it to the IDD&E Office Coordinator (See **Appendix A** for all SOE/University required forms including the *Informal Program of Study* [A.5]). The purpose of filing an informal plan so early in your doctoral career is to make sure that you have done some long-term thinking about your doctoral program before you have accumulated many course credits. Of course, this plan can and should be revised as you proceed with your studies.

In order to complete the form, you will need to initiate a meeting with your advisor to determine the details of your program. Don't wait for your advisor to initiate a meeting about your informal plan. You should initiate this meeting. Refer to the *Informal Program of Study* form in **Appendix A** [A.5] for details on the contents of this form.

## 10. PhD ACADEMIC COURSE WORK

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### *Overall Requirements*

1. **At least 90 credits** beyond the baccalaureate degree.
2. **A minimum of 45 credit hours in Major area (Core courses)** If you have a Minor area, the minimum in the minor is 33 credit hours. Your major area is selected in consultation with your advisor and may include courses drawn from related disciplines. Dissertation hours cannot be included among credit hours comprising your Major area.
3. **Your Program of Study should include EDU 781** “or an exemption (waiver) approved by the Office of Academic & Student Services – Institutions and Processes of Education” (see “EDU 781 Exemption Guidelines” below).

#### *EDU 781 Exemption Guidelines:*

- I. Students should demonstrate knowledge of different models of professional practice in education and complete the *Petition to Faculty* form (**Appendix A** [A.3]).
  - II. Students should develop their own point of view in relationship to the alternatives described in the first objective and should be able to apply their views to the analysis of problems within their own areas of expertise or in education generally.
  - III. Students should demonstrate knowledge of the cultural, historical, and professional contexts that have influenced the models referred to in the first two objects.
4. **Your Program of Study must include 9-24 hours of dissertation credit.** (Only 9 of which are counted toward the 90 required credits.) A minor area is optional. If you elect to pursue a minor, you must select at least 15 hours in your minor area *under the advisement of a faculty member at SU in the minor area. You will be required to write a Qualifying Exam in this area.*
  5. **Your Program of Study must include at least 30 credit hours** of coursework on methods of research and /or other forms of scholarly inquiry.

### *Transferring Graduate Credits*

There are limits on the number of credits you can transfer from other graduate programs. One-half of the credit hours submitted for your PhD, exclusive of dissertation credits, must be taken at Syracuse University as part of your planned doctoral program. Because total hours in a doctoral program frequently exceed the minimum 90 and because total dissertation credits are variable, the minimum credit to be taken at Syracuse University as part of the planned PhD program, exclusive of the dissertation, is set at 41 credit hours.

### *Waiving or Substituting Courses*

You may substitute a course for, or waive required courses, only through a negotiation with your advisor AND the faculty member responsible for the required course you are attempting to waive/substitute. Generally, courses may be waived/substituted if you have equivalent graduate-level training however, the credit requirements for a doctoral degree must be met and students are allowed to waive / substitute up to 9 credits in their Program of Study.

## ***Research and/or Scholarly Inquiry – Methods Requirements***

The minimal requirement of 30 research credit hours is usually met by completing a course in an introduction to quantitative methods and an introduction to qualitative methods, plus 24 additional credit hours selected to develop further expertise appropriate to your dissertation and post-doctoral work. You may select other credit sequences with the written approval of your advisor. You may take a combination of research design courses and focus in quantitative methods and statistics, or focus on qualitative methodology. However, you must take at least 2 advanced courses in both quantitative and qualitative methods.

### ***PhD Program Course Areas***

\* required pre-doctoral core; \*\* required doctoral core

#### **Introduction/Synthesis Sequence**

Web Technology\*  
Front End Analysis\*  
Advanced Instructional Design \*

#### **Learning and Cognition**

Learning Theory\*

#### **Instructional Design and Development**

Intro to Instructional Design\*  
Intro to Instructional Development\*  
Design and Development: Specialized Settings  
Motivation in Instructional Design\*  
Advanced Instructional Design \*  
Seminar in Design and Development\*\*  
Knowledge Management in Instructional Design

#### **Evaluation and Research Methods**

Techniques in Educational Evaluation\*  
Issues in Educational Evaluation  
Intro to Survey Research\*\*  
Inquiry\*\*  
Seminar in Dissertation and Research\*\*  
Literature Review\*\*

#### **Interactive Technologies and Distributed Learning**

Technology Foundations / Message Design\*  
Doctoral Research in Interactive Technologies  
Designing Distance Education\*

#### **Continuing Education and Lifelong Learning**

Adult Education  
International Educational Technologies\*

#### **Project Management and HPT**

Project Management\*  
Adoption and Change

#### **Fieldwork and Internship**

Fieldwork and Internship

#### **Independent Study and Dissertation**

Independent Study  
Dissertation Research\*\*

IDD&E doctoral students are expected to acquire both instruction and experience in the methods and conduct of research. Required and recommended experiences are described below. Each student's research preparation plan should first be defined with his / her Faculty Advisor and will then be reviewed and approved during the mid-program Portfolio Review.

Waivers, transfer courses, or substitutes are possible with appropriate approvals. The purpose of these requirements is to ensure that the student is as prepared as reasonably possible to conduct dissertation research, as well as to continue scholarly work after program completion.

## ***Required IDD&E Doctoral Courses***

### ***IDD&E Doctoral Research Core Requirement***

Minimum of 3 credits in each of the following:

Survey Research  
Dissertation Research  
Inquiry  
Tests & Measurement

### ***SOE Research Breadth Requirement***

Minimum of 3 credits in each of the following:

Introduction to Quantitative Research Methods (May substitute equivalent course)  
Introduction to Qualitative Research Methods (May substitute equivalent course)

### ***SOE Research Depth Requirement for BOTH Academic and Professional Studies***

Minimum of 6 credits in each of the following:

Advanced Qualitative Research Methods  
Advanced Quantitative Research Methods

As mentioned above there are a variety of research depth courses offered across campus. Some programs offer specific types of research methods and analysis courses, both qualitative and quantitative, that may be more appropriate (than the sequences listed above) based on your research interests. If you, and your advisor, select courses from other programs it is your responsibility to meet the prerequisite requirements and identify when and how often the courses are offered, being sure that they fit within your schedule.

### ***Dissertation Research Preparation***

While the requirements listed above provide basic preparation to do research, additional courses may be required in order to conduct specific types of dissertation studies. Examples follow, but specifics should be worked out with the advisor. For specified types of dissertation research methods, you may choose to take some additional courses based on the type of research you hope to conduct.

***For quantitative types of studies*** you may want to consider the following options (in addition to Advanced Quantitative Research Methods and Quantitative Research Design, or equivalents):

If you are doing a **survey research** dissertation you may consider:

Statistical Methods in Education and Psychology III  
Multiple Correlation and Regression  
Advanced Educational and Psychological Measurement  
Multivariate Analysis

If you are doing an **experimental / quasi-experimental** research dissertation, consider these:  
Experimental Design and Statistical Tests  
Statistical Analysis in Research Design

If you are doing a **meta-analysis** research dissertation consider:  
Meta-Analysis

***For qualitative types of studies ...*** (in addition to EDU 810 Advanced Qualitative Research Methods I and EDU 815 Advanced Qualitative Research Methods II, or equivalents)

If you are doing a **case study** research dissertation, consider these:  
Ethnographic Methods  
Historical Narratives and Interpretation

If you are doing an **ethnographic or life history** research dissertation, consider these:  
Ethnographic Methods  
Life Histories/Narratives

Visit the Syracuse University Course Catalog at [coursecatalog.syr.edu](http://coursecatalog.syr.edu) to search for these types of courses.

Utilize the ***IDD&E Doctoral Student Course Advising, Selecting, and Tracking Form*** (**Appendix B** [B.3]) to help you select courses that will support your doctoral studies. It will be wise for you to keep this document up-to-date and bring it to advising sessions.



## 11. DOCTORAL PORTFOLIO POLICIES AND GUIDELINES

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### *Preliminary Review (Portfolio) / 45 Hour Exam*

This review and/or Examination generally occurs at the end of your first year of full-time study, or upon completion of your forty-fifth hour of course work beyond a bachelor's degree.

#### **Part 1: Purpose**

The purpose of the *Portfolio* is to provide an opportunity for advanced graduate students to present a comprehensive record of themselves to the Instructional Design, Development and Evaluation faculty for critical assessment. The specific content of the portfolio, and its format, is determined by the student. The portfolio is a compilation of documents and other materials which represents the student's competence to complete doctoral course work in Instructional Design, Development and Evaluation (IDD&E). The IDD&E faculty decides whether an individual continues in the IDD&E program based on a review of the information presented in the portfolio. ***The portfolio is considered an examination.*** The portfolio examination should occur at a point no sooner than 45 hours, and no later than 54 hours into the total doctoral program of studies. The student should also have completed at least 18 credit hours of course work at Syracuse, 12 of which were in IDD&E and at least 12 credits of which are research courses. The portfolio should be compiled in consultation with the student's program advisor. See the *IDD&E Doctoral Portfolio Review* form (**Appendix B** [B.4]) for review criteria.

#### **Portfolio Components**

1. Completed *Application to Submit Portfolio* form (**Appendix A** [A.6])
2. Personal Data
  1. Write and include a brief statement of professional goals (approximately 750 words) related to IDD&E research topics.
  2. Find and include 2-3 published job descriptions that best describe the professional activities you aspire to engage immediately upon completion of your doctorate.
  3. Completed School of Education *Formal Doctoral Plan* (**Appendix A** [A.7])
    - i. Write all courses in the correct section, indicate waivers, provide copies of signed forms in portfolio
    - ii. Include a brief description of your RAP
    - iii. Include a brief description of your planned dissertation (be sure RAP and dissertation align with each other)
    - iv. Indicate your potential committee members (those who have agreed)
  4. Curriculum Vita including academic background, employment history, scholarly works, special skills, teaching activities, etc.
  5. Student copies of transcripts for the following:
    - v. Graduate courses, credits taken at Syracuse University, including hours credited toward SU doctorate.
      - ***All incompletes must be completed prior to portfolio submission, failure to do so will lead to "not yet pass."***
      - Petitions / waivers must all be submitted and approved prior to portfolio review

- vi. Graduate courses taken elsewhere, including hours credited toward Syracuse University doctorate.
- 6. Graduate Record Examination Scores; verbal, analytical and quantitative.
- 7. Work Samples with personal reflections on each works (what is it, who worked on it, what does it tell other about your focus). including:
  - i. Papers, projects, etc. that represent the quality of the student.
  - ii. Faculty evaluations and grades of course work, including professor comments on papers where appropriate.
  - iii. Personal reflections on these works
  - iv. Evidence of development in IDD&E area of specialization.
- 8. Residency Summary (See residency requirements section)
  - v. Copies of professional publications, reports, presentations with personal reflections on each works (what is it, who worked on it, what does it tell others about your focus).

## Part 2: Portfolio Examination Procedures

### 1. *Registration*

The IDD&E faculty will set the dates to review portfolios once each Fall and Spring semester. The student must files an *Application to Submit Portfolio* form (**Appendix A** [A.6]) form with the IDD&E Office Coordinator at least 45 days prior to the portfolio examination date.

### 2. *Submit Portfolio*

It is highly recommended that your portfolio be developed and presented in an electronic format with an accompanying, short, paper-based overview of key elements.

**Review your portfolio with your Faculty Advisor several weeks prior to final submission to ensure it meets all requirements!** Final submission goes to the IDD&E Office Coordinator at least two weeks in advance, who will coordinate the faculty review.

### 3. *Review*

Portfolios are submitted for review by the entire IDD&E faculty. Each IDD&E faculty member reviews the portfolio and informs the student's Faculty Advisor of their recommendation. A faculty member may request additional information from the student, in which case, the student must provide the information and have the portfolio accepted by the faculty members before being allowed to register for credits beyond 66 hours. See the *IDD&E Doctoral Portfolio Review* form (**Appendix B** [B.4]) that is completed by faculty during the review process.

The tentative result of the portfolio review will be available from the student's advisor after the group meeting of the faculty members. Students will be contacted by their advisor to discuss briefly the review prior to their meeting with the entire faculty. The focus of the meeting with the advisor is to briefly discuss faculty feedback prior to meeting with the entire faculty and to decide what action(s) should be taken as a result of the faculty decision rather than focus on the reason for the decision.

All judgments are made by faculty consensus on the scheduled portfolio examination date. A student may appeal a faculty decision by petition within two weeks of the decision. A written record of the results of each person's portfolio review will be placed in his/her permanent file by the IDD&E Chairperson. The faculty make one of four decisions:

1. **Pass:** Recommend student continue doctoral program.
2. **Conditional Pass:** Recommend specific aspects of the portfolio that must be expanded or improved before the student passes portfolio. In order to satisfy the conditions for passing the portfolio, the student must re-submit additional detail or additional information based on the advice of the faculty and in consultation with the student's program advisor. Satisfactory re-submit information can be submitted during any scheduled IDD&E faculty meeting, but no later than the next scheduled portfolio examination period.
3. **Not Yet Pass:** Recommend the student not pass portfolio at this time. Insufficient data presented to the IDD&E faculty in order to render a satisfactory recommendation. Student has the option to re-submit her or his entire portfolio during a subsequent portfolio examination period.
4. **Fail:** Terminate student's doctoral program in IDD&E. Alternatives are presented at this time. The judgment criteria in addition to that which has already been described above include: residency activities commensurate with the professional position desired, the completion of all incomplete grades, and a current grade point average of **3.25**.

