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Quality Assessment

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1 Scope

This document is part of the WP6 Quality Assessment production. It is intended to be used freely, in particular by the members of the project in order to implement the ideas described in it, into questionnaires to be taken online, methods to assess and use the results of these questionnaires, a set of documents to accompany the services and processes.

2 Executive Summary

Quality assessment of e-Learning has slowly evolved into a clear necessity. Yet its implementation is difficult and its acceptance by the community is not always straightforward.

In this document we describe how the quality assessment is implemented in the INTERGEO project. There are two levels in it, the quality assessment of the processes that enter the use of the services and the quality assessment of the e-Learning content in itself by user's evaluation reports which is the main point we will focus on.

The main outputs of this work are

- a questionnaire to be taken by teachers that plan to use or used a resource, to evaluate different aspects of the quality of their planned or passed teaching experience, in order to give a ranking score to resources and to identify directions of possible improvements;
- the implementation of a quality approach based on a set of best practices, rules of work, incident reports and quality steps, to be used in the quality management of the processes during the use of the services the project provide. These documents are the result of a light adaptation from the e-Quality project [27] and only the life-cycle of the two main roles, namely the author and the tutor, are included for completeness.

This work is based on didactical analysis as well as the e-Quality model of activities through the definition of roles and artifacts in a Unified Modeling Language.

We won't address specifically the quality assessment of the different Dynamic Geometry Software (DGS) that are used to manipulate the resources, but only its effect on the service and the resources themselves, although the former does influence the teaching experience and the evaluation of the latter in more ways than simply an interoperability issue.

3 Methodology

Quality evaluation is now accepted in the e-Learning community as a requirement; but the implications of quality management and the understanding of the associated processes have not yet percolated into the community of users [8], although its need is clearly identified as was shown in the survey we conducted at the proposal stage, and in the INTERGEO report D5.1 on Dynamic Geometry Usage [28, 11].

Our methodology stems from previous European projects namely the JEM and the e-Quality projects, together with a didactical analysis of the users' evaluation report by the Institut National de Recherche Pédagogique (INRP) authors and the IREM project SFoDEM (see Sec. 4.2).

- JEM: Joining Educational Mathematics is an eContenPlus Thematic Network that began in 2006 and will last for 3 years. The JEM network delivered guidelines and best practices regarding evaluation criteria for eContent quality in mathematics (Deliverable D2.1).
- e-Quality: Experienced-based Quality in European Open and Distance Learning is a SOCRATES MINERVA European project that ended in 2006. The project delivered guidelines, process charts and a software to model the processes that take place in the creation and delivery of Open and Distance Learning courses to university students [8, 20, 14]. We adapt this methodology and the contents to our present situation which is different but related, of the delivery of eContent to secondary math teachers. The adaptation is relatively light and the core of the material was developed by the e-Quality consortium. The authors would like to thank Pr. Michelle Joab for her valuable help.
- SFoDEM: a training program that was created by the IREM (Institut de Recherche sur l'Enseignement des Mathématiques) of the Université Montpellier 2 in Sept. 2000 and lasted for six years. It stands for Suivi de Formation à Distance pour les Enseignants de Mathématiques, meaning "progress assessment of distance learning for mathematics teachers" [13, 9]. It constitutes the genesis of the INTERGEO project.

These projects synthesize and generalize previous methodologies on the issue of quality management that we will not summarize here.

3.1 Objectives

Quality assessment of eContent and of the processes linked to its delivery is necessary for several reasons, the two principal being the quality insurance of service, and the ranking of material by users' evaluation.

Quality assurance of the **processes** linked to the use of the services is a clear objective: seen from the teacher's perspective, best practices should be used in order for the services to be delivered in the most efficient way and quality steps to be taken when incident reports are filed in order to improve the quality of service. This means that fewer failures take place, fewer resources are diverted to address them, and the overall satisfaction of the user is not impaired, her/his trust in the project is built through a feeling of confidence.

We address this view of quality assurance through adopting the **model of pro-cesses** defined by the e-Quality project, adapting the definitions of activities, roles, artifacts and workflows that may take place in the use of the services from the teacher's perspective, and issuing best practices, charts, incident forms and methodological guidelines.

Quality evaluation of **resources** themselves, mainly based on users' reports, has more complex objectives. The first one is **usability** and especially searchability: we want the "good" resources to be ranked first by a *search engine*, the score of a given resource will be weighted by the overall quality evaluated by users, providing a sense of confidence for the teacher to use the resources. The second one is **reusability** by improvement of resources and their metadata through *quality cycles* based on users' feedback. And this quality steps can be taken in different directions, namely improving the intrinsic quality of the resource or repositionning its pedagogical metadata asserting its objectives. That is to say a resource may be rich and improve teaching in some given situations and may not be adapted in other situations, the narrowing of the associated metadata to specific situations is part of the quality steps encompassed by the project.

We make this users' evaluation possible through the careful elaboration of a **questionnaire**, simple enough to be used massively and accurate enough to allow for more than a ranking of resources and for precise detections of aspects to be improved.

In the second year we will bootstrap these quality improvement cycles by organizing tests of resources in the classroom and analyzing quality reports from users' evaluations.

An aspect of the subject that is **outside the scope** of the project, but that we will nevertheless address in the model of the processes, is the elaboration of **new content** or the structuration of existing content, around specific issues such as the adaptation to a given pedagogical context, for example "la perspective en classes de lère L". Through facilitating online social networking, we will allow the community to appoint content managers that will supervise a given subject area, the pedagogical planning, the recruitment of volunteers to adapt or author pedagogical and technical content related to the issue at stake. But we will not organize these networks ourselves. We will **not** try to organize the existing contents that we provide per subject, per country or per level, in a **top-down** approach **but** will simply provide the community with enough tools, including quality assessment tools, to organize itself in a **bottom-up** approach, as users

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see fit. Our belief in the "wisdom of the crowd" will prove whether funded or unfunded and the user's experience at the completion of the project will largely depend on the success or failure of the whole **web 2.0** approach on which this project is based.

In many cases, assessing the fulfillment of a Quality criterion is not simple. This can be due to several reasons, but it is usually either because there is no means of measuring accurately and objectively (e.g. learner satisfaction, or the suitability of the teaching method) or the thing to be assessed is simply not measurable directly (e.g. all learners have 24/7 access to the VLE)

The four generic tools to assess one or a number of aspects of the Quality of the e-learning process are:

- 1. checklists, ensuring that every Quality aspect is going or has been taken into account,
- 2. incident forms, to report a quality breach,
- 3. questionnaires, to give assessment through feedback,
- 4. web server usage logs.

The central tool in our approach is the questionnaire filled by teachers planning or having used a specific resource in the classroom.

3.2 Modeling processes

The modeling of the activities, roles, artifacts and workflows that take place in the use of the services related to the project is based on the work of the e-Quality SOCRATES MINERVA European project [27]. We used the software eLUP "e-Learning Unified Process", based on Unified Modeling Language (UML), that structures the quality approach, and adapted the framework and the content that were produced in the e-Quality project [14]. These adaptations are light; some adapted content is given in the appendix, to be understood as authored by the e-Quality project; our contribution resides in a description of a vision of the implementation of this quality approach.

This methodology decomposes the processes that take place into **workflows** of **activities**, performed by persons enacting a **role**, through interactions with **artifacts**. You can find the definitions of each identified artifacts, roles and associated iiiiiii .mine activities in the e-Quality project [?] and ====== activities in the e-Quality project [20] and i_{iiiii} .r488 lightly adapted to our context. From the e-Quality project we single out the two main workflows:

– Life-cycle of a teacher in Sec. A,

We adapted the existing workflows and workflow details from the e-Quality project without changing their global structure. Our adaptations are minor. These workflows are described in the appendix.

Each workflow is decomposed in activities, roles and artifacts forming a diagram. These diagrams are commented in the corresponding sections and each activity is defined in a separate sub-section, together with its best practices and the quality processes that follow.

These quality processes are identified by a quality criterion and a commitment to ensure the criterion is met, which is checked by subsequent indicators, before, during or after the activity. Once again our contribution is light.

The main focus of our interest is the principal end-user, namely the secondary math teacher and our goal is to provide her with a good teaching experience through her life-cycle as user of the project. To achieve that goal, we need to understand and model the different life-cycle of a resource, its genesis, its planning, its design, its production, its use and its improvement. We need to define conceptually the processes and the activities that take place, the roles of the people that act and the artifacts that they interact with. This lead to quality criteria, commitments for these criteria to be met and best practices to facilitate these commitments.

e-Quality in ODL	Student	Teacher	Institution	Course	Learning event
INTERGEO	Teacher	Author	Project	Resource	Teaching event

Table 1: The correspondence between e-Quality and INTERGEO models

We analyzed the educational model proposed in the e-Quality project and found it was possible to adapt it to our situation. The e-Quality project focused on providing a **student** with the right cooperative framework for him to **learn** from an Open and Distance Learning university **course** and assess the learning experience. Our objective is to provide a **teacher** with the right framework to **teach** using a particular **resource** found on our web-site and assess the teaching experience. The artifacts are similar, the roles are somewhat shifted, as summarized in Table 1, but the need for emulation and support, feedback and analysis are strikingly akin.

Some features in ODL are of course irrelevant. For example diploma are not to be considered. Learning scenarii might develop afterwards based on the curriki platform that we are using, but are outside the scope of the INTERGEO project at this stage. Nevertheless the analogy was very fruitful and led us to include activities that we had not identified at first as important in our preliminary conceptual model.

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Of course some other processes that are relevant to our model don't have an analog in the ODL model. The crucial example of this is given by the promotion of roles, which is alien to ODL where a student remains a student and a teacher a teacher.

Following this analogy, the adaptation of the content, workflow charts, best practices, indicators produced by the e-Quality project is relatively light. The core of the content developed by the e-Quality team is recycled in the annex of this document. The main difference consists in **roles**. In ODL a student remains a student, and there is a clear distinction between the status of an academic and of a student, a teacher being unable to attend a course for example. In the INTERGEO project, on the contrary, every role is supposed to be filled by the same kind of users, that is, secondary math teachers, who enact fluctuating roles. They can be a simple user of a resource, while being the author of another, testing in the classroom a third one, tutoring on the use of a fourth, and managing the content of the subject "Thales theorem in Hungary" for example. Therefore the roles are specific to a given user regarding a resource follow this cycle:

Simple user \to a priori reporter \to enrolled teacher \to a posteriori reporter \to tutor \to author \to manager

3.2.1 Teacher's needs

This model is not only a convenient way to describe the processes but is as well **diagnostic** [2] and can be used as a tool for quality, understood as a continuous workflow oriented to taking decisions to improve the situation. Our main interest is to satisfy the needs of the teacher along his use of the services, described in Table 2. This model will help us to define the correct user's interface of the platform in order to make as sure as possible that most users needs are met.

To summarize, the teacher searches the server for resources to teach in her/his classroom; once found, s/he enrolls as a user by providing an a priori assessment and scheduling the course. After an appropriation phase, the course is taught and an a posteriori evaluation is given. S/he can then be promoted to the role of tutor of the resource.

3.2.2 Author with hats

The teacher using a resource revolves around the needs described in Table 2 and goes around the cyclic process described in Fig. 2. But the resource itself follows a similar cyclic process, it has to be planned, designed, produced, prepared, advertised, usage has to be guided and supported, pedagogically and technically,

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Stage	Description	Teacher needs
Teacher needs and interest in the offer of the project	At this point, the teacher dis- covers that our project is of- fering resources, which may meet his/her needs.	Between this stage and the subsequent step in which the teacher will join the project, there is a need to satisfy the information requests from the teacher, to inform him/her about the features of the resources, how to register, the necessary technology equipment, the charac- teristics of interactive geometry teaching
Teacher joins the project	Once the teacher is registered, some other needs arise: At this point, it is very impor- tant that the project offers ap- propriate ways to meet these needs. The process of 'join- ing' is intended to organize and control the performance of these aspects.	 Need to inform the teacher on the use of the technology: virtual learning envi- ronments, interactive geometry, beamer technology Need to set-up schedules, rules of work Need to receive administrative and tech- nical support
Teacher is ready to enroll as a user of available resources	At this moment the teacher has all the information and skills to start using any re- source. During this and the following two stages the teacher may also need tech- nological support, administra- tive support or other services	 Need to find and obtain resources from the repository Need for technical support Need for administrative support
Teacher enrolls as a user of a re- source	Start of the learning/teaching process	 Need to receive learning materials, teaching materials and other resources Need to receive tutoring support Need to receive technical support Need to receive administrative support
Teacher per- forms the teaching event	End of the teaching process	 Need to give feedback regarding the teaching experience Need to give suggestions regarding the improvement of the resource Need to receive a promotion (as a tutor or author) if interested

©INTERGEO Consortium 2008 Page 12 of 55 Table 2: Adaptation of the five main stages in the teacher life-cycle, from the e-Quality project to the INTERGEO project

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a feedback has to be given during the appropriation stage and after the teaching event.

The author of a resource has several hats on her head to manage this cycle. In nowadays interactive geometry communities, the author is very often confused with the only role of **content producer**. She indeed provides the contents of the learning resource, but other roles have to be taken into account, she states the intellectual property license; planning and designing, for example, have as well several aspects, whether pedagogical or technical.

It is nevertheless true that due to its technical aspect, interactive geometry needs good learning material producers, experts of their tools and understanding the limit of interoperability. They really are the "kings in the INTERGEO castle" and even though we wish to point out that their role is multiple, the community will continue to summarize it under the term "author".