### ***Description of Residency Program in IDD&E***

The development of criteria and procedures to operationalize the doctoral residency requirement would seem properly to rest on a shared understanding on the general spirit of the residency requirement. The following characterization is offered as an initial starting point for subsequent discussion.

The residency requirement is invoked in order to ensure that students spend a period of concentrated, uninterrupted work on their academic preparation. This is to be a period marked by intense attention to course work, projects, research, and active participation in academic life. Residency is a time of socialization into the values and norms of professional life. It provides an opportunity for students to acquire knowledge and to practice needed skills within a protected environment of personal supervision and support. Residency is essential to prepare students for full professional participation; it supports the development of increasing levels of professional independence and responsibility; it provides a means to complete the necessary transition from student to colleague. Doctoral students may subsequently select from among a varied array of career paths including applied or theoretical work; a mix of attention to research, teaching, development, administration, and service; affiliation with any number of disparate professional groups; and employment in such diverse settings as academia, government, business and industry, military, and public service. Regardless of the student's career path, a common core of all doctoral education is the student's intellectual and professional preparation within the academic setting. The residency requirement is designed to promote and insure the quality and intensity of that academic preparation.

The purpose of the doctoral residency is therefore to facilitate such outcomes as

- an extended **concentration** in a few areas of professional and intellectual development,
- an increased **variety** of professional and intellectual activities,
- the expansion of **professional involvement** generally,

- the development, extension, and use of **professional resources** including personal communication networks.

To accomplish these outcomes requires considerable out-of-class interaction with faculty, especially on substantive issues, considerable out-of-class interaction with fellow students on substantive issues, considerable involvement in professional activities of various kinds, such as giving presentations, attending professional conferences, helping to organize departmental events (brown bags, consortia, orientation programs), and so forth, considerable familiarity with what professional resources exist and knowledge of how to access and use them.

It is difficult to accomplish these outcomes while physically distant from the faculty, fellow students, and resources of the academic program—hence the notion that it is necessary to be “in residence” in order to accomplish these outcomes.

## 1. Evidence of Residence

One means of giving form to this general spirit of doctoral residency is to identify the indicators that could be used to establish that residency outcomes such as those listed above have been accomplished. Because of the diversity of student backgrounds and professional goals, and in keeping with the heterogeneous nature of doctoral program, it is necessary to think in terms of **classes** of indicators that would be appropriate. The residency should provide the opportunity for practice in a low-risk, safe environment and experience with a variety of professional activities in which the student shows active, self-initiated participation.

Some of the kinds of activities that a student might engage in during residency are listed on the next two pages. The residency activities selected should be clearly relevant to the student’s post-graduation career plans. Thus, the type and percentage of activities under the suggested categories will differ depending on the student’s background, academic interests, and career goals. The activities of students pursuing a PhD should not differ with respect to quantity, quality, or the other criteria identified above. Similarly, students wishing to work in an academic setting will select different types of activities from students seeking business or industry setting, but the same review criteria are equally relevant.

## 2. Sample Residency Activities

### Research, Writing, Presenting

- author/co-author a book review, concept paper, practical paper, or research article
- contribute to a professional newsletter
- conduct collaborative research with fellow students or faculty, work as a research assistant
- critique a colleague’s research article draft
- develop a grant proposal
- present a paper at state, national, and international professional conferences

### Professional Services

- serve in a graduate student organization, departmental, college, or university committee
- serve on a professional committee or in a professional elected or appointed office
- organize a professional conference or serve as chair/discussant at a professional meeting
- organize an invited speaker session or departmental new-student orientation
- organize study groups, seminars, forums, lecture series

### **Teaching**

- work as a teaching assistant, teach a course, guest lecturer in a course
- tutor fellow students, serve as a mentor for junior students
- develop course instructional materials, prepare instructional aids
- proctor an exam

### **Development, Consultation, and Project Management**

- serve as director or associate director of a project
- participate in a consultation activity, prepare a consultation report for an actual client
- develop specifications and products for instructional applications
- participate as a planner or instructional designer or evaluator on a project
- serve as a field test subject for the formative evaluation of an instructional project

### **General Professional Participation**

- serve as a research subject
- attend/participate in professional colloquia and seminars
- attend/participate in state, regional, or national professional meetings
- attend/participate in relevant professional presentations on campus (e.g., new technology demonstrations)
- host visitors to campus, observe colleagues in an innovative or exemplary program
- initiate and lead a seminar with faculty participation

Students are expected to accomplish these activities as opportunities arise out of class work; TA; GA; RA assistantships; departmental, school, and university activities; outside projects; and their own initiative. It is to the student's advantage to participate in as many of these activities as possible within the constraints of other school, occupational, family, and health considerations. It is the faculty's responsibility to provide guidance, supervision, review, and certification of the departmental residency requirement. Because these activities provide strong evidence of professional preparation and are especially useful in securing the student's post-graduation employment, the departmental residency requirement is ultimately the responsibility of the individual student.

### **3. Suggested Procedures**

If there is agreement about the spirit of the residency and the categories of appropriate evidence as discussed above, then we might proceed to the identification of procedures or mechanisms for implementing the residency requirement.

**It is required that all IDD&E doctoral students complete departmental doctoral residency requirements such as those described in the handbook.**

**Student Notification of Requirement:** The departmental residency requirement will be explained to all doctoral students during the annual fall student orientation sessions.

**Informal Plan:** As a part of the student's preparation of the informal doctoral plan, the student will prepare a statement of the type and amount of activities which the student expects to submit as evidence of completion of the departmental residency requirement. The student's academic advisor will advise, review, and approve this initial plan.

**Portfolio Review:** As a part of portfolio documentation, the student will submit a summary of all residency activities completed, in progress, and planned. Students are encouraged to identify all activities they feel meet the spirit of the requirements, not restricted to those listed

above, and to confer with other students and faculty about possibly relevant activities. It is understood that this summary may differ substantially from the expectations identified in the Informal Plan statement due to changing student interests and in response to unforeseen opportunities. The Portfolio Review summary however should include activities consistent with the spirit of the residency requirement and with the student's own career plans. If sufficient progress toward completion of the departmental residency requirement is not evident at the Portfolio Review, the student may fail or be asked to repeat portfolio.

Include a concluding section in your portfolio "Residency Summary" that indicates the faculty member who has agreed to serve as your dissertation advisor. The dissertation advisor agrees to chair, or at least serve on the student's dissertation committee. The dissertation advisor may or may not be the same individual as the student's doctoral academic advisor, and should be invited by the student to serve on the student's committee on the basis of similarity of research interests and faculty availability. **Students will not pass the Portfolio Review without a designated dissertation advisor.**

#### 4. Suggested Review Criteria

The summary statements of residency activities submitted by the student as part of the Informal plan, Portfolio Review, and Preliminary Oral should each include all residency-related activities since the student began the doctoral program (activities prior to entering the program cannot be counted as part of residence in the program). As in **Sample Residency Activities section provided above**, these activities should be listed and described under such categories as Research and Writing, Professional Service, Teaching, Development, Consultation, and Project Management, and General Professional Participation. These summary statements will be reviewed according to the following criteria:

- **Variety:** Students should engage in a diversity of activities reflecting the major aspects of the careers they are preparing for.
- **Quantity:** Since understanding and mastery require repeated practice and experience, students should engage in many activities within the major categories.
- **Quality:** An increase in the quality of the activities performed should be evident as the student progresses from incoming student to senior student to junior professional colleague.
- **Uniqueness:** The activities performed should evidence student growth and, to a considerable extent, be different from professional activities prior to joining the doctoral program, and be different from other doctoral requirements.
- **Initiative:** The summary statements should evidence the student's individual initiative in identifying, pursuing, and completing residency-related activities.
- **Collaboration:** The summary statements should evidence the student's collaboration with other students and with faculty, especially in the earlier stages of the doctoral program.
- **Independence:** The summary statements should evidence increased student independence in residency-related activities, especially as the student nears the end of the doctoral program.

The application of these review criteria requires the use of professional judgment; each student is to be considered on an individual basis within the general normative framework of all IDD&E doctoral students—there are no magic numbers or formulae.

## ***Filing Your Formal Program Plan***

In the semester after your preliminary review (portfolio review), you must file your ***Formal Program Plan*** (**Appendix A** [A.7]) with the Office of Academic & Student Services for review by the Senior Assistant Dean. Your Formal Program Plan **must be approved by your advisor before submission**. Once the program is approved, it, unlike the informal program you submitted in your first semester, must be amended with a ***Petition to Faculty*** form (**Appendix A** [A.3]) if changes need to be made. It is your responsibility to develop this plan in conjunction with your advisor.

## 12. RESEARCH APPRENTICESHIP PROJECT (RAP) GUIDELINES

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### *Research Apprenticeship Requirement*

PhD students must complete a research apprenticeship **prior** to starting *Qualifying Exams* and beginning work on the dissertation. As part of this requirement you must submit a completed research document in publishable format to the Higher Degrees Committee **before** you apply to take your Qualifying Exam.

The RAP is usually supervised by a sole faculty member, who is either the student's program advisor or another faculty member. In other cases another faculty member will serve as a sponsor. Faculty sometimes sponsor RAPS in which the student assists with the ongoing research of the professor. Faculty also sponsor RAPS in which the student develops and carries out an independent research project.

Our experience with the RAP requirement suggests that, in general, the greater benefit is derived from experience in a sponsor's ongoing project or in a student-initiated project that is closely related to the sponsor's research program. More independent projects, in which the sponsor serves more as consultant than mentor, seem best suited to students whose research skills are comparatively well-developed and already tested in practice.

The RAP should expose the student to all the typical phases of an empirical research project: framing a question or problem in a meaningfully researchable form; planning the procedures for generating relevant data; organizing, analyzing, synthesizing the data; sifting defensible conclusions from the results; relating the findings and interpretations to other bodies of conceptual and empirical work. Exposure need not involve active participation in a study from beginning to end. A student might become involved with a project, for example, after the questions have been framed and the data collected. In such a case the student would be actively involved in planning and conducting the data analyses, integrating the results, and relating them to the questions previously framed.

### *Process to Complete the RAP*

- I. Arrange Apprenticeship experience with advisor
- II. Complete *Research Apprenticeship Registration* form (**Appendix A** [A.8])
- III. Include Complete RAP Report (maximum 30 double-spaced, typed pages)

A full description and detailed procedures for the report are contained in a document prepared by the Research Committee entitled *The Research Apprenticeship*.

### *Intent of the RAP*

The Research Apprenticeship Project (RAP) is designed to bridge the developmental gap between substantive and methodological courses and the challenges posed by the PhD dissertation. The RAP requires a degree of integration and hands-on application that goes beyond the demands of separate courses. At the same time, it requires less initiative and independence than the dissertation. Often the RAP will combine active engagement in some aspects of an overall research project with more passive/vicarious involvement in the other aspects.



The RAP provides an opportunity to expand, consolidate and apply the perspectives and procedures garnered from methodological and disciplinary course work. It does this on a smaller scale and in a more protected context than the dissertation would afford. At the pre-dissertation stage of doctoral training, the RAP should provide an enriched mentoring relationship between a skilled, experienced researcher and an embryonic protégé. Within this relationship, the apprentice has a chance to complete several of the developmental tasks that would not otherwise be faced until the dissertation stage. Within the RAP it is possible for the apprentice and mentor to practice, test and refine the skills that will be needed in the dissertation as well as later in the professional career.

### ***Guidelines for Preparing Apprenticeship Reports***

There are two guiding principles to the student's involvement level. First, the student should actively participate in a significant portion of the overall research endeavor ("significant portion" is deliberately left open to good faith and careful advisory judgment.) Second, regardless of the pattern of active participation, the student should have a thorough understanding of the project as a coherent entity. The student will demonstrate this understanding in a final report of the RAP, **written by the student** (with guidance from the RAP sponsor.) The RAP report, which is submitted to the Higher Degrees Committee, should be a completed research document, in a form consistent with manuscripts submitted to professional journals in a relevant area. See in the following pages detailed "Guidelines for Preparing Apprenticeship Reports."

It is the responsibility of the student, in consultation with the advisor, to arrange the apprenticeship experience, including linkage with a RAP sponsor in cases where the program advisor will not be the sponsor. The timing of the RAP varies, but students generally undertake the RAP after completing most of their coursework in research methods. Credit hours for the RAP also vary. Some students complete the RAP within the context of a regular course (in which case the course instructor sponsors the RAP). Others contract with their sponsor for an independent study course carrying 3 to 6 hours. Still others conduct the RAP without any formal credit hours. Please see **Appendix A** [A.8] for the *Research Apprenticeship Registration* form, which is to be filed with the Higher Degrees Committee **before** the RAP commences.

### ***Approval of the RAP Report***

While final approval of a dissertation rests with a committee of advisors and independent readers, **approval of the RAP report rests entirely with the RAP sponsor.** Once it has been approved, a copy of the submission form and cover page and abstract are submitted to the Higher Degrees Committee. The *RAP Advisor Approval* form (**Appendix A** [A.9]) is to be filled out jointly by the RAP sponsor and the Student. An important element of this form is the division of labor on various phases of the overall research effort, indicating the relative student and sponsor contributions.