In order for a teacher contemplating the use of a resource to actually use it in the classroom, some motivation and guidance are required. This is the main role of the **tutors**. The author of a resource is its first tutor but he can be joined in this task by other teachers that used and liked the resource and who want to promote its use by helping others coping with problems they might encounter. This help is mainly done through collaborative tools such as forums and chats embedded in the platform and attached to the resource. The output of this guidance is the adoption by the teacher of a schedule for the use of the resource, both in her teaching progression throughout the year so that it will fit in the course, but as well locally the planning of the resource during the teaching event itself. This is summarized in an individual teaching plan where all the resources from the project used by this particular teacher in a given class are planned, it is a place where the learners are sent in order to retrieve the assigned activities.

Just as a teacher can be promoted to the role of tutor, after a cycle, the resource does not necessarily die and can be improved by taking quality steps towards a revised version. The **quality manager** of a resource is going to be, at first, in a bottom-up manner, the author of that resource. More elaborate quality management of resources through their integration in subject areas managed in a top-down approach is to be encouraged but the project will not try to organize this more than providing the tools to the community for its self-organization. Before this organization process bootstraps itself, it is the responsibility of the author herself to establish the quality approach, to budget the human costs of quality steps, to establish or not training programs and optionally to take advice from the coordinator of the subject area if there is one in order for the resource to fit in a general learning plan. She will be helped in this by the feedbacks from users.

This **feedback** consists in assessments from the users through filled questionnaires and in forum interaction. The users who answer to questionnaires will be mainly teachers who use or plan to use the resource, or the author herself, but can be as well didactical experts contacted through the coordinator, who

conduct researches on the use of the content from our project. The questionnaire itself is the topic of Sec. 6. This feedback from the user is quantifiable and statistical when it comes from the numerical values collected by the questionnaire, but consists as well in verbal exchanges, linked to the questionnaire or on the forum attached to the resource, acting as a mailing list. This is especially valuable for the author in order to take the fundamental quality step of revising the resource, whether reusing it in another context or simply producing an incremental version.

It has to be pointed out that according to the **license** given to the resource by the author, other users may or may not take on their own hand this quality step of revising the resource. The first authoring activity, which is often overlooked or forgot, is to choose a distributing license. The INTERGEO project promotes the use of open licenses such as the Creative Common Share Alike so that adaptations, whether light such as translations, or heavy such as redesigns of pedagogical goals, can be undertaken by teachers other than the author. It is specially the case of tutors, their natural role is to be promoted from a pedagogical tutor to the author of the next version. Such endorsements exist in open-source software projects where commiters fell responsible for the project. In the same manner, we think that teachers will organize in teams of tutors and that these tutors will promote improvements and will commit new versions. The project will bootstrap this approach on selected contents during the quality testing that will happen in the second year of the project.

3.2.3 Licenses

Unclear licenses are a real impediment to the use of resources found on the Internet. The INTERGEO project aims at rising the awareness of the share holders in the value chain to this issue. The author (or in a more elaborate set-up the learning material designer) has to choose a license contract for the content that she intends to produce. The INTERGEO project is promoting the use of open licenses that allow adaptation and reusability such as the Creative Commons Share Alike license. The main issue at stake is the possibility for a user to change role without having to ask for permission: a tutor seeing a need for improvement in some content can edit it right away, thus becoming an author of the resource, while more restrictive licenses will require the user to wait for author(s) approval. We will propose several licenses from which to choose, namely (for the time being):

- Creative Commons Public Domain
- Creative Commons Attribution-Sharealike
- Creative Commons Attribution Sharealike Non-Commercial
- Creative Commons Attribution-Sharealike Non-commercial-No Derivative

- GFDL GNU Free Documentation License

It is not in the scope of this document to discuss these licenses but quality improvement goes hand in hand with promoting reusability and adaptation, which leads to the preferred choice going to CC Share Alike license. Authors have to make informed choices and we will provide FAQ regarding legal matters to prevent misunderstandings, for example it is not because some content is licensed with an open license that its author loses his right to relicense it with a more restricted license for another use; he can distribute his own selected content, available for free on the server, through a commercial editor with a standard commercial copyright. The technical implementation of these licenses should reflect their philosophy and legal bindings, for example a user of a resource should be able to contact the author(s) of a resource to ask for permissions for a given use if this permission is not granted by the license; or a change in a resource should trigger a message to be sent to its authors so that they can ask to be removed from the list of authors if the content no longer reflects the pedagogical choices they initially had in mind regarding the resource.

The author can be a person or an institution as well as an avatar but has to be ultimately linked to an identified user responsible for her/his production.

An author doesn't lose her/his right to relicense the content for another use, for example for commercial distribution.

S/he can ask to be removed from the list of authors of a resource that has been adapted in a way that no longer reflect her/his views.

3.2.4 Reuse

The reuse and improvement of existing material plays a crucial role in the IN-TERGEO project. While our first goal is towards the effective use of the available content in the classroom, the sustainability of the project relies on its adoption by the users through a quality approach, bringing confidence in the content hosted by the project. This will only occur when the existing material quality is assessed through users' evaluation, the feedback pointing towards ways of improvements, and this feedback being taken into account in the actual revision of the existing content according to this feedback. As we see in Sec.6, the feedback given by users of a resource will be of two kinds, a numerical evaluation of different criteria and a textual feedback through the forum. Both feedbacks have to be taken into account. This will prove difficult if no common language is used by the users and the tutors, small homogeneous design groups should be fostered.

Interactive geometry resources are usually pedagogically and technically planned, designed and produced by a small group, sometimes by a unique person, enacting different roles that gain to be explicit. It is a mixture of technical possibility, together with a desire to illustrate a notion with an available tool that yields

the production of a usage scenario adapted to the artifact that has been so produced.

The INTERGEO project intends to promote the creation of teams that will unite around an idea, based on learning material, leading to a possible usage and to its production as a multimedia artifact. The preliminary design of a resource will take place whether in face to face meetings or through the online forum and chat tools. We expect that some inspiring resources will remain as **germs**, work in progress forever, without clearly identified pedagogical use, stemming different finalized resources for different situations. Creativity has to be promoted.

The use of available external media, such as free picture, sounds or content repositories will be as well promoted. Conversely, the INTERGEO project will provide, together with the open file format standard, a standard for the Application Protocol Interface (**API**) of the different software, allowing for the development of external exercisers, learning scenarii and learner's activity control, based on pieces of interactive geometry found on the INTERGEO website. It is not the purpose of the INTERGEO project to develop such tools but to work towards making them possible through an easy integration by an interoperable API and easy automatic retrieval and navigation through the repository.

3.3 Implementation

As we repeatedly mentioned, the model of the processes is the work of the e-Quality project and our adaptation is minor. Our main contribution to the process model is the implementation of the role changes.

The completion of a task entitles the user for a promotion to the next role.

3.3.1 User to Reporter

A simple user can browse our repository, download and use a resource, together with associated pedagogical documents, for the teacher, for the learners, the general guidelines, the users forum of the resource and so on.

This activity will be tracked by the platform and will adapt the user interface accordingly: after having tracked a complete review of the available data, or a download, the system will present an a priori questionnaire to the user.