## ***CONSIDERATIONS OF FORMAT AND STYLE***

Most empirical disciplines have a set of conventions—partly traditional, partly arbitrary, but essentially useful for reader and writer alike—for presenting reports of scholarly inquiry. In preparing the Apprenticeship Report, consider which journals would be the most likely outlets for such research (i.e., journals dealing with similar substantive questions/topics addressed in a similar type of research.) The conventions for such a journal ought to be used for the Research Apprenticeship Report, with one additional proviso: **maximum length of 30 double-spaced typed pages**, not counting references, tables, figures or footnotes not incorporated in text.

What follow are some general guidelines for organizing the Research Apprenticeship Report. These are likely to apply to any paper (regardless of topic, research tradition, or particulars of journal style) in which the goal is clear and efficient communication.

## ***MAJOR COMPONENTS OF THE RESEARCH REPORT***

There are four typical components of a report of empirical research: (1) a statement of the study's focal point(s), along with the larger conceptual/empirical frameworks that provide a rationale for the study; (2) an account of the investigative procedures used in the study, with enough detail to permit other investigators to critique or to replicate; (3) an organized, integrated presentation of the findings of the study; and (4) a more widely ranging interpretation of those findings in relation to previous work and theoretical/clinical/policy implications.

In APA style these sections are typically called Introduction, Method, Results, and Discussion (with Results and Discussion combined in shorter articles.) Some researchers will interweave Methods and Results (this is particularly useful in certain kinds of qualitative reports.) Some will use non-APA section titles. In any case, however, the objective is the same - to convince the reader that a thoughtful, rational, logical process of inquiry has taken place.

Published reports of empirical research usually begin with an Abstract. This is a concise summary (200 to 400 words) that gives the readers a kind of “Cliff Notes” orienting background to their careful reading of the complete article. Apprenticeship Project Reports should begin with such an Abstract.

The rest of these Guidelines provide more specific suggestions for presenting the information related to Introduction, Method, Results, and Discussion. The specific suggestions also apply to reports that do not employ the common four-part structure.

## **INTRODUCTION**

- Not an exhaustive view of the literature, but rather an organized highlighting of some major themes with some specific references to major studies bearing on those themes: clinical vignettes or other anecdotes from the field may be helpful in grounding the issues.
- Should give the reader a sense of what issues have not yet been adequately addressed, but are, in the cumulative tradition of empirical research, appropriate to address at this time.

- Should conclude with the posing of the specific questions of the study, either particular hypotheses to be tested in the case of confirmatory research or open-ended topics to be covered in the case of exploratory research.
- The acid-test of an effective Introduction is whether the reader says, “Oh, of Course,” after reading the questions to be addressed by the study, instead of reacting with surprise, puzzlement, or other symptoms of conceptual whiplash.

## **METHOD & RESULTS**

- Tell the reader where the data came from: in what settings; from which subjects; by what methods of observation, interaction, instrumentation; from what archival or other nonreactive records.
- Make a case for the adequacy of the sample: in terms of “breadth-vs.-depth” of understanding; give the reader enough information to decide how far to generalize the findings beyond the setting/subjects in the study, and with how much confidence to make those generalizations.
- The procedures used to gather data should strike the reader as “face valid” means of tapping the phenomena of interest in the introductory questions: in addition, previous validating data on these procedures, if available, should be mentioned.
- Procedures of “processing” the data (qualitative or quantitative) should be appropriate to the nature of the raw data as well as to the questions being asked.
- Organization, format, presentation of the analyses (both process and outcome) should be clear and linear (i.e., proceeding from section to section in a cumulative order); the reader should have the experience of an unfolding drama or in some unfortunate cases, a comedy), not a puzzle.
- Acid-tests for the Method and Results: as the procedures are encountered, the reader should have another “Oh, of course” reaction to the relevance of the question from the introduction; after finishing Results, the reader should be able to summarize (at least descriptively, if not interpretively) the finding and, even without benefit of the Discussion, have a beginning sense of what answers can now be offered to the questions stated in the Introduction.

## **DISCUSSION**

- At first, some integration and synthesis are needed, but at this point still the discourse is closely tied to the data themselves.
- Next, more conceptual interpretation of the findings: their relationship to the questions posed; perhaps some alternative clusters of inferences to be drawn; perhaps some comment on the internally consistent/contradictory nature of the findings (either in terms of specific studies or extracted main themes, as originally presented in the Introduction.)
- Finally, the traditional “Where do we go next” section; not meant to be a speculative orgy, but rather as in the Introduction, a carefully considered discussion of what questions (a) have not yet been adequately addressed and (b) in part because of the current study, are ready for inquiry.

The guidelines described above are offered as ways of efficiently and effectively communicating research procedures and results. These guidelines should not limit the creativity of students who seek alternative means of effective communication.

## 13. DOCTORAL QUALIFYING EXAM

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The IDDE Doctoral Qualifying Exams are typically scheduled three times during the calendar year (Fall-Spring-Summer). To be eligible IDDE doctoral students must have successfully completed 69 credits of coursework, completed their RAP, passed the Doctoral Portfolio Review, and submitted their *Formal Doctoral Program Plan* (See **Appendix A** [A.7]). All courses in your doctoral plan which have incompletes or missing grades must be completed. You must discuss qualifying exams with your adviser *before* applying.

Formal registration for doctoral examinations requires completion of an *Application for Doctoral Qualifying Examination* form (**Appendix A** [A.10]). The application form must be submitted to the IDD&E Office Coordinator at least two weeks prior to the administration of the examination. The written exams must be completed within two exam periods. This consists of (i) writing and passing a dissertation prospectus [to be reviewed by IDDE faculty] and (ii) writing and defending chapters 1-3 for your dissertation [to be reviewed and passed through oral defense with your dissertation committee].

**The examination– (i) dissertation prospectus is written and defended.** You will prepare a written prospectus for your dissertation. It should be related to your Research Apprenticeship and include sections on a statement of the problem, succinct summary of key literature, and a methodology section. It is expected that the prospective will provide a short overview of your dissertation work and be approximately 20 pages plus references. It must conform to APA style. You should consult with you dissertation advisor on progress and prepare for a full IDD&E faculty review and mini defense.

**The examination– (ii) dissertation proposal is written and defended.** This part of the quals begins after passing the prospectus review. You will prepare a written proposal for your dissertation. It should be related to your Research Apprenticeship and passed prospectus. The proposal includes 3 chapters: (1) statement of the problem, (2) literature review, and (3) study methodology. It is expected that the proposal will provide a detailed overview of your dissertation work based on the RAP and prospectus. The length of proposals vary, however are generally 100 pages or less, plus references, instruments, and data collection appendices. You should consult with your dissertation committed on progress and prepare for a committee review and defense of the proposal. *Your department will report the results of your exam (after you have completed parts 1 and 2) to the Office of Academic & Student Services.*

**It is possible for a candidate to pass or fail either of these reviews.** If the prospectus review is failed twice, the advisor may recommend additional courses before the third trial. A candidate who fails the prospectus three times will not move on to the proposal stage or receive doctoral candidacy. If the student passes the prospectus but fails the proposal defense three times s/he will not receive doctoral candidacy.

***Note: Lack of making progress in the written exams may also constitute a failure. The university allows one year for students to complete both parts of the Qualifying Exams.***

## 14. DISSERTATION PREPARATION AND DEFENSE

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After passing all components of the Qualifying Examination, you must submit one signed cover sheet of your dissertation proposal to the Office of Academic & Student Services, 111 Waverly Ave, suite 230. Approval of your proposal will be in accordance with the IDD&E procedures:

- A clear statement as to the nature of the problem and why it is worthy of study
- The kind of data to obtain
- How you are going to obtain these data
- How you are going to deal with the data you've obtained
- The nature and significance of the contribution the dissertation may make to the field

When you have successfully defended and received approval of your dissertation proposals, you will have successfully completed the qualifying exams process and be considered a doctoral candidate. You will have 5 years to complete your dissertation work.

Each program area of the School of Education has developed procedures for proposal hearings appropriate to the degree sought. Since these vary from one program area to another, you should make sure that you are aware of the procedures that apply to you. What constitutes acceptable doctoral research is a question that can be addressed only with respect to specific fields of inquiry and with the guidance of scholars in those fields. It should be noted that your Dissertation Committee, working within the procedures approved by each program area, has the ultimate responsibility for approving the design and execution of the study as well as the dissertation describing it.

### *IDD&E Dissertation Agreement*

In working on a dissertation together, the faculty member serving as dissertation chairperson and the dissertation student are entering a professional relationship that will extend several months, perhaps years, into the future. Sharing expectations about this working relationship can help avoid confusion, minimize misunderstandings, and promote smooth, productive collaboration. The *IDD&E Dissertation Agreement* form is a statement of general IDD&E expectations concerning the dissertation process. Following that is space for both the faculty member and student to record any additional expectations either may have. Discussion and signature of this document can help launch a productive professional relationship. See **Appendix B** for all IDD&E required forms including the *IDD&E Dissertation Agreement* form [B.5].

### *IDD&E Program Expectations*

The IDD&E Program has certain expectations about the dissertation process, including:

**Topic.** Before a student and faculty member can reasonably agree to work together, the student is expected to have identified a clear research topic of interest. It is this topic of mutual interest that creates the basis for the working relationship. If the research topic changes substantially over time, the student has the right to find a different faculty member with whom to work. Similarly, the faculty member has the right to withdraw from the dissertation work if the topic changes dramatically. IDD&E further expects that the dissertation topic is, in some way, related both to the experience, expertise, and skills of the faculty member,

as well as to one of the major areas of educational technology, broadly considered. The dissertation must reflect a topic in IDD&E.

**Course Preparation.** Prior to substantial work on the dissertation research, the student is expected to have obtained adequate course preparation, both in terms of research methods and content-related knowledge and skills. Students must be adequately prepared to fully participate in the research, even if that means taking courses that exceed existing School of Education or IDD&E course requirements. For example, tackling a particular research problem may necessitate the student taking all the advanced courses in instructional design, or the entire sequence of qualitative methods courses. It is the faculty member's responsibility to insure that the student has adequate course preparation prior to commencing the dissertation research. Courses are typically the most efficient way to acquire the necessary background skills; students should not be expected to teach themselves the basics of research, nor should faculty be expected to tutor students because they failed to obtain prerequisite knowledge and skills.

**Experience Preparation.** In addition to course preparation, the student is expected have acquired the necessary experience with research procedures, and with the selected topic, before beginning the dissertation study. A master's thesis, the research apprenticeship or practicum, independent studies, project work, etc., are all means by which students can experience research. The dissertation may be the student's first attempt to conduct his or her own research, but it must not be his or her first research experience. Similarly, the student should have some form of prior experience with the research topic, either through prior study, work or practical experience, personal experience, etc. Minimal prior experience with the content of the research is essential if the student is to conduct feasible, meaningful, and important research on that topic.

**Language Preparation.** Dissertations are to be written in English, following the most recent APA format. All dissertation students, US and international, are expected to have a strong mastery of written English before beginning the dissertation research. If necessary, courses in English usage or composition should be completed before starting the research. Faculty are expected to read student manuscripts carefully and thoroughly, making suggestions for editorial, as well as content, revisions as necessary. Students are expected to submit well-written manuscripts, relying on outside editorial assistance if necessary. Faculty members are not expected to read poorly-written manuscripts, nor to extensively edit or re-write student work.

**Reasonable Progress.** Students are expected to work continuously, although not necessarily full-time, on their dissertation research. Acknowledging that research progress is often slow and uneven, IDD&E nevertheless expects students to make reasonable progress on their research. Once students have satisfied the 9 dissertation credit hour requirement, they are expected to register for dissertation credit each semester until they complete the dissertation research. Faculty are expected to take on only that number of students whose reasonable progress they can support. If the student does not show reasonable progress over a six month period, the faculty member has the right to withdraw from the research.

**Faculty Responsiveness.** Faculty are expected to be reasonably available, in person or by phone or email, in order to assist the student. Students should be able to expect reasonable turnaround on drafts. During the academic year, a faculty response within four weeks is reasonable, longer than a month's delay is not reasonable. Response time is likely to be slower during summer, sabbatical leave, or extended travel leaves. If chronic delays seriously impede their work, students have the right to seek another faculty advisor.

**Research Leadership.** The chairperson of the dissertation committee has the primary responsibility for directing the nature of the dissertation research. It is expected that the student and the dissertation chairperson will have prior experience working together in class, on projects, etc., to insure a compatible personal match. Committee members may make special contributions supporting the student in terms of content knowledge, research methods, study management, technical skills, or personal support. Although following the chairperson's lead, they share the responsibility of approving the dissertation research at such key points as proposal defense, study implementation, final document, and dissertation oral. The student is

expected to maintain primary contact with the chairperson. If problems arise, the student should raise them first with their dissertation chairperson, and then other members of the dissertation committee, before approaching the department chairperson or other faculty.

**Research Quality.** The dissertation chairperson, followed by the committee members, has the primary responsibility for insuring that the final quality of the dissertation research reflects well on the dissertation student, the committee, and the IDD&E program. The faculty are not to allow the dissertation process to be rushed or compromised at the expense of the quality of the work. The student has the right to expect support in producing high quality research, as well as to be fully prepared for the final dissertation oral.