Hits statistics of the resource have to be apparent, such as "two users are viewing this resource", so that a user can see that his/her action is taken into account.

3.3.2 Reporter to Teacher

If this questionnaire is filled, enrollment as a teacher planning to use the resource is proposed.

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A positive answer will provide with a form to be filled, attached to the resource and specific to this teacher, asking to decide for a scheduled date for the teaching event. This form will be revisable by the user. The schedule is accessible through a permalink URL that the teachers can distribute to their learners.

User's story example: "For tomorrow assignment on proportionality, I advise you to go through the activity that we did yesterday, titled 'measuring a pyramid', you will find it on the webpage for the class on the INTERGEO project."

A reminder is sent by email, to the teacher and to the tutors, if the teacher is not active on the forum asking questions or reporting on his appropriation of the resource prior to the teaching event.

A compilation of filled questionnaires, whether a priori or a posteriori, with their numbers and statistics is available. The name of each enrolled teachers with the scheduled date is available if authorized by the teacher. A map of their localization could be a good idea to promote the sense of reality to the community.

3.3.3 Teacher to Tutor

After the date of the teaching event, the a posteriori questionnaire is made available.

A reminder is sent by email, to the teacher and to the tutors, if the teacher does not report on the teaching event.

Once the report is given the teacher is automatically congratulated and is proposed to become a tutor in order to support fellow teachers.

The name and characteristics (since when, number of interventions) of each tutor is available if authorized by the tutor.

3.3.4 Tutor to Author

A seasoned tutor that actively supported several teachers surely has gathered ideas about improving the resource and this knowledge should be invested in the creation of a new version of the resource, so a promotion will be automatically proposed at some point to be decided on actual usage analysis.

The name and characteristics (since when, number of interventions, cause of the changes) of each author that has contributed to the resource is available, if authorized by the author, to promote the feeling that feedback is taken into account and that anybody can and should participate.

3.3.5 Author to Manager

The promotion to manager of a subject will be definitely left to the community to organize, whether on a voluntary basis as self-promotion, or through internal hiring of key authors. The INTERGEO project will bootstrap this process by selecting and appointing experts in interactive geometry for different broad subject areas such as language or preferred software but the actual organization of their subject will be left to them.

The name and characteristics (since when, responsibilities) of each manager that has contributed to the subject is available, if authorized by the author, to promote the feeling that organization is taking place and that anybody can and should participate.

3.3.6 User's interface

We describe a full fledged resource in Sec. 4.2 as a collection of sheets, a learner sheet, a teacher sheet, a technical sheet and so on. Only the learner sheet is visible to a visitor which is not an identified teacher so that learners can be directed to the resource page for an online use of the resource.

Each sheet is associated, on the resource page, to a "tab" which opens it. Other technical tabs allow to edit the sheet, see its versions or use its forum facility. A tab is grayed if the information is not yet present or if the status of the user does not permit to perform the action. Tabs such as "Edit" should be grayed when the license or status does not allow the action, but should nevertheless trigger a contextual action such as "become an author" or "contact the authors" depending on the situation.

Each sheet consists of a wiki page where the insertion of interactive geometry constructions is done in a easy to use wiki syntax in the same way as a static images.

All sheets are exported, together with the construction files, in a downloadable bundle that can be viewed off-line.

This users interface stems from the work of the SFoDEM project [9, 13, 10] at the genesis of the INTERGEO project.

4 Questionnaire elaboration

We are describing in this section the methodology that lead us to define the resource evaluation questionnaire by the users. We are not concerned here about other processes or overall project quality.

In a nutshell, our methodology is the following:

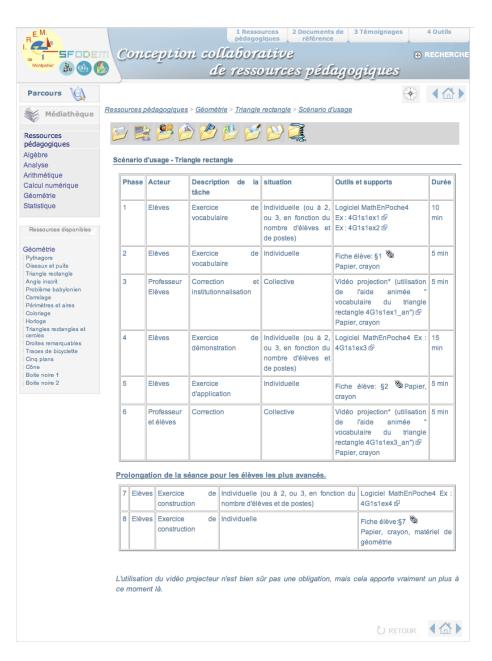


Figure 1: The SFoDEM CD-ROM interface for a resource, the usage scenario tab.

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- Identify each characteristic relevant for the quality of a resource
- Formulate its evaluation as a question in theoretical terms
- Reformulate this question in a language accessible to the user
- Reformulate the question to make it quantifiable
- Organize and compile the answers into several grain levels of quality.

4.1 Types of resources

The characteristics and evaluation criteria differ depending on the type of resources we are going to assess.

Resources deposited onto the platform so far are not yet homogeneous (cf. Table 3). The quality assessment process has to be adapted to the type of resources. Table 3 presents different types of resources that have been deposited on the platform before March 2008.

The common file format and what exactly we mean by an Interactive Geometry construction (or Dynamic figure) has not been officially settled yet but the consortium does agree that the following three types of resources will be considered in the INTERGEO project:

- 1. A figure alone with a short description of the figure and its pedagogical goals;
- 2. A figure, or several figures, included in a text. The text can be addressed to the teacher, the learner or both.
- 3. A file (word, pdf, video or other downloadable format) whose content refers to either of the two previous types of resources.

The assessment process discussed in what follows focuses on the second type of resources which are full fledged interactive geometry resources. Some aspects of the quality assessment process will not apply to the first type of resource (bare construction).

4.2 The SFoDEM model

We elaborate on the type of resources available on the INTERGEO platform by describing the SFoDEM project, that constitutes the genesis of the INTERGEO project.

The bare constructions are interesting as fragments to be used in alien VLE that use them for illustration purposes inside documents in an environment

1.a	Figure alone	Dynamic figure (i.e., figure with free objects that can be dragged)
1.b		Animation (i.e., figure that can be modified by means of exterior parameters)
1.c.		Figure with menus allowing constructions or other mod- ifications of the figure (ex. TracEnPoche)
2	Figure from 1 with a problem text	Interactive exercise
3	Software	
4	Exercise with a text suggesting a pedagogi- cal enactment	Resource from 2 with documents (e.g., worksheet, teacher file, learning scenario)
5	Figure from 1 with ex- amples of pedagogical use	
6	Web site presenting lec- ture, figures, exercises	

Table 3: Different types of resources available on the $\ensuremath{\mathsf{INTERGEO}}$ Platform.

over which we don't have control, just like some pictures from a free repository can be embedded in a web page or document that has no formal connection with the repository. It is a vision of the project that interactive geometry could pervade tomorrow human interfaces as a standard for interactive objects, just like jpeg pictures (Joint Photographic Experts Group) have allowed for the creation of attractive web pages. Although the INTERGEO server has the clear goal to host such constructions, these bare constructions are not to be assessed as independent entities in the same manner as more elaborate pedagogical constructions.

Indeed, what is the subject of our quality assessment consist in resources of interactive geometry together with a minimum description of its usage. We intend to adopt the SFoDEM model of resources [9, 10]. It relies on three main hypothesis which are still valid for the INTERGEO project:

- 1. The adoption of e-Learning in the classroom requires support centered on pedagogical design and planning of resources.
- 2. Pedagogical resources are to be considered as living beings, evolving in response to its usage and through collaboration of teachers that use it, becoming instruments [22] of professional practice.
- 3. This collaboration takes place when a community of practice [31] emerges around a common objective, a feeling of trust and the sharing of resources.

This training program led to the elaboration of a common framework, defined roles and charts and produced many pedagogical resources.

The SFoDEM resources specifications helps the authors formalize their pedagogical resources in a way that eases re-usability and quality assessment, by identifying, for a given activity, the teacher pedagogical objectives and roles in the teacher sheet, and the learner assignment and description of tasks in the learner sheet to be distributed. Even the better designed exercise is not self explanatory, it is much better practice to explicit the pedagogical intended scenario outside the actual document, with expected difficulties, time allocations and activities sequences in the scenario sheet.

In this framework, a resource goes through several stages, from a resource germ to a full fledged resource consisting of several elements:

- an identification sheet stating the title, authors, license, versions and history, short description;
- a teacher sheet describing an activity from the point of view of the teacher, containing the subject matters;
- a learner sheet describing an activity from the point of view of the learner, for example asking questions to be answered by the learner;

- one or several usage scenario [30] describing an open schedule for the activity decomposed in phases, with actors and performed activities;
- a technical sheet describing the technical details, together with the construction files and download bundles;
- usage reports, from the teacher point of view;
- productions, gathering traces of the work that took place, learners screenshots, mistakes, good ideas that emerged...

Most resources at the start of the INTERGEO project will be germs, with a simple identification sheet, a technical sheet and sometimes a learner or a teacher sheet.

4.3 The ARCS model

John Keller has formulated pertinent criteria to assess the quality of e-Content called the ARCS model, short for Attention, Relevance, Confidence and Satisfaction [15]. They have to be considered in the teacher's and in the learners' perspectives:

- Attention: The content should engage learner's attention at once. It is an amazing experience to see how a piece of good interactive geometry manipulated by a skilled teacher results in learners that can not wait to put their hands on the mouse and manipulate the construction themselves: The construction is reacting to the user's input, giving its name to one of interactive geometry constructions nicknames "Imaware", short for "I'm aware". The learner wants to understand the figure and by a sort of empathy, builds a mental model of the construction, which is the most profound step of learning.
- Relevance: Learners are overloaded everyday by attractive and irrelevant material such as advertisement, they build protection mechanisms against it and the material shown to them has to prove relevant by examples and applications. Another type of relevance, from the point of view of the teacher, is of course the curriculum.
- **Confidence:** The learner should not be put off balance too much by the content, it should add to his/her knowledge and skills in a way that builds confidence in the learner's abilities through active learning and problem solving. From the teacher's perspective, the level and semantic density has to be adjusted to the audience, the subject matters and the technical aspects of the questions should be mastered enough so that s/he feels confident with teaching the resource and handling the issues that may arise.

- **Satisfaction:** The learner should be able to certify that s/he has met the pedagogical goals of the activity and has mastered the material. The teacher should be able to witness a transfer of knowledge and competencies from the e-Learning activity to the more usual form of learning.

This leads to broad criteria to assess the quality of interactive geometry content:

Academic criteria: Accuracy of content, adherence to stated learning objectives, clarity of learning objectives, clear identification of target learners, professional presentation, credits to creators, feedback opportunity/assessment support, appropriate references, identification of pre-requisites

Technological criteria: Ease of navigation/user interface, accessibility, clarity of usage instructions, appropriate use of technology, effective/engaging use of technology, technical requirements documentation, usability in learning environments, metadata accuracy, sustainability and openness

4.4 Assessment processes in interaction

Different types of assessment process are identified in the literature [19], mainly expert review and user review.

4.4.1 Expert review

The expert review will be done in two phases: first, a theoretical analysis of a set of selected resources will be done resulting in the design of an evaluation model, second, a large scale assessment process will be carried out by a group of teachers supervised by mathematics education researchers.

Theoretical analysis The design of this process has been initiated in the framework of a Master thesis. The aim of the thesis is to elaborate criteria to assess the quality of dynamic geometry resources. The proposed criteria will draw on the results of the research studies pertaining the evaluation of pedagogical resources and will emerge from an a priori analysis of several selected resources. The obtained evaluation model will be validated by an experimental study with a group of teachers who will test these resources in their classrooms.

Large scale assessment process by an expert community of practice This assessment process will start in September 2008 and will consist in an a priori analysis of a significant number of resources available on the INTERGEO platform, their testing in realistic contexts and analysing the outcomes of the tests.

Both above mentioned assessment processes done by experts could lead to a quality label of the resource.

4.4.2 User ranking

This is the main topic of this deliverable.

User assessment process needs to be quick, on line and directly linked to the resource. The design of the process requires to:

- Know the profile of the user who will assess resources. At least three different user profiles can be envisaged:
 - teacher (pre-service or in-service),
 - mathematics educator or didactic researcher,
 - outsider
- Formulate quantifiable questions
- Allow comments

The users will carry a weight asserting a degree of trust depending on their status, experience and implication in the project. This weight will be used in averaging different answers into one final score. The degree of detail of answers will be taken into account as well. The feedback will be of two sorts, a quantity for each question, whose analysis will be automated, and an optional textual comment, in their own words, to give a more precise feedback if needed. These comments will be available to the tutors and the authors. If they are in a language they do not understand, this information is somewhat lost.

4.5 Rationale

The proposed methodology will consist in:

- Identifying the relevant characteristics of a dynamic geometry resource in order to asses its quality;
- Formulating questions in theoretical and expert terms; Reformulating the questions to make them understandable by the potential users;
- Reformulating the questions to make them quantifiable: each question should be given one of the following four¹ answers: agree, quite agree, quite disagree, disagree; the scale should always go in the same direction: "agree" being a positive evaluation and "disagree" being a negative statement.
- Designing an algorithm to compute the answers and provide a level of quality

 $^{^1\}mathrm{With}$ an odd scale, the user is attracted by the answer in the middle, which can be difficult to interpret.

Objectives of the quality assessment process: We want to go beyond a superficial report on the use of a resource by the teacher such as "I used this resource, everything went well, I'm satisfied and my pupils as well"! We want to make the teachers explicit tangible elements of the learners' activity with the resource especially in a manner that will allow for the identification of improvements steps to be taken.