## 15. CONDUCT AND DEFEND DISSERTATION

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### *Dissertation Process*

Activity	When	To whom
<b>Student</b> Files Notice of Intent to Defend Doctoral Dissertation (Dissertation Registry)	Semester before you intend to defend (see Important Filing Dates below)	Online via mysoc.syr.edu
<b>Dissertation Advisor</b> contacts Associate Dean to identify outside readers and defense date	No later than <b>5 weeks before</b> defense date, after approval by committee	Associate Dean
<b>Dissertation Advisor</b> completes Request for Dissertation Exam	No later than <b>5 weeks prior</b> to defense date	Online
<b>Student</b> provides 3 copies of dissertation	No later than <b>3 weeks before</b> defense date	Outside readers via Associate Dean (230 Huntington Hall)

The electronic *Notice of Intent to Defend Doctoral Dissertation* form (**Appendix A** [A.13]) alerts the Office of Academic Services to determine interest among the faculty in serving as a reader for your oral defense. It also alerts the Office of Academic & Student Services to review your file and prepare it for clearance to allow you to proceed with the oral defense. This form must be signed by your Dissertation Advisor to indicate that Committee feels you will be ready to defend your document.

### *Important Filing Dates*

**SEMESTER OF DEFENSE**  
 FALL  
 SPRING  
 SUMMER

**INTENT TO DEFEND MUST BE FILED BY**  
 AUGUST 15<sup>th</sup>  
 DECEMBER 15<sup>th</sup>  
 APRIL 15<sup>th</sup>

### *Request for Dissertation Examination*

When your dissertation is approved by your Dissertation Advisor and every other member of your committee, and no later than 5 weeks before your defense date, the Dissertation Advisor should contact the Associate Dean to request readers.

Your Dissertation Advisor coordinates the time and date of the oral defense with your committee members and the readers. The Dissertation Advisor then submits the electronic *Request for Dissertation Examination* form (**Appendix A** [A.14]) no later than 5 weeks prior to your chosen defense date to notify the Associate Dean

In addition to providing the members of your committee with a completed copy of your dissertation, you will also need to provide **3 completed copies** to the Administrative Assistant in



the Dean's Office, 230 Huntington Hall, **no later than 3 weeks** before your defense date to allow time for review by the readers.

The Associate Dean appoints two faculty members from outside of your program area to serve as readers of the dissertation. Readers submit written reviews 48 hours before the scheduled oral examination. One copy of the reader's review goes to the Administrative Assistant in the Office of Academic and Student Services, 111 Waverly Ave, suite 230, and one copy goes to your Dissertation Advisor who will share it with you and your whole committee. The Associate Dean will also appoint the chair of the oral examination.

You are evaluated on your dissertation and on your field of specialization by the three members of your committee and the two readers. Your dissertation is successful if the majority of the committee approves your defense. One of the affirmative votes must come from a reader. No more than one person can dissent. Usually the Graduate School representative does not vote on the oral examination.

It is not unusual for candidates to be passed with the provision that the dissertation committee supervise the corrections or additions to the final draft of the dissertation. *Corrections to the dissertation for acceptance must be completed and approved two weeks prior to your proposed graduation date or date as determined by the Graduate School.*

The Chair of the Oral Defense will notify the Graduate School of the results of the Oral Defense. However, in order to facilitate the completion of your academic records in the School of Education, contact the Office of Academic and Student Services, 111 Waverly Ave, suite 230, with the Results of the Oral Defense upon completion.

See the SOE Orange Book for additional information on this and other School of Education policies and procedures on the SOE website at:  
<https://soe.syr.edu/departments/administrative/academic-services/policies/>.

## **16. GRADUATE**

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Congratulations ... the dissertation process is complete! Well done in completing your part of your journey... now, what is next for you??

Please do plan to attend the doctoral student and faculty dinner, School of Education Convocation where you will be hooded, and the University Commencement.

## GRADUATE PROGRAM POLICIES

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### *School of Education Continuous Registration Policy*

The University has long had a requirement of continuous registration during each academic semester once a student matriculates. That is, every fall and spring semester, students must be registered for courses that are part of their programs. Students who are in between courses, or who have completed all courses and dissertation credits, but who are still working on requirements such as projects, exams, or portfolios, meet this requirement by registering for GRD 998 Degree in Progress, for “0” credit hours. Online registration of GRD 998 is accepted during regular registration periods.

Beginning Spring 2011, ***students who have registered for GRD 998 for any 4 semesters, will be charged a \$500 fee when they register for the 5th semester of GRD 998, and beyond.*** (For the first 4 semesters during the coursework phase of a graduate degree, the fee will be waived.) This fee charged upon enrollment indicates continuing engagement in a graduate program; it recognizes the continuing use of faculty, staff, and institutional resources, even during periods when courses are not being taken. It is designed to encourage students to enroll in courses on a continuous basis so that they complete their degree programs expeditiously.

During the PhD dissertation phase students are required to register for a minimum of 9 dissertation credits (EDU 999). The dissertation must be defended within five calendar years of advancement to candidacy (completion of "qualifying examination"). ***The candidate is expected to maintain continuous registration until the dissertation is successfully defended. During this five calendar year timeframe, students will be exempt from paying the \$500 fee once they have registered for total number of dissertation credits as indicated on the formal program of study. Students in this phase will register for EDU 999 for “0” credit hours. Once the five calendar year phase has lapsed, students will be required to register and pay for EDU 999 for “1” credit hour each fall and spring semester until successfully defending the dissertation.***

If circumstances are such that students have to register for GRD 998 for an extended period of time, students must take a leave of absence. A Leave of Absence permits extension of the time to complete your degree a maximum of one year. Forms for this purpose may be obtained in the Office of Academic and Student Services, 111 Waverly Ave, Suite 230.

See the SOE Orange Book for additional information on this and other School of Education policies on the SOE website at: <https://soe.syr.edu/departments/administrative/academic-services/policies/>.

### ***Student involvement in professional conferences and travel funding***

It is strongly encouraged that doctoral students participate (e.g., present, chair sessions, provide technical support, etc.) in professional local, state, national, and international conferences. You should notify faculty of your intention to present at conferences. It is also strongly recommended that you have a faculty member review your proposal submissions ***prior*** to submission. IDDE faculty have a great deal of experience in writing, reviewing, and presenting papers at conferences which may be very helpful to you in developing a successful submission. You should allow ***at least 2 weeks*** for requested faculty reviews and revisions. Remember, your participation in conferences is a reflection of the IDDE program at Syracuse University as well as a reflection on your professional training.

A limited amount of travel funds are available for IDDE doctoral students who are presenting at relevant conferences. Students who have had presentations accepted to a professional conference may request travel

funding 1 time per year, to help support their travel. ***It is highly recommended that students review their proposal with a faculty member BEFORE submitting.*** Requests for travel funding then should be made to the department head ***after*** receiving notification of acceptance of your paper and ***prior*** to the conference. Funding decisions (and level of funding) will be made based on available IDDE funds, type of presentation (e.g., concurrent session, poster session, etc.), topic of presentation (e.g., research, development, conceptual) and relevance of conference association to IDDE. Your request must include (1) information on the conference (e.g., which conference, location, and travel dates) (2) evidence of acceptance, (3) the monetary request, and (4) indications of how you intend to spend the money (e.g., airfare, housing, conference fees, etc.). Travel funding is provided to only ***one*** student for each single presentation, e.g., only one student who co-authors a paper will be funded. This process is competitive. The faculty will consider your request and notify you of the outcome prior to the conference.

**As a condition for receiving this funding you must arrange to present your paper to the IDD&E community at a brown bag, poster session, class, etc. prior to or immediately following the conference. At least one faculty member must be present.**

Note full time MS students may also apply for funding, per guidelines above, at professional practice conferences.

## **ADDITIONAL STUDENT POLICIES & INFORMATION**

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### ***SU Email Account***

All IDD&E students are **required** to use an SU email account (username@syr.edu). All IDD&E news and events, group mailings, announcements, distance education course logins, etc. will be posted only to your SU email address. Faculty will use your SU email account for course and advising communications. If you wish to use an email address provided by another institution or commercial Internet service provider, you can set up your university email account to forward to your preferred email account. It is your responsibility to check and maintain your SU email account. Notify the IDD&E Office Coordinator of your SU email account immediately. Student email accounts are available to all SU students and are usually distributed to new students prior to their arrival. If you have not set up your email account visit SU Information Technology Services [https://its.syr.edu/its\\_service\\_center/](https://its.syr.edu/its_service_center/) (live chat option available) or contact them by calling 1.315.443.2677 or emailing [help@syr.edu](mailto:help@syr.edu).

### ***Student Works Policy***

Work produced by students will be used in class for educational or research purposes. Under the federal Family Educational Rights and Privacy Act, it is understood that registration and continued enrollment in this course constitutes permission by the student for such uses. After this course is completed, any further use of student works will meet one of the following conditions: (1) the work will be rendered anonymous through the removal of all personal identification of the creator/originator(s); or (2) the creator/originator(s)' written permission will be secured.

NOTE: As a research institute in the Instructional Sciences it is likely that survey responses, project works, online discussions, etc. produced during courses may be used to inform the creation of other online, blended, or face-to-face courses and may be used for other research. The two conditions above will also be followed for research uses, either removal of personal identification or seek permission from those in this course. Students are required to note whether they will allow or disallow use of course assignments for research purposes through an initial assignment at the beginning of all courses (by end of first day of course). This assignment (online survey) requires all students to acknowledge through 3 questions that they have read, understand, and agree with all University and IDD&E Policies. The final fourth question asks all students to respond either "yes - you may use my identified assignments for research" or "no - you may not use my identified assignment" for research under the conditions mentioned above (rendered anonymous OR with written permission).

### ***Class Recording Policy – From Syracuse University Academic Integrity Policy***

Classes, advising sessions, or other types of meetings may NOT be recorded (audio or video) unless all involved have consented to the recording and the disposition of the recorded materials. You are also NOT allowed to upload or sell any recordings or materials from any courses for public consumption. Courses are the intellectual property of the course instructors and Syracuse University. Violating this policy will result in an academic integrity policy violation. For more information and the complete policy, see: <http://academicintegrity.syr.edu>.

## IDD&E FACULTY AND STAFF

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### **Moon-Heum Cho, Assistant Professor**

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PhD, University of Missouri



**E-mail:** [mhcho@syr.edu](mailto:mhcho@syr.edu)

**Office:** 263 Huntington Hall, Syracuse, NY 13244-2340

**Phone:** 315.443.3703

#### **Background and Interests:**

Dr. Cho earned his PhD in the School of Information Science & Learning Technologies at the University of Missouri-Columbia. Prior to joining Syracuse University, he was at Sungkyunkwan University, a private research university in Seoul, South Korea where he taught instructional design, technology, and program evaluation. In addition, he taught classes on technology integration in K-12, learning theories, and educational psychology to preservice teachers at Kent State University in Ohio.

He is interested in designing theory-based learning activity and transforming learning environments to enhance student learning experiences. His research focuses on understanding and supporting student engagement in challenging learning environments (e.g., online learning, project-based learning, and interdisciplinary collaborative learning) through instructional design, development, technology, and evaluation. Using diverse learning theories including social cognitive theory, constructivism, self-directed learning, epistemic beliefs, motivation, cognition, and emotion as a theoretical lens, he empirically examines, intervenes, interprets, and expands understanding about human learning in diverse contexts. His research has been published in research journals such as *Educational Technology Research & Development* (ETRD), *Internet and Higher Education*, *Interactive Learning Environments*, *Computer Assisted Language Learning* (CALL), *Educational Psychology*, and *Social Psychology of Education*. In addition, he has served on editorial boards in well-respected journals, including *Internet and Higher Education* and *Distance Education*.

For more information about Dr. Cho's research, please visit <http://itld.weebly.com>.

#### **Courses he teaches:**

IDE 641 Techniques in Educational Evaluation

IDE 700 IDE Special Topics

IDE 742 Intro to Survey Research

IDE 841 Design of Inquiry

## Tiffany A. Koszalka, Professor

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PhD, The Pennsylvania State University



**E-mail:** [takoszal@syr.edu](mailto:takoszal@syr.edu)

**Office:** 259 Huntington Hall, Syracuse, NY 13244-2340

**Phone:** 315.443.5263

### **Background and Interests:**

Dr. Koszalka began working in instructional design and technology integration in the early 1980's. She earned both a master's degree in Instructional Technology (1985) and a doctorate in Instructional Systems with a minor in Cultural Anthropology (1999).

She spent over a decade designing and managing large-scale business and industry training projects that integrated leading-edge technologies into instructional solutions. In the mid-1990's she shifted her attention to technology integration in K-12 and higher education environments. Her interests focus on the integration among instructional design, learning and technology and the factors that affect adoption of technology. These interests are driven by her curiosity about how to use technology to enhance instructional and learning environments; thus designing instruction to better support learning.

She has often serves in assessment and research roles as well as consulting on instructional design and technology integration for agencies such as NASA, NSF, NIH, DOE, private industry, and K-12 school districts. Most recently she has been collaborating with a large school system (2,000+ educators, 50,000+ students) in Thailand on instructional technology matters and teacher professional development.

Dr Koszalka has published widely, presented papers at international conferences, and serves on an international design board and editorial boards for several well respected journals. She advises doctoral and master's students and teaches graduate-level courses both in the classroom and at a distance.

### **Courses she teaches:**

- IDE 621 Principles of Instruction and Learning
- IDE 631 Instructional Design and Development I
- IDE 656 Computers as Critical Thinking Tools
- IDE 737 Advanced Instructional Design
- IDE 756 Design and Management of Distance Education
- IDE 761 Strategies in Project Management
- IDE 830 Doctoral Seminar in Design & Development
- IDE 850 Doctoral Seminar in Literature Review

**Jing Lei, Professor and Chair**  
PhD, Michigan State University

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**E-mail:** [jlei@syr.edu](mailto:jlei@syr.edu)

**Office:** 259 Huntington Hall, Syracuse, NY 13244-2340

**Phone:** 315.443.1362

**Background and Interests:**

Dr. Lei completed her PhD at Michigan State University (MSU) in the Learning, Technology, and Culture Program. She graduated from the Graduate School of Education at Peking University in China with a M.A. in Higher Education and from Henan University with a B.A. in School Education.

Dr. Lei's scholarship focuses on how information and communication technology can help prepare a new generation of citizens for a globalizing and digitizing world. Specifically, her research interests include technology integration in schools, social-cultural and psychological impact of technology, technology in informal learning settings, emerging technologies for education, and technology supported subject learning.

Her research papers appear in such journals as *Teachers College Record*, *Journal of Educational Computing Research*, *British Journal of Educational Technology*, *Journal of Computing in Teacher Education*, and *Computers and Education*. Her recent publications include *The Digital Pencil: One-to-One Computing for Children* (2008, Lawrence Erlbaum Associates publishers). Her research has been featured in influential media including *USA Today*, *US News and World Report*, and *Education Week*.

**Courses she teaches:**

- IDE 201 Integrating Technology Into Instruction I (1 credit)
- IDE 301 Integrating Technology Into Instruction II (1 credit)
- IDE 401 Integrating Technology Into Instruction III (1 credit)
- IDE 611 Technologies for Instructional Settings
- IDE 772 Educational Technology in International Settings

## ADJUNCT / AFFILIATED FACULTY

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### **Gerald S. Edmonds, Adjunct Professor, Assistant Provost Academic Programs**

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PhD, Syracuse University



**E-mail:** [gedmonds@syr.edu](mailto:gedmonds@syr.edu)

**Office:** Office of Assoc Provost - Acad Progs, 304 Steele Hall., Syracuse, NY

**Telephone:** 315.443.4119

**Background and Interests:**

Emerging technologies & qualitative methods. He serves on dissertation committees.

**Courses he teaches:**

IDE 651 Message Design for Digital Media

### **Jerry Klein, Research Professor**

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PhD, Florida State University



**E-mail:** [jwklein@syr.edu](mailto:jwklein@syr.edu)

**Background and Interests:**

Jerry Klein is a Research Professor at Syracuse University. His main experiences are in designing and developing eLearning courses for the telecommunications industry.

**Courses he teaches:**

IDE 831 Knowledge Management in Instructional Design

### **Rob Pusch, Adjunct Professor**

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PhD, Syracuse University



**E-Mail:** [rpusch@syr.edu](mailto:rpusch@syr.edu)

**Office:** Syracuse University Project Advance, 400 Ostrom Ave., Syracuse, NY

**Telephone:** (315) 443-2404

**Background and Interests:**

Dr. Pusch is an Associate Director and instructional designer for Project Advance. He is responsible for the development of online materials and courses. His research interests include computer and instructional technologies, instructional design, learning and teaching, online instruction. He serves on dissertation committees.

**Courses he teaches:**

IDE 632 Instructional Design and Development II

IDE 712 Analysis for Human Performance Technology Decisions

IDE 736 Motivation in Instructional Design



## **Alexander Romiszowski – Adjunct/Research professor**

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PhD, Loughborough University



**E-Mail:** [ajromisz@syr.edu](mailto:ajromisz@syr.edu)

**Background and Interests:**

Dr. Romiszowski's research and development interests include instructional design and distance education and their application in education. He has worked as consultant to many private and public organizations, including United Nations' projects in Spain, Italy, Hungary, and Brazil. Before coming to Syracuse, he taught instructional technology at universities in England, Brazil, and Canada. He has published extensively in the field, including the trilogy *Designing Instructional Systems*, *Producing Instructional Systems*, and *Developing Auto-Instructional Materials*.

**Courses he teaches:**

IDE 331 Measurement, Evaluation & Improvement of Human Performance  
IDE 771 Methods and Techniques for Teaching and Teaching Adults

## **Scott Shablak, Research Professor**

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Edd, Syracuse University



**E-mail:** [sshablak@syr.edu](mailto:sshablak@syr.edu)

**Office:** 270 Huntington Hall Syracuse University

**Telephone:** 315.443.1362

**Background and Interests:**

Dr. Scott Shablak, has 35 years experience in educational leadership as a teacher, school administrator, faculty member, assistant dean for professional development, and executive director of the School Study Council at Syracuse University. His areas of expertise include: professional development in educational settings; best technology and leadership practices research; program and training assessments and evaluation; and curriculum and instruction redesign.

## **Chuck Spuches, Adjunct Professor**

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Edd, Instructional Design, Development & Evaluation; Syracuse University



**E-mail:** [espuches@syr.edu](mailto:espuches@syr.edu)

**Background and Interests:**

Responsibilities and current projects include ESF Educational Outreach, including ESF in the High School; instructional quality and instructional technology efforts; and ESF's strategic planning initiative, *Daring to Dream*.

**Courses he teaches:**

IDE 764 Planned Change and Innovation

## PART-TIME INSTRUCTORS

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### Jason M. Curry, Part-time Instructor

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PhD, Southern Illinois University Carbondale



E-mail: [jmcurry@syr.edu](mailto:jmcurry@syr.edu)

**Background and Interests:**

Dr. Curry has over 15 years of professional and higher education experience in various faculty, regulatory/compliance, corporate, institutional and programmatic accreditation, distance education, instructional design and workforce education, and leadership roles.

**Courses he teaches:**

IDE 552 Digital Media Production

## IDD&E ADMINISTRATIVE STAFF

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### Rebecca Pettit, IDD&E Office Coordinator

E-mail: [rrpettit@syr.edu](mailto:rrpettit@syr.edu)

Office: 259 Huntington Hall

Phone: 315.443.3703

**Responsibilities:** Rebecca can help with all operation of IDD&E and should be consulted on all administrative matters from admissions through graduation ... and everything in between!

## IDD&E HISTORY OF EXCELLENCE – EMERITI / RETIRED FACULTY

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### **Philip Doughty, Executive Director, Training Systems Institute, Emeritus (retired)**

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PhD, Florida State University



E-mail: [pldought@syr.edu](mailto:pldought@syr.edu)

**Background and Interests:** Phil Doughty filled the role of IDD&E senior citizen with three decades of experiences in the program. Each of those thirty years he has directed and collaborated on an average of six research, development, evaluation, and front-end planning projects. These projects, some internal to SU and others involving local schools and organizations, national government agencies and corporations as well as international organizations, have provided opportunities to try out new interventions, practice what the field (and IDD&E) professes, and other practical experience to master's and doctoral students. The projects also have served as case examples in Phil's graduate courses, which focus primarily on front-end analysis, instructional development.

### **Nick L. Smith, Emeritus Professor (retired)**

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PhD, University of Illinois



E-mail: [nlsmith@syr.edu](mailto:nlsmith@syr.edu)

**Background and Interests:**

With training in psychology and social science research methodology, Nick L. Smith, has conducted numerous evaluation and applied field research studies in such areas as community change, teacher education, special education, and medical education. For several years, he directed a research and development effort to create alternative methods for evaluators in local school districts and state departments of education. Nick's primary interest in the methodology of inquiry is reflected in the courses he teaches in evaluation methods and theory, sample survey methods, and research and dissertation design. His more recent research and writing are on topics in evaluation theory and practice, and inquiry design.

### **Donald P. Ely, Emeritus Professor (retired/deceased)**

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Founding Director of the ERIC Clearinghouse on Information and Technology; PhD, SU



**Background and Interests:** Instructional Design, Development and Evaluation, and Founding Director, ERIC Clearinghouse on Information and Technology, Syracuse University; Visiting Professor of Instructional Systems, Florida State University; Adjunct Professor, Faculty of Educational Science and Technology, University of Twente (The Netherlands). He studied conditions that facilitate the implementation of educational technology innovations; cross-cultural transfer of media; history and philosophy of the field of educational technology; trends in educational technology.

## **Roger Hiemstra, Emeritus Professor (retired)**

PhD University of Michigan



**E-mail:** [rogerhiemstra@gmail.com](mailto:rogerhiemstra@gmail.com)

**Field/Interests:** Dr. Hiemstra is the past president of the Commission of Professors of Adult Education and former editor of *Lifelong Learning: The Adult Years* and *Adult Education Quarterly*. Dr. Hiemstra has focused much of his scholarship on the identification of teaching implications and resources related to adults and self-directed learning and is the author of numerous articles and book chapters. He is also the co-author of several books, including *Overcoming Resistance to Self-Direction in Adult Learning*; *Professional Writing: Processes Strategies and Tips for Publishing in Educational Journals*; *Creating Effective Learning Environments*; *Self-Direction in Adult Learning*; and *Individualizing Instruction*.

## **David Tiedemann - Director, Faculty Computing and Media Services (retired)**

EdD, Educational Leadership, University of San Diego



**E-mail:** [tiedeman@syr.edu](mailto:tiedeman@syr.edu)

**Office:** Faculty Computing and Media Services, 164 Newhouse II, Syracuse, NY

**Telephone:** (315) 443-1814

**Background and Interests:**

David teaches continuing education and graduate courses on videoconferencing. Recent publications include: "An Overview of Distance Learning Development and Delivery Applications," "Designing a Digital Learning Center & the Art of Compromise" (with R. Dow and M. Legaspi), "Bridging Miles and Instructional Paradigms: A Videoconferencing Course Team-Taught by Instructors 325 Miles Apart" (with C. Bragg); and a "Video Distribution Systems". He is active in various professional associations in governance and editorial capacities, including: AECT; Consortium of College and University Media Centers; Directors of Educational Technology in California Higher Education; and the Western Cooperative for Educational Telecommunications.

## **Barbara Yonai – Director, Office of Institutional Research and Assessment (retired)**

PhD, Syracuse University



**E-mail:** [bayonai@syr.edu](mailto:bayonai@syr.edu)

**Background and Interests:**

After eight years of teaching in the public schools as a special educator, Dr. Yonai came to Syracuse University to complete her doctorate with an emphasis in evaluation. She worked as an evaluator at the Center for Support of Teaching and Learning for several years and is interested in course and program evaluation. Dr. Yonai has provided workshops on instructional development, formative evaluation, test construction, and assessment for both higher education and public school faculty.

## APPENDICES

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<b>Appendix</b>	<b>Description</b>
Appendix A	SOE/University Required Forms <ul style="list-style-type: none"><li>A.1 Petition to Faculty</li><li>A.2 Master's Program of Study</li><li>A.3 Petition to Faculty</li><li>A.4 Request for CAS/MS Portfolio Presentation</li><li>A.5 Informal Doctoral Program Plan</li><li>A.6 Application to Submit Doctoral Portfolio</li><li>A.7 Formal Doctoral Program Plan</li><li>A.8 RAP Registration</li><li>A.9 RAP Advisor Approval Form</li><li>A.10 Application for Qualifying Exams</li><li>A.11 Dissertation Proposal Cover Sheet</li><li>A.12 All But Dissertation (ABD)</li><li>A.13 Intent to Defend (electronic)</li><li>A.14 Request for Dissertation Exam (electronic)</li></ul>
Appendix B	IDD&E Required Forms <ul style="list-style-type: none"><li>B.1 MS Cover Page &amp; Checklist</li><li>B.2 DDI CAS Cover Page &amp; Checklist</li><li>B.3 IDD&amp;E Doctoral Course Advising Tracker</li><li>B.4 IDD&amp;E Doctoral Portfolio Review</li><li>B.5 IDD&amp;E Dissertation Agreement</li></ul>
Appendix C	Ibstpi Instructional Designer Competencies References
Appendix D	Guidelines For Creating and Evaluating the Master's Portfolio Scenario Requirement
Appendix E	Master's Portfolio Example Scenarios for Section 7 of the Portfolio



### A.3 Petition to Faculty

**SYRACUSE UNIVERSITY  
PETITION TO FACULTY**

Print Form

**DIRECTIONS:** Complete the petition and obtain the required signatures as indicated below.

Name \_\_\_\_\_ SUID# \_\_\_\_\_  
Mailing Address \_\_\_\_\_  
Email \_\_\_\_\_ Phone \_\_\_\_\_  
College/School \_\_\_\_\_ Select one:  Fr.  So.  Jr.  Sr.  Grad  
Semester (select one):  Fall  Spring  Summer Year \_\_\_\_\_

I RESPECTFULLY PETITION TO:

TO THE STUDENT: Obtain the required signatures in the order given:

Student \_\_\_\_\_ Date \_\_\_\_\_  
Advisor \_\_\_\_\_ Date \_\_\_\_\_  
Professor \_\_\_\_\_ Date \_\_\_\_\_  
Department Chairperson \_\_\_\_\_ Date \_\_\_\_\_  
College/School Undergraduate or Graduate \_\_\_\_\_ Date \_\_\_\_\_  
Office \_\_\_\_\_ Date \_\_\_\_\_  
Registrar \_\_\_\_\_ Date Recorded \_\_\_\_\_

**Download From:** School of Education Office of Academic & Student Services  
<https://soe.syr.edu/forms>

**Timeline:** As needed

**Required Signatures:** Student, Faculty Advisor, Professor (if applicable), Department Chair, Assistant Dean ACS

**Questions?** Contact the IDD&E Office Coordinator or your Faculty Advisor for assistance with this form.

### A.4 Request for Portfolio Presentation

**Syracuse University - School of Education  
Request form for Master Exam,  
Portfolio Presentation and/or Thesis**

Please complete this form one semester prior to your anticipated Master Exam, Portfolio Presentation, and/or Thesis and return it to the Office of Academic and Student Services at 111 Waverly Ave, Suite 230 so that necessary paperwork can be sent to your faculty advisor. The Master Exam, Portfolio and/or Thesis is a final requirement for many Master Degree programs and must be completed prior to your anticipated graduation date. If you have any questions please see your faculty advisor for details and exam dates.