The quality of a resource concerns: the resource itself, the metadata which are attached to it, the possibility of evolution of the resource.

The quality assessment process of a given resource will be carried out both **a priori**, i.e. before using the resource with learners, and **a posteriori**, i.e. after having used the resource with learners. A priori analysis will be required from a user when s/he makes a choice of a particular resource. At the same time, it will be proposed to enroll for a teaching event in the classroom (or in a virtual learning environment) using the resource. After having tested the resource in the classroom, s/he will be asked to answer the a posteriori set of questions.

5 Relevant features

Based on this methodology, we list and organize the features of a dynamic geometry resource usage that seem relevant with respect to its quality assessment. We identified five main criteria that are indicators that can be evaluated to assess the quality of an interactive geometry resource. They are themselves subdivided into more precise criteria.

5.1 Appropriation of the resource by the teacher

The appropriation of a resource by a teacher relies on three different aspects of the resource: its mathematical content, the digital file containing the dynamic geometry figure (DGF) and the suggested enactment with the learners.

An important question to which we do not have satisfying answer yet is: which elements of the resource support its appropriation?

This criterion addresses the issues of

- the content quality of the resource, which can be assessed independently of its appropriation;
- the possibility for the teacher to integrate the resource to his/her planned teaching sequence;
- the didactical and pedagogical appropriation of the resource.

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5.1.1 Mathematical and instrumental quality of resource

- 1. Is the resource correct from a mathematical point of view? (Examples of inconsistencies: use of approximate values, calculation with measures, limit cases, position of the figure with no mathematical interpretation...)
- 2. Does the provided DGF correspond to the mathematical activity proposed in the resource? Does the provided DGF behave as it is expected in the activity?

5.1.2 Integration of the resource into the teaching sequence

Some teachers are reluctant to use dynamic geometry because they believe that their pupils need to master the technological tool well enough before using it to learn mathematics. Researchers point out that both competences - mathematical knowledge and instrumental skills - are strongly intertwined (Artigues 2002 [1]). A way to support the appropriation of a resource by teachers is to explicit prerequisites, distinguishing instrumental and conceptual aspects (Restrepo 2007 [23]). The prerequisite should be specified in a document intended mainly at the teacher.

- 1. When the prerequisites are specified:
 - (a) Do they distinguish between prerequisites in terms of mathematical prerequisites and instrumental skills?
 - (b) Are they compatible with the curricula and institutional expectations?
 - (c) Are they relevant with respect to the planned activity?
- 2. To what extent is it possible to reinvest the outcomes of the resource use in the teaching sequence planned by the teacher?
- 3. Is the resource used in an experimental setting of the class, independently of the planned teaching sequence?
- 4. Is the resource used to make the teaching sequence progress?

5.1.3 Didactical and pedagogical appropriation of the resource

Reference to Trouche (2005) [29]: a successful integration of technological tools requires a specific organization of the use of instruments in the learning of mathematics, which is theorized trough the idea of orchestration. It points out that the teacher needs to manage the uses of instruments and their relation to mathematical learning. To achieve this, the teacher needs support brought by the resource.

- 1. Regarding the organization of the learning and the role of technology, does the resource provide enough elements related to:
 - the management of mathematical content at stake?
 - the management of interactions between learners and dynamic geometry?
- 2. Regarding the pedagogical organisation of the class, does the resource provides enough elements related to:
 - the setting of the classroom (use of a computer by the teacher by means of a video-projection, use of computers by learners in a computer lab, what learner/computer ratio...?
 - the temporal organization of the session with the resource (succession of phases of individual and group work, management of collective phases...)?
- 3. If the resource does not provide any elements about its pedagogical or didactical use: Is it possible/easy to foresee its enactment in the class-room? (a priori) Could you envisage your own way how to use it in your classroom? (a posteriori)

5.2 Added value of dynamic geometry

This criterion aims at collecting users' opinions about dynamic geometry, namely how they perceive possible contributions of the use of DG within the resource in comparison with the traditional paper and pencil environment, as well its contributions to achieve the specified pedagogical goals.

5.2.1 Opinion regarding added value

1. To your opinion, does the use of dynamic geometry in the resource present an added value in comparison with working on this activity in the paper and pencil environment?

In order to deepen the consideration of added value, we suggest to question the users what features of dynamic geometry represent the added value for them. We will refer to research works concerning added value of dynamic geometry and its perception by the teachers (Laborde 2001, 2004, Lins 2003 [16, 17, 18]).

- (a) More precisely, do you think that the added value of the use of dynamic geometry in the resource comes mainly from the fact that:
 - Dynamic geometry is a visual amplifier because it improves the graphical quality and precision of the figure drawn with DG (example of the graph of $x \mapsto x^2$ function or the 3D representation of solids)?

_	Dynamic geometry offers the possibility to obtain easily and quickly many cases of the same figure?
_	Dynamic geometry provides an experimental field for the learn- ers' mathematical activity, because it supports exploration and trial-error strategies?
_	Dynamic geometry encourages learners' autonomy and respon- sibility, because the feedbacks enable them to validate by them- selves their constructions?
_	Dynamic geometry makes possible the articulation of different representations of the same mathematical problem?
_	Dynamic geometry requires working on geometric properties of a figure rather than on its spatio-graphical properties? Indeed, to obtain a figure, which will resist to dragging test, the user has to explicit its geometric properties while constructing it (idea of robust construction).
_	Dynamic geometry allows the creation of new mathematical prob- lems specific to the DG environment (black boxes, soft construc- tions)?
pec way	s commonly accepted that the drag mode represents the most uliar feature of dynamic geometry, which can be used in various vs according to the pedagogical goals aimed at and to the mathe- tical content at stake:
_	to illustrate geometric properties of a figure: dragging and ob- serving that a given geometric property remains unchanged in the figure;
_	to conjecture geometrical relationships: dragging and observing whether the supposed relationship remains present on the figure;
_	to validate a construction (robust construction): dragging and observing whether the geometric properties defining a figure re- main unchanged in the figure;
_	to illustrate the link between hypotheses and conclusion (soft construction): dragging in order to satisfy the hypotheses of a theorem or a problem and observing the property stated in the conclusion as a necessary consequence of these hypotheses;
_	to study trajectories by using the tools "trace", "locus"
asp 200 The	wever, there is also evidence that the drag mode and the dynamic ect of dynamic geometry is not obvious for the teachers (Lins 3, Rollet 2006, Tapan 2006, Soury-Lavergne 2007 [18, 24, 26, 25]). e quality of a dynamic geometry resource and its added value will end on highlighting the use of the drag mode in the description he activity:

(b) Does the resource mention the way the drag mode is used?

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(c) Does the resource explicit the use of the drag mode in the learner's worksheet?