What semester do you plan to complete your exam, portfolio and/or thesis?  
Fall  Spring

When do you expect to graduate?  
Fall  Spring

Name: \_\_\_\_\_  
SUID: \_\_\_\_\_  
Local address: \_\_\_\_\_  
Student phone: \_\_\_\_\_  
Student e-mail: \_\_\_\_\_  
Program name: \_\_\_\_\_  
Faculty advisor: \_\_\_\_\_

Please make a copy of this form for your records and return it to the Office of Academic and Student Services located at 111 Waverly Ave, suite 230.

**Download From:** School of Education Office of Academic & Student Services  
<https://soe.syr.edu/forms>

**\*\*CAS DDI students:** Please be sure to indicate your program clearly on the form **OR** contact IDD&E Office Coordinator for a modified version

**Timeline:** Submit with completed portfolio link

**Required Signatures:** N/A

**Questions?** Contact the IDD&E Office Coordinator for assistance with this form.

## A.5 Informal Doctoral Program Plan

**Syracuse University - School of Education  
Informal Doctoral Program Plan**

Name: \_\_\_\_\_ SUID: \_\_\_\_\_  
 Program of Study: \_\_\_\_\_ Check One  Ed.D  Ph.D  
 Mailing Address: \_\_\_\_\_  
 Phone: \_\_\_\_\_ E-mail: \_\_\_\_\_

1. What is your purpose in pursuing the Ph.D or Ed.D degree? Why have you chosen this degree in preference to the other? (Attach written response) \_\_\_\_\_
2. How many SU credit hours do you intend to take? \_\_\_\_\_
3. How many, if any, credits do you intend to transfer from another institution? \_\_\_\_\_
4. When do you anticipate taking EDU 781? \_\_\_\_\_
5. How and when will you fulfill your research requirements? \_\_\_\_\_
6. When will you do your preliminary review? \_\_\_\_\_
7. When will you do your research apprenticeship or practicum field experience requirements? \_\_\_\_\_
8. When will you take your qualifying exams? \_\_\_\_\_
9. How many credits do you intend to use for your dissertation (9-24)? \_\_\_\_\_
10. How many credits do you intend to have in your total program? \_\_\_\_\_

Student's signature \_\_\_\_\_ Date \_\_\_\_\_  
 Advisor's signature \_\_\_\_\_ Date \_\_\_\_\_  
 Dean's signature \_\_\_\_\_ Date \_\_\_\_\_

Note: File this Informal Program Plan with 270 Huntington Hall, Office of Academic and Student Services. A copy will be provided to you and your advisor.


**Download From:** School of Education  
Office of Academic & Student Services  
<https://soe.syr.edu/forms>

**Timeline:** Before the end of the first semester of study

**Required Signatures:** Student, Faculty Advisor, Assistant Dean ACS

**Questions?** Contact the IDD&E Office Coordinator or your Faculty Advisor for assistance with this form.

## A.6 Application to Submit Portfolio (Preliminary Examination)



INSTRUCTIONAL DESIGN, DEVELOPMENT AND EVALUATION

APPLICATION TO TAKE PRELIMINARY EXAM

I \_\_\_\_\_ (student's name) intend to submit a portfolio for the preliminary examination by \_\_\_\_\_ (date).

\_\_\_\_\_  
(Advisor's Signature)

**Obtain from:** IDD&E Office Coordinator

**Timeline:** Between 45-66 credits of coursework completed

**Required Signatures:** Student, Faculty Advisor

**Questions?** Contact the IDD&E Office Coordinator or your Faculty Advisor for assistance with this form.





## A.8 Research Apprenticeship (RAP) Registration

Syracuse University- School of Education  
Research Apprenticeship Registration Form

Name \_\_\_\_\_ SUID \_\_\_\_\_

Program Area \_\_\_\_\_ Program Advisor \_\_\_\_\_

Apprenticeship Advisor \_\_\_\_\_ Beginning Date \_\_\_\_\_

Brief description of apprenticeship \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

Anticipated completion date \_\_\_\_\_

Description of student's role in apprenticeship \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

Description of apprenticeship advisor's role \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

Possible topics for article based on apprenticeship experience \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

If article is submitted for publication, authorship will be listed as follows: \_\_\_\_\_  
 \_\_\_\_\_

**APPROVED BY:**

Apprenticeship advisor's signature \_\_\_\_\_ Date \_\_\_\_\_

Program advisor's signature \_\_\_\_\_ Date \_\_\_\_\_

Student's signature \_\_\_\_\_ Date \_\_\_\_\_

**Download From:** School of Education  
Office of Academic & Student Services  
<https://soe.syr.edu/forms>

**Timeline:** Complete after successful Portfolio Review and before Qualifying Exams

**Required Signatures:** Student, Faculty Advisor, Apprenticeship Advisor

**Questions?** Contact the IDD&E Office Coordinator, your RAP Advisor, or your Faculty Advisor for assistance with this form.

## A.9 Research Apprenticeship (RAP) Advisor Approval

Syracuse University - School of Education  
Research Apprenticeship Advisor's Approval Form

Name \_\_\_\_\_ SU ID # \_\_\_\_\_

Please Check one of the following boxes below:

An IRB was required for my Research Apprenticeship. Therefore an approval letter is attached to this document

An IRB was not required for my research Apprenticeship.

---

*This student has successfully completed the research apprenticeship:*

\_\_\_\_\_  
(Advisor's signature/approval) \_\_\_\_\_ (Date)

Please indicate the relative contribution of you and the student to each of the following phases of research. The student is being asked this question, and we would like to have your perceptions of the process. You may need to modify these descriptions to fit your research paradigm.

	Primarily Advisor	About Even	Primarily Student
Initial articulation of project	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Identification of key constructs, concepts, issues	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Operationalization of research questions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Planning strategies for data collection	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Implementation of data collection	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Planning of analysis procedure	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Conducting analysis	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Interpretation of findings	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

- How many hours of student contact time did you devote to this student's apprenticeship?  
\_\_\_\_\_
- How much additional time did you spend to critique and review work in progress?  
\_\_\_\_\_
- Please write a short statement about the role of the research apprenticeship in the development of this student as a researcher.  
\_\_\_\_\_

**Download From:** School of Education  
Office of Academic & Student Services  
<https://soe.syr.edu/forms>

**Timeline:** Upon successful completion of RAP and before Qualifying Exams

**Required Signatures:** Apprenticeship Advisor

**Questions?** Contact the IDD&E Office Coordinator or your RAP Advisor for assistance with this form.

## A.10 Application to Take Qualifying Exams

Syracuse University - School of Education  
Application for C.A.S. or Doctoral Qualifying Examination  
Return to Suite 230, 111 Waverly Avenue

Program of Study:  C.A.S.  Ed.D.  Ph.D.

Name: \_\_\_\_\_ SUID: \_\_\_\_\_  
 Program of Study: \_\_\_\_\_ Faculty Advisor: \_\_\_\_\_  
 Mailing Address: \_\_\_\_\_  
 Phone: \_\_\_\_\_ E-mail: \_\_\_\_\_

Examination Date(s): \_\_\_\_\_  
 PROGRAM AREA: \_\_\_\_\_  
 (6 half-days; or with minor, 4 half-days) (C.A.S. - 2 half-days)

Student's signature \_\_\_\_\_ Date \_\_\_\_\_

**TO BE COMPLETED BY ADVISOR:**

	Date
The Applicant has been approved for candidacy	
Program of Study filed	
Apprenticeship Report/ Practicum Report filed	

Faculty advisor signature \_\_\_\_\_ Date \_\_\_\_\_  
 Minor advisor signature (if applicable) \_\_\_\_\_ Date \_\_\_\_\_

**Download From:** School of Education  
Office of Academic & Student Services  
<https://soe.syr.edu/forms>

**Timeline:** After significant coursework and RAP have been completed

**Required Signatures:** Student, Faculty Advisor

**Questions?** Contact the IDD&E Office Coordinator or your Faculty Advisor for assistance with this form.

## A.11 Dissertation Proposal Cover Sheet

Syracuse University - School of Education  
 Dissertation Proposal Sample

TITLE OF DISSERTATION PROPOSAL

By  
 Author's Name  
 B.A. ABC College, 2000  
 M.S. EFG University, 2002

Submitted in partial fulfillment of the requirement for the degree of Doctor of Philosophy (PhD) in (Area of Study) in the Graduate School of Syracuse University.

OR

Submitted in partial fulfillment of the requirements for the degree of Doctor of Education (EdD) in (Area of Study) in the School of Education of Syracuse University.

DATE \_\_\_\_\_  
 (Month and Year)

Dissertation Committee: \_\_\_\_\_

Name, Chairperson (typed name and signature)  
 \_\_\_\_\_

Name, Committee Member (typed name and signature)  
 \_\_\_\_\_

Name, Committee Member (signature above and typed name below)  
 \_\_\_\_\_

Final submission of your dissertation:

One complete copy submitted on a CD of the approved version of your dissertation, along with its abstract, signed by your advisor, must be submitted to Graduate Enrollment Management Center, 303 Bowne Hall, prior to the final day of the graduation period. The abstract must not exceed 350 words. Consult with the Office of Academic and Student Services of the Graduate Enrollment Management Center for semester deadlines. See **PhD Orange Book** for details.

**Obtain From:** The sample Proposal Cover Sheet can be obtained from IDD&E Office Coordinator

**Timeline:** After Qualifying Exams (part 1 and part 2) have been successfully completed

**Required Signatures:** Dissertation Chairperson and Committee Members

**Questions?** Contact the IDD&E Office Coordinator, your Dissertation Advisor, or your Dissertation Chairperson for assistance with this form.

## A.12 All But Dissertation (ABD) Status

Syracuse University - School of Education  
ABD Status Form

Name: \_\_\_\_\_ SUID: \_\_\_\_\_  
Program of Study: \_\_\_\_\_ Faculty Advisor: \_\_\_\_\_  
Mailing Address: \_\_\_\_\_  
Phone: \_\_\_\_\_ E-mail: \_\_\_\_\_

This is to certify that this student has officially attained the status of ABD by virtue of having completed the following departmental requirements:

Has an approved formal plan with a minimum of 90 credits  
 Has completed all coursework with exception of dissertation credits, as outlined on formal plan  
 Approval for Research Apprenticeship is submitted.  
 Has successfully passed the qualifying exam for PhD program (attached)

DATE ATTAINED ABD STATUS IN THIS PROGRAM: \_\_\_\_\_

---

To the student: Please obtain the required signatures in the order given and submitted to the Office of Academic and Student Services – 111 Waverly Ave, Suite 230

Student \_\_\_\_\_ Date \_\_\_\_\_  
Faculty Advisor \_\_\_\_\_ Date \_\_\_\_\_  
Dept Chair \_\_\_\_\_ Date \_\_\_\_\_  
Home College Dean \_\_\_\_\_ Date \_\_\_\_\_

**Download From:** School of Education  
Office of Academic & Student Services  
<https://soe.syr.edu/forms>

**Timeline:** After Qualifying Exams (part 1 and part 2) have been successfully completed

**Required Signatures:** Student, Faculty Advisor, Department Chair, Assistant Dean ACS

**Questions?** Contact the IDD&E Office Coordinator or your Faculty Advisor for assistance with this form.

## A.13 Intent to Defend Dissertation Notice (online form)

Upon dissertation committee approval, the candidate registers dissertation in the School of Education Dissertation Registry the semester before the defense:

- Log in to <http://my.soe.syr.edu/>
- Access Dissertation Registry
- Enter dissertation information online.

**Timeline:** Semester before defense

**Questions?** Contact the IDD&E Office Coordinator or your Faculty Advisor for assistance with this form.

## A.14 Request for Dissertation Examination (online form)

**Request for Examination**

After you submit this form you will receive an email with a pdf attachment of your Request for Exam. You MUST print out the pdf and have it signed by your advisor and academic unit chair before your request will be processed. If you have any questions about the form please call 315.443.4266 or email [degreet1@nyu.edu](mailto:degreet1@nyu.edu).  
Return signed copy to: The Graduate School, 207 Bowne Hall, at least 3 weeks prior to defense date.