Another facet of the opinion on the added value of the use of dynamic geometry in the resource is related to the contribution of DG to the learning of mathematics:

2. According to your opinion, does the use of dynamic geometry contribute to achieve the specified pedagogical goal(s)?

5.3 Learning potential of the resource

This criterion concerns the assessment of the quality of the resource from the point of view of possible learning. It may be related to an a priori analysis of the resource, before its actual use.

We feel it is important to address the following issues:

- the adequacy between the pedagogical goals specified in the resource and the effective outcomes in terms of learning mathematical knowledge or developing instrumental skills;
- the learner's activity;
- the quality of feedback considered in the resource which will guarantee the construction of knowledge at stake by the learner.

5.3.1 Adequacy between the pedagogical goals and the possible learning (a priori) / the effective learning (a posteriori)

Is the pedagogical goal specified in the metadata?

The above mentioned adequacy has to be checked at two levels where discrepancies are possible:

- adequacy between pedagogical goals specified in the metadata and the knowledge aimed at by the resource;
- adequacy between the knowledge aimed at by the resource and the effective outcome in terms of learning.
- 1. To your opinion, does the pedagogical goal(s) specified in the metadata of the resource correspond to the knowledge/skill that are expected to be developed by using the resource?
- 2. To your opinion, can the expected outcome of the use of the resource be achieved?(a priori)
- 3. To your opinion, is the expected outcome of the use of the resource effectively achieved?(a posteriori)

5.3.2 Learner activity, from passive to active

Berryman (1993) [3] stresses that the learners have to be actors of their learning:

"students need chances to engage in choice, judgment, control processes and problem formulation; they need chances to make mistakes" (p. 375).

The same principle, drawing on constructivist approach to learning and teaching (Piaget 1947 [21]), seems to be commonly accepted in mathematics education. Therefore our interest in this criterion of the quality process is to evaluate the degree of the activity of the learner, to distinguish between activity that lets the learner passive or guides him/her strongly and activity where s/he needs to make choices and take initiatives.

1. Does the activity require the learner to take actions and make choices?

5.3.3 Quality of the feedback in the resource

Referring to the Piaget's theory, Brousseau (1997) [4] says that student learns by means of adaptations to the "milieu" which is source of contradictions, difficulties and disequilibria.

Bound by the didactical contract (ibid.), pupils know they have to behave in a given situation by acting on it. The milieu opposes feedback to actions or to inadequate choices of the learner. In order to learn, the learner has to understand as insufficient his/her control of the situation. Indeed, it is the feedback provided by the milieu that allows the learning occur in the learner. Consistently, Berryman (1993) points out that experiential feedback is key to learning.

1. Does the dynamic geometry figure provide feedback that can be mathematically interpreted so that the learner can validate his/her actions and solution?

5.4 Technical quality of the resource

5.4.1 Exploitation of the resource with other DG pieces of software

1. Can the resource be open and worked out with other pieces of DG software than the one used to create it?

5.4.2 License

- 1. Does the resource need an adaptation to your educational context?
- 2. Does the resource need an evolution that the present license does not allow?

5.4.3 Technical problems

We aim at revealing all possible technical problems that can occur when using the resource:

- display quality;
- printing quality;
- projection quality when such use is suggested;
- computer crash when opening or working out the resource;
- quality of mathematical symbols edition;
- ...

This can be implemented with a multiple choice box in addition to the question

1. I did not encounter any technical problem (please choose if any).

5.5 Quality of metadata associated with the resource

Two main issues are to be considered (Mahé and Noël 2006 [19]):

5.5.1 Correctness of the metadata

- 1. Are all the required metadata provided?
- 2. Are they accurate?

The annotator tool should check for basic correctness so there might not be a need to implement this sub-criterion.

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5.5.2 Correspondence between the metadata and the resource

- 1. According to your opinion, do the metadata provided in the resource correspond to the resource?
 - (a) Do specified pedagogical goals (knowledge/skills) correspond to the ones the resource aims at?
 - (b) Are the specified mathematical and instrumental prerequisites really necessary in order to use the resource?
 - (c) Is the specified school level realistic?
 - (d) Does the suggested way of using the resource seem relevant?

6 Questionnaire

Here is the a posteriori questionnaire that the previous criteria yield. The a priori questionnaire should be similar. Its implementation has to be simple enough so that basic feedback won't require more than three minutes to fill. It can be a list of five sliders from "I agree" to "I disagree", that can be used "as is" for a quick review, or opened to reveal other more precise sliders for a thorough review. A thorough evaluation should weight more in the averaging process than a quick review. Each statement carries a line for textual comment for finely tuned human interpretation. More detailed explanations and precisions should be given as tool-tips or help pop-ups for each statement.

- 1. The resource behaves as expected, integrates well into my course and it yields progress.
 - (a) The resource is correct from a mathematical point of view.
 - (b) The interactive constructions behave as is expected in the activity.
 - (c) There are sensible prerequisites
 - i. They distinguish between prerequisites in terms of mathematical prerequisites and instrumental skills.
 - ii. They are compatible with the curricula expectations.
 - iii. They are relevant with respect to the activity.
 - (d) I could reinvest the outcomes of the resource use in the teaching sequence.
 - (e) The resource is used in the ordinary teaching sequence and not in an experimental setting.
 - (f) The resource made the teaching sequence progress.
 - (g) There is enough material to understand and teach the content.

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- i. There is enough mathematical material to understand and teach the content.
- ii. The interactions between the learners and the software are well described.
- iii. The scenario clearly describes the setting of the classroom (videoprojection, learner/computer ratio).
- iv. The scenario describes the different phases (schedules, individual or group activities).
- v. The resource does not provide any elements about its pedagogical or didactical use but it is easy to foresee its enactment in the classroom.
- 2. Interactive geometry adds value to the activity.
 - (a) Interactive geometry is better suited for the activity than paper and pencil. Because:
 - The graphical quality and precision of the figure is better.
 - Many cases of the same figures are produced.
 - Learners explore and make conjectures.
 - Learners validate themselves their constructions.
 - Different representations of the same mathematical problem are articulated.
 - Geometric properties of a robust figure are explored rather than metric properties.
 - The problem is specific to interactive geometry (black box, soft constructions...).
 - (b) Dragging free objects helps to understand the illustrated notion. Because:
 - It illustrates invariant geometric properties of the figure.
 - It leads to conjecture geometrical relationships.
 - It validates the robustness of the construction.
 - It illustrates the link between hypotheses and conclusion.
 - It builds trajectories with the "trace" or "locus" tool.
 - (c) A way to use the drag mode is described.
 - (d) The use of the drag mode is described in the learner's sheet.
 - (e) The use of dynamic geometry contributes to achieve the specified pedagogical goal.
- 3. The pedagogical goal is reached, the learners verify they understand.
 - (a) A clear pedagogical goal is specified in the metadata
 - (b) The pedagogical goal is coherent with the knowledge aimed at.