\* = Required Field

First Name \*  Degree \*  Email Address \*

Last Name \*  Program \*  SUID \*

Gender \*

Thesis/Dissertation Title \*

Examination Date \*  Examination Time \*  Examination Place \*

**Oral Defense Committee**

Oral Exam Chair \*  Oral Chair Email Address \*

Committee Member 1 \*  Committee Member 1 Email Address \*

Committee Member 2 \*  Committee Member 2 Email Address \*

Committee Member 3  Committee Member 3 Email Address

Committee Member 4  Committee Member 4 Email Address

Committee Member 5 (if applicable)  Committee Member 5 Email Address

The undersigned hereby recommend that the Graduate School approve the above committee to examine the candidate's thesis/dissertation and to conduct the final oral examination.

Advisor \*  Advisor Email Address \*

Advisor Signature

Academic Unit Chair \*  Academic Unit Chair Email Address \*

Academic Unit Chair Signature

When the committee approves the dissertation for defense, a date has been identified for the defense, and the outside Oral Exam committee has been established by the School of Education, the program administrator or dissertation chair will complete the request for examination.

The doctoral candidate should be aware of, and participate in, this process and help in planning activities.

**Timeline:** Semester before defense

**Questions?** Contact the IDD&E Office Coordinator or your Dissertation Advisor with questions.

# APPENDIX B. IDD&E REQUIRED FORMS

## B.1 MS Portfolio Cover Page & Checklist

**M.S. IDD&E Portfolio Cover Page & Checklist**

Overall Portfolio Rating:  High Pass  Pass  Not Yet Pass  Fail  
 Student Name: \_\_\_\_\_ Advisor: \_\_\_\_\_ Date: \_\_\_\_\_

1. Portfolio Cover Page & Checklist  Yes  No  
 2. Course Summary (titles, descriptions, grades)  Yes  No  
 3. Resume/Vita  Yes  No  
 4. An autobiographic personal statement (post-graduate plans career goals, personal characteristics that make you unique, etc.):  Yes  No

Please rate Section 4 (Personal Statement) on a 1-5 scale (1=poor, 3=good, 5=excellent)  1  2  3  4  5

5. Practice & Preparation (four to five examples of work); write brief comments below:

Component	Examples	#1	#2	#3	#4	#5
i. Project / product title						
ii. Content of the project work						
iii. Author list of contributors						
iv. Description of which phase(s) of IDD&E this product represents						
v. A short reflection and self-assessment of the product						

Please rate Section 5 (Practice & Preparation) on a 1-5 scale (1=poor, 3=good, 5=excellent)  1  2  3  4  5

6. Self-Evaluation; write brief comments below:

a. Self-evaluation of list of competencies  Yes  No  
 b. A 1-page overall self-evaluation  Yes  No

Please rate Section 6 (Self-Evaluation) on a 1-5 scale (1=poor, 3=good, 5=excellent)  1  2  3  4  5

7. Practical Application; write brief comments below:

a. Scenario including context description  Yes  No  
 b. Performance issues clearly defined (related to instructional solution)  Yes  No  
 c. Propose instructional and other performance solutions clearly defined  Yes  No  
 d. Application of Instructional Design, Development and Evaluation principles in practice  Yes  No  
 e. Reflections on your professional identity and importance of your new competencies  Yes  No

Please rate Section 7 (Practical Application) on a 1-5 scale (1=poor, 3=good, 5=excellent)  1  2  3  4  5

Overall Comments: \_\_\_\_\_

**Obtain from:** IDD&E Office Coordinator

**Timeline:** To be included in your online portfolio (please note: comment and section rating sections are for Faculty use only)

**Required Signatures:** N/A

**Questions?** Contact the IDD&E Office Coordinator or your Faculty Advisor with questions.

## B.2 DDI CAS Portfolio Cover Page & Checklist

**CAS Designing Digital Instruction Portfolio Cover Page & Checklist**

Overall Portfolio Rating:  High Pass  Pass  Not Yet Pass  Fail  
 Student Name: \_\_\_\_\_ Advisor: \_\_\_\_\_ Date: \_\_\_\_\_

1. Portfolio Cover Page & Checklist  Yes  No  
 2. Course Summary (titles, descriptions, grades)  Yes  No  
 3. Resume/Vita  Yes  No  
 4. An autobiographic personal statement (post-graduate plans career goals, personal characteristics that make you unique, etc.):  Yes  No

5. Practice & Preparation (4-5 examples of work focused on digital online products); write brief comments below:

Component	Examples	#1	#2	#3	#4	#5
i. Project / product title						
ii. Content of the project work						
iii. Author list of contributors						
iv. Description of which phase(s) of IDD&E this product represents						
v. A short reflection and self-assessment of the product						

Please rate Section 5 (Practice & Preparation) on a 1-5 scale (1=poor, 3=good, 5=excellent)  1  2  3  4  5

6. Self-Evaluation; write brief comments below:

a. Self-evaluation of ID competencies  Yes  No  
 b. Self-evaluation of instructor competencies  Yes  No  
 c. Self-evaluation of Online Learner competencies  Yes  No  
 d. A 1-page overall self-evaluation  Yes  No

Please rate Section 6 (Self-Evaluation) on a 1-5 scale (1=poor, 3=good, 5=excellent)  1  2  3  4  5

7. Practical Application; write brief comments below:

a. Scenario including context description  Yes  No  
 b. Performance issues clearly defined (related to instructional solution)  Yes  No  
 c. Propose instructional and other performance solutions clearly defined  Yes  No  
 d. Application of Instructional Design, Development and Evaluation principles in practice  Yes  No  
 e. Reflections on your professional identity and importance of your new competencies  Yes  No

Overall Comments: \_\_\_\_\_

**Obtain from:** IDD&E Office Coordinator

**Timeline:** To be included in your online portfolio (please note: comment and section rating sections are for Faculty use only)

**Required Signatures:** N/A

**Questions?** Contact the IDD&E Office Coordinator or your Faculty Advisor with questions.

## B.3 IDD&E Doctoral Student Course Advising, Selecting, and Tracking form

Obtain from: IDD&E Office Coordinator

### IDD&E Doctoral Student Course Advising, Selecting, and Tracking Form

**REQUIRED PRE-DOCTORAL COURSES: (from IDD&E MS program or equivalent)**  
 Minimum of 30 credits of foundational IDD&E coursework:

<input type="checkbox"/> Technology Foundations	3 credits
<input type="checkbox"/> Web Technology	3 credits
<input type="checkbox"/> Introduction to Learning Theory	3 credits
<input type="checkbox"/> Introduction to Design	3 credits
<input type="checkbox"/> Introduction to Development	3 credits
<input type="checkbox"/> Educational Evaluation	3 credits
<input type="checkbox"/> Project Management	3 credits
<input type="checkbox"/> Introduction to Front End Analysis	3 credits
<input type="checkbox"/> International Perspective	3 credits
<input type="checkbox"/> Advanced ID /Application in Applied Practice/ Capstone	3 credits
<b>Total</b>	<b>30 credits</b>

**REQUIRED DOCTORAL CONTENT DEPTH COURSES:**  
 Minimum of 6 depth course experiences including IDD&E doctoral seminars & electives:

<input type="checkbox"/> Seminar in Design and Development	3 credits
<input type="checkbox"/> Seminar in Conducting Literature Reviews	3 credits
<input type="checkbox"/> IDE Depth Elective	3 credits
<input type="checkbox"/> IDE Depth Elective	3 credits
<input type="checkbox"/> IDE Research Depth Elective	3 credits
<input type="checkbox"/> IDE Research Depth Elective	3 credits
<b>Total</b>	<b>18 credits</b>

**REQUIRED DOCTORAL RESEARCH COURSES:**  
 Minimum of 10 research courses:

<input type="checkbox"/> Inquiry & Research Design	3 credits
<input type="checkbox"/> Seminar in Dissertation Research	3 credits
<input type="checkbox"/> Survey Research	3 credits
<input type="checkbox"/> Tests and Measurements (or equivalent)	3 credits
<input type="checkbox"/> Intro to Quantitative Methods (or equivalent)	3 credits
<input type="checkbox"/> Intro to Qualitative Methods (or equivalent)	3 credits
<input type="checkbox"/> Advanced Quantitative Methods (or equivalent)	3 credits
<input type="checkbox"/> Advanced Quantitative Methods (or equivalent)	3 credits
<input type="checkbox"/> Advanced Qualitative Methods (or equivalent)	3 credits
<input type="checkbox"/> Advanced Qualitative Methods (or equivalent)	3 credits
<input type="checkbox"/> Dissertation Research Preparation	3 credits
<input type="checkbox"/> Dissertation Research Preparation	3 credits
<b>Total</b>	<b>30 credits</b>

**REQUIRED DOCTORAL DISSERTATION: (9 required credits)**  
 Dissertation **Total 9 credits**

**FOUNDATION DOCTORAL COURSE:**  
 1 SOE core course (or substitute with a depth choice; must be discussed with advisor);  
 EDU 781 (OR additional IDE depth course) **Total 1 credit**

**Required Total credits (beyond Bachelor's) = 90 credits (30 MS; 60 Doctoral credits)**

This form will help you select courses that will support your doctoral studies. It will be wise for you to keep this document up-to-date and bring it to advising sessions.

**Timeline:** To be used as needed when planning your coursework. It is suggested to bring this to all advising sessions.

**Required Signatures:** N/A

**Questions?** Contact the IDD&E Office Coordinator or your Faculty Advisor with questions.

## B.4 IDD&E Doctoral Portfolio Review form

Obtain from: IDD&E Office Coordinator

### IDD&E Doctoral Portfolio Review Form

Student: \_\_\_\_\_ Date: \_\_\_\_\_ Page 1 of 2

Reviewer: \_\_\_\_\_

Review decision:  Pass  Not Yet Pass  Fail

If the decision is a not-yet-pass, indicate actions required of student and:

Develop a new portfolio and resubmit to the full committee

Review by the full committee of requested revisions

Complete specified items and review with faculty advisor.

Recommendations to the student: (courses, activities, etc.)

\_\_\_\_\_

Current advisor: \_\_\_\_\_ Dissertation advisor: \_\_\_\_\_

Specific portfolio items:

IDD&E Doctoral Core\* Requirements: (check or mark with W for waiver submitted)

\*\* choice of other IDE 800/700 level courses for depth

<input type="checkbox"/> Technology Foundations / Message Design	<input type="checkbox"/> Evaluation	Required for admission (see SOE degree requirements)
<input type="checkbox"/> Web Technology	<input type="checkbox"/> Intro to Front End Analysis	
<input type="checkbox"/> Learning Theory	<input type="checkbox"/> Project Management	
<input type="checkbox"/> Intro to Design	<input type="checkbox"/> Advanced Instructional Design (capstone)	
<input type="checkbox"/> Intro to Development	<input type="checkbox"/> International Perspective	
<input type="checkbox"/> Seminar in Design/Develop**	<input type="checkbox"/> Seminar in Conducting Literature Reviews*	
<input type="checkbox"/> IDE	<input type="checkbox"/> IDE	

IDD&E Required Research Core Requirements: (check or mark with W for waiver submitted)

<input type="checkbox"/> Intro to Survey Research	<input type="checkbox"/> Intro to Qualitative Research Methods	Research depth courses (9 credits)
<input type="checkbox"/> Inquiry & Research Design*	<input type="checkbox"/> Intro to Quantitative Research Methods	
<input type="checkbox"/> Seminar in Dissertation Research*	<input type="checkbox"/> Tests & Measurements	
<input type="checkbox"/> Advanced Quantitative Methods	<input type="checkbox"/> Advanced Qualitative Methods	
<input type="checkbox"/> Advanced Quantitative Methods	<input type="checkbox"/> Advanced Qualitative Methods	
<input type="checkbox"/> Advanced Quantitative Methods	<input type="checkbox"/> Advanced Qualitative Methods	

Recommended IDD&E Dissertation Specialty Research or depth courses: (based on dissertation)

Course #	Course Title	Date

School of Education Requirements:  EDU 781 (check of mark with W for waiver submitted)

Informal Doctoral Plan:  (signed and filed with Academic Affairs)

Formal Doctoral Plan:  (unsigned - to be signed by PhD advisor)

**Timeline:** To be used by Faculty when reviewing IDD&E Doctoral Portfolios (Preliminary Examinations)

**Required Signatures:** N/A

**Questions?** Contact the IDD&E Office Coordinator or your Faculty Advisor with questions.

## IDD&E Doctoral Portfolio Review Form (continued)

IDD&E Doctoral Portfolio Review Form Page 2 of 2

Area(s) of specialization/concentration:  prepared  insufficient prep

Evidence of Functional Residency:  sufficient activities  insufficient activities

Research Apprenticeship Plans:  Complete  Estimated complete date: \_\_\_\_\_

Advisor:

Topic / focus:

Relationship to Dissertation:

Dissertation Plans:

Topic:

Suggested Committee:

\_\_\_\_\_  evidence of commitment

\_\_\_\_\_  evidence of commitment

\_\_\_\_\_  evidence of commitment



Personal Statement  included

Note: There should be a clear relationship among personal statement, positions sought, and preparation/focus:

Resume  included

Sample positions sought:  included

## B.5 IDD&E Dissertation Agreement

### IDD&E Dissertation Agreement Form

FACULTY MEMBER EXPECTATIONS: As a dissertation chairperson, I have the following expectations for this dissertation work together (e.g., I will not support a final dissertation oral defense during a holiday or the summer break):

- 1.
- 2.
- 3.

STUDENT EXPECTATIONS: As a dissertation student, I have the following expectations for this dissertation work together (e.g., I would expect to be able to contact you by phone or email at least once every two weeks.):

- 1.
- 2.
- 3.

AGREEMENT: We have discussed both the IDD&E and our own expectations for the dissertation process, and agree to work together, to the extent possible, within these shared expectations.

Dissertation Student \_\_\_\_\_ Date: \_\_\_\_\_

Dissertation Chairperson \_\_\_\_\_ Date: \_\_\_\_\_

**Obtain from:** IDD&E Office Coordinator

**Timeline:** To be completed once Dissertation Advisor has been agreed upon

**Required Signatures:** N/A

**Questions?** Contact the IDD&E Office Coordinator or your Faculty Advisor with questions.



## **APPENDIX C. IBSTPI COMPETENCIES REFERENCES**

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### **IDD&E Core Course Competencies: Instructional Designer Competencies**

The Instructional Designer Competencies and Performance Standards are those identified and validated by the International Board of Standards for Training, Performance, and Instruction (IBSTPI) from the text:

**Koszalka, T., Russ-Eft, D., & Reiser, R. (2013). *Instructional Designer Competencies: The Standards (fourth edition)*. Charlotte, NC: Informational Age Publishing.**

Students will purchase the Instructional Designer Competencies books and will be provided with a table of the competencies and performance statements in IDE 631 Instructional Design and Development I. During IDE 631 students will review the competencies and use the provided template to identify a baseline level of competence in the standards. Throughout the entire MS program students should continue to evaluate their progress in developing these competencies. At the completion of course work students will complete a final self-evaluation, using the table from IDE 631, and include it in their portfolio with an overall narrative summary of their progress in mastering the competencies of an instructional designer.

## **APPENDIX D. GUIDELINES FOR CREATING/EVALUATING PORTFOLIO SCENARIOS (SECTION 7)**

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See noted text in the **three sample scenarios** provided in the next few pages of the handbook (underlined with numbered subscripts associated with the points below) as well as the Portfolio Requirements Checklist, Section 7 – Practical Application, Section 7 of your portfolio. This section of your portfolio represents a synthesis and application of your thoughts, experiences, learning, development, and reflections from participating in the IDD&E programs. It should represent a synthesis of your knowledge, skills, and attitudes toward practice in *your* context of work. This section will be rigorously reviewed based on the following:

### **Scenario**

1. Indicates a position title related to IDD&E/CAS (instructional designer, program evaluator, e-learning specialist, curriculum specialist, ed tech specialist, etc.); indicates key responsibilities as related to instructional design field (e.g., instructional design, instructional development, learning /instructional facilitation, program evaluation, learning assessment, e-learning / web design for instruction and learning, teachers, ed tech specialist, etc.)
2. Describes working context (k12, higher ed, business and industry, consulting, non-profit, etc.) and its need for employees with IDD&E competencies.
3. Describes a current work responsibilities or tasks as they relate to IDD&E/CAS context - - gaps in knowledge, skills, or attitudes; identification of issues discovered that are *not* related to knowledge, skills, or attitudes; identification of gaps can be resolved through applications of instructional design, development and / or evaluation competencies

### **Performance issues clearly defined; Propose instructional and other performance solutions; Application of IDD&E principles in practice**

4. Describes a specific problem being addressed that may be resolved from an instructional design, development, and / or evaluation intervention or approach -- designed and implemented to close a knowledge, skill, or attitude gap; includes a brief description of the approach taken --based in instructional design, development, and / or evaluation foundations; provides evidence in the description of a credible application of the instructional sciences --training and instruction is *NOT* a credible application for a problem based in poor working conditions or incentive problems, for example.

### **Reflections on your professional identity and importance of your new competencies**

5. Four to five instructional designer, instructor, training manager, or evaluator competencies are described (and cited from ibstpi or other credible references such as AECT, ISTE, ASTD, ISPI, or AEA) in terms of how well the student feels they have developed these competencies and why they are the most important competencies to be applied to this case scenario.
6. Specific descriptions of how these competencies can help to resolve the problem(s) presented in the scenario. There should be a clearly stated relationship between the problems / tasks and these competencies.
7. Reflections on strengths and weaknesses in terms of the student's competencies and required work tasks and the contributions that the student feels s/he will be able to make to the field, either in their work place or beyond to the larger community of practitioners.

## APPENDIX E. EXAMPLE PORTFOLIO PRACTICAL APPLICATION SCENARIOS (SECTION 7)

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These are examples. They are NOT to be duplicated, rather are to be used to reflect on how you will describe your own circumstances and how your journey through the MS IDD&E or CAS program has informed your thinking and practices as IDD&E graduates. Your scenario will be evaluated based on the criteria listed in this handbook. Three example scenarios are outlined below...

### EXAMPLE SCENARIO 1:

**Organization:** I am employed in a consulting firm<sup>2</sup> that provides a full range of instructional design, development, and program evaluation services<sup>2</sup>. Key areas of consulting include needs analysis services<sup>2</sup>, design and development of instructional materials especially focused on e-learning and online learning environments<sup>2</sup>, off-the-shelf e-training materials product comparison<sup>2</sup>, and program evaluation<sup>2</sup> services. Primary customers include higher education institutions and small industry organizations<sup>2</sup>. Some school systems have engaged our firm in investigating the development of online materials to support students with low performance in core classes (e.g., science, math, reading) and preparation for college entrance exams. We have also designed, developed and presented professional development seminars on e-learning and online instruction<sup>2</sup> for teachers and instructional design specialist in a variety of organizations, using our own blended learning facilities.

**Current project:** Our lead consultant is currently working with a local community college to design and plan the implementation of a program evaluation system<sup>3</sup> for the college's new online course system that was implemented in the last academic year. The online program director at the college is being solicited by the college's president and board to report on progress, successes, and challenges of this new system<sup>3</sup> and provide recommendations on how to use funding to best support<sup>4</sup> its continuation. My role is as the lead instructional designer. I am to develop a well-articulated, reasonably comprehensive but not too detailed plan that can be used to describe program evaluation services<sup>4</sup> we provide, articulating the model we use<sup>4</sup> to help colleges evaluate new online course systems (summative evaluation) and enhance them (formative evaluation) based on data collected. The presentation<sup>4</sup> must demonstrate how evaluative data can be used to identify (1) professional development needs<sup>4</sup> for stakeholders (e.g., professors, students, administrators, etc.) and (2) the barriers (non-instructional)<sup>4</sup> to successful implementation of this online / e-learning system. I also must describe how we use evaluative data to design instructional interventions<sup>4</sup>, including the instructional systems development approach we take to resolve learning / knowledge gaps, and the type of learning activities we advocate in our instructional seminars and courses.

**Application of IDDE knowledge and skills to this problem:** The problem<sup>4</sup> I am facing here is.... Overall my approach to developing a solution will include...

The most important competencies<sup>5</sup> that I have developed and will apply to this problem include the following .... The first competency is important because it allows me to address<sup>5</sup> XYZ and engage in ABC tasks... The second competency...

**Knowledge gains from concentration:** Learning about AAA in my concentration area has helped<sup>6</sup> in my thinking to resolve this problem by...

**Personal reflection on my professional identity:** As a graduate of this program, and as evidenced by the scenario of my work, I feel that<sup>7</sup>.... Regarding my competencies... regarding my area/context of work... my strengths and areas for ongoing professional development<sup>7</sup>.. my potential contributions<sup>7</sup> to the instructional science community...

## EXAMPLE SCENARIO 2:

**Organization:** I am employed as a technology specialist<sup>1</sup> at a small rural school district<sup>2</sup>. The district includes<sup>2</sup> one secondary school (Grade 9 to 12), and three primary schools (grades K to 8). Each school<sup>2</sup> has one computer lab and numerous computer clusters in the library. Each classroom<sup>2</sup> is equipped with 4 student computers and a teacher computer station with a projector. About half of the rooms include an ELMO unit and one third have SMARTBoards. All math teachers<sup>2</sup> in the secondary school have access to graphing calculator sets (1 for each student). All science teachers<sup>2</sup> (all schools) have access to a variety of probes and computer software packages to support the science curriculum. Students<sup>2</sup> attend 2 computer skills classes each week beginning in grade 1. Skills courses are aligned with the ISTE standards, primarily focused on software uses. All teachers are provided technology skills training<sup>2</sup> at least 2 times per year and through extended summer professional development sessions<sup>2</sup>. Most of the seminars are focused on how to operate technology<sup>2</sup> or software, little is presented on how to integrate resources<sup>4</sup> into classroom teaching and student learning. About one third of the teachers use the technology in their rooms 1 and 2 times per week<sup>3</sup>. The others use technology less with the exception of the secondary math teachers who use the graphing calculators extensively for regents exam preparation. Most use the computers for presentations and their own record keeping. The student population has a fairly high level of technical skills<sup>2</sup> in regards to using word and PowerPoint. Most students begin to use the internet for searching and writing activities in 4<sup>th</sup> grade. Uses of other software (e.g., spread sheets, concept mapping, etc.) and technologies (e.g., probes, etc.) is rare<sup>3</sup>. A large part of the student body is, on average, low performing in academic courses<sup>4</sup>. My role is primarily to maintain our technology<sup>3</sup> (e.g., inventory, install, trouble shoot, recommend equipment/software updates); support teachers<sup>3</sup> in the computer labs as requested; provide professional development sessions<sup>3</sup> for teachers (e.g., either teaching session myself, identifying qualified vendors, etc.); support all technology uses<sup>3</sup>.

**Current project:** An important goal for the school this year is to identify and develop technology-enhanced ways to help students who are performing poorly in science, math, and reading classes<sup>4</sup>. Given that providing extra support by the teacher during class time is a burden, the school administrators and a team of technology savvy teachers and parents have decided that developing technology-based study and tutoring spaces for students in need of extra help is a priority<sup>4</sup>. The concept is that this intervention will include identifying and providing technology tutorial software<sup>4</sup> and self-study/testing packages, sets of accompanying subject matter resources at each station<sup>4</sup> (e.g., science station, math station, reading/writing station, etc.); tutors/monitors to help students engage effectively<sup>4</sup> with technology during self-study, develop study skills, and help to assess their progress<sup>4</sup>; and teacher will have access to the system to monitor their students' progress. The students in need of tutoring will be scheduled during their study periods and after school, as appropriate, to use these stations, thus this is not to replace classroom activities. The team has asked me to take the lead on crafting a plan<sup>3</sup> to provide this support system for the high school students. Their expectations are that I define the subject matter areas of greatest need, identify or create instructional materials to support students subject matter gaps, design the computer station and identify required resources, determine the number of stations required, and draft an implementation plan<sup>1</sup>.

**Application of IDDE knowledge and skills to this problem:** The problem<sup>4</sup> I am facing here is.... Overall my approach to developing a solution will include...

The most important competencies<sup>5</sup> that I have developed and will apply to this problem include the following .... The first competency is important because it allows me to address<sup>5</sup> XYZ and engage in ABC tasks... The second competency...

**Knowledge gains from concentration:** Learning about AAA in my concentration area has helped<sup>6</sup> in my thinking to resolve this problem by...

**Personal reflection on my professional identity:** As a graduate of this program, and as evidenced by the scenario of my work, I feel that<sup>7</sup>.... Regarding my competencies... regarding my area/context of work... my strengths and areas for ongoing professional development<sup>7</sup>.. my potential contributions<sup>7</sup> to the instructional science community...

### EXAMPLE SCENARIO 3:

**Organization:** I am employed as a human performance training developer<sup>1</sup> in the service organization<sup>2</sup> for a large consumer products<sup>2</sup> company. Our department responds to customer questions and complaints about our products. My role is in human resources and I am responsible for the productivity<sup>1</sup> of our customer service representative.

**Current project:** The major issue I am tasked with resolving is to increase the productivity<sup>1</sup> of our customer service reps. The biggest issue is that customer service reps are not satisfactorily responding to customer calls<sup>3</sup>. We have identified that the issue is not related to<sup>3</sup> telecommunications equipment, policies or guidelines in responding to customer inquiries, tracking of customer service calls and their resolution, incentive and disincentive systems, or hiring issues. Rather it has been determined that with a rather large turn-over rate in customer service reps and emergence of new product every few week, that the customer service reps are lacking the knowledge<sup>3</sup> of how to respond to customers, how to resolve questions and problems related to new products, and how to communicate with irate customers. Thus, my role is to design training<sup>1</sup> to be used during orientation of new customer service rep, on-the-job reference materials to support reps just-in-time while taking customer calls, and a program evaluation<sup>1</sup> system to track success of the training.

**Application of IDDE knowledge and skills to this problem:** The problem<sup>4</sup> I am facing here is.... Overall my approach to developing a solution will include...

The most important competencies<sup>5</sup> that I have developed and will apply to this problem include the following .... The first competency is important because it allows me to address<sup>5</sup> XYZ and engage in ABC tasks... The second competency...

**Knowledge gains from concentration:** Learning about AAA in my concentration area has helped<sup>6</sup> in my thinking to resolve this problem by...

**Personal reflection on my professional identity:** As a graduate of this program, and as evidenced by the scenario of my work, I feel that<sup>7</sup>.... Regarding my competencies... regarding my area/context of work... my strengths and areas for ongoing professional development<sup>7</sup>.. my potential contributions<sup>7</sup> to the instructional science community...

**Good luck!!!**

**Believe in yourself!**

**The process you are about to go through is  
worth the effort!**