- (c) The effective learning outcome fulfills that goal.
- (d) The activity requires the learner to take actions and make choices.
- (e) The interactive geometry figure provides feedback that can be mathematically interpreted so that the learner can validate his/her actions and solution.
- (f) The learners fulfills unexpected interesting goals or can take unplanned interesting actions.
- 4. The resource is technically robust, interoperable, has an adequate license.
 - (a) The resource can be open and worked out with my preferred software.
 - (b) The resource does not need an adaptation to my educational context.
 - (c) The resource does not need an evolution that the present license does not allow.
 - (d) I had no technical problems. If any:
 - i. display quality;
 - ii. printing quality;
 - iii. projection quality;
 - iv. computer crash;
 - v. quality of mathematical symbols edition;
- 5. The metadata are correct and correspond to the resource.

This can be implemented with an optional browser similar to the annotation browser available for authors and annotators, where the accuracy of each individual metadata could be evaluated for a fine-grain feedback. These metadata should be organized to cover the ontology annotation first, then pedagogical and technical metadata as subdivisions.

7 Risks

We should take into account and evaluate the risks that our quality approach might not be adopted by the users. Some are related to the use of interactive geometry and e-Learning in general, some are related to didactic and pedagogy, some are related to quality acceptance.

7.1 Didactical risks

The main risk is that users won't accept the promotions that are proposed to them, they might not use the project or use it as simple consumers and not as supporters and producers.

- The use of the platform is not easy enough, users don't find content, authors don't upload content or don't annotate properly their content with our ontology, teachers don't report because it is too cumbersome, tutors don't provide support, versionning is too difficult. The usability of the platform has to be thoroughly thought, tested and supported.
- The benefits of good annotation and quality reporting have to be made clear to users so that the effort is worth the trouble,
- the sense of self-supporting community has to be fostered,
- the process of improving a resource has to be eased and
- the evolution of resources has to show how it was shaped by users' feedback.

The SFoDEM project identified several obstacles to the adoption of collaborative work, which is the essence of our quality approach. The solutions they found were to foster a sense of community on the long term, for example by providing training sessions throughout the year. The teachers had to choose between different themes which were offered to them and follow a training on that theme with fellow teachers. The adoption and adaptation of users charts that define the rules of work was as well a practical tool for implication. To make apparent the time line of the resource and to personalize the evolution process also helped by showing the resource as evolving in a way where the input from users is clearly demonstrated. The project is a growing organism shaped by every user.

The INTERGEO project will bootstrap a small community of users that will go through these different stages and cycles, to test the usability and to build communities of experienced users but the risk exists that it proves insufficient.

7.2 Quality acceptance

Quality management is not well established in all European countries and in all fields of activity as was documented by the e-Quality project [8]. Teaching is thought by many actors as an activity that is very intimately personal, many people doubt that it can be taught, think that there are natural born teachers and that nothing can be changed about it. This feeling is real and should be taken into account. Here is a summary of the widely spread false ideas that the project has to address regarding quality management in interactive geometry teaching:

- There is no need for quality assessment, you can tell whether a resource is good by playing with it five minutes.
- It is not possible to improve the quality of a resource, it is whether good or bad.

- Any critics made on my resources is a critic made on myself.
- Collaborative work is a utopy, nobody can understand me.
- I won't benefit from the work of others.
- I will lose control over my work if I choose an open license.
- My work is going to be looted by profiteers if I choose an open license.

These issues are related to general awareness of the community and the INTER-GEO project is simply a part of the overall effort in adoption of good practices in e-Learning. It will benefit from any other effort in that direction.

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Delivera	ble D6.1
Quality	Assesment

Appendix

In this appendix you will find excerpts of two workflows of activities, together with their best practices and quality criteria, from the e-Quality project [27], adapted to our context. Please refer to their deliverables [8, 20, 5, 14, 6, 12, 7] for comparison. We have no pretension at originality: The decomposition of the processes in the e-Quality project can be adapted without much edition to our context, the structure they built is rich enough to accommodate our needs. All the other processes, roles, activities and artifacts described in the e-Quality project have been adapted in a similar fashion to our context.

A Life-cycle of the teacher

This role is the central piece of the project. The teacher searches the server for resources to teach in her/his classroom. Once found, s/he enrolls as a user by providing an a priori assessment and scheduling the course. After an appropriation phase, the course is taught and an a posteriori evaluation is given. S/he can then be promoted to the role of tutor of the resource.

We detail here the workflow associated with the main activities of a teacher using a resource. It is a minor adaptation of the workflow defined in the e-Quality project. We detail each activity with its best practices and the quality criteria it leads to, once again lightly adapted from the e-Quality project.

Once a teacher knows the project and has identified a suitable resource, the central activity towards all the effort of the project is directed can take place, namely the **teaching event** where a teacher uses a resource from our repository in order to teach with it in front of a classroom (or in a virtual learning system). The process involving this event requires essentially five activities described in Fig. 2 and detailed in this section. Similar diagrams are available for other workflows in the e-Quality project [14].

Are not included here the registration and the search processes which are obvious prerequisites to be dealt with separately.

The use of a resource by a teacher is a life-cycle that starts with its selection in a list given by a query, and does not necessarily end in the final evaluation report: teachers that used the resource are encouraged to be promoted to the role of tutor of the resource, in order to help other fellow teachers using the resource. The tutor role itself naturally evolves into authoring new versions of the resource, based on the feedback analysis of the teachers gathered through their reports and the discussions on the forum attached to the resource.

A.1 Familiarization

The activities related to familiarization are an important part of the teachers support, and the success of these activities has an effect on other support activ-

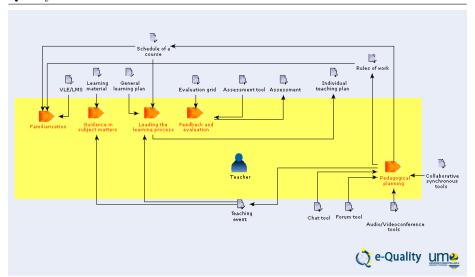


Figure 2: The teacher workflow

ities, especially on the guidance. If the teachers and their learners are familiar with the virtual learning environment and with the technical artifacts then there won't be so many problems later on.

- 1. To provide information about the resource: The teachers should be informed about the objectives, evaluation etc. Also information concerning duties of different actors with their contact information should be available for the teachers.
- 2. To explain the learning methodology and methods: e-learning is mainly based partly on self-learning and partly on collaborative learning, rather than lecturing. These new learning methodology and methods must be explicitly presented and explained to teachers and they have to explain it to their learners to prevent misunderstanding and demotivation.
- 3. To familiarize users with eLearning: It is important to familiarize teachers with the virtual learning environment. New learning environment can even hinder learning if there is no understanding of eLearning or knowledge on how to interact and teach with a virtual learning environment. Initiation has a significant role for the teachers and learners, especially for beginners with eLearning. The familiarization with learning environment, of the teachers and of their learners, should be taken into account in the scheduling. An introduction period can be useful.

The pedagogical planning aims at creating a proper structure for the teaching/learning event. The familiarization is about activities that prepare

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teachers in following this structure and understand the need for such a structure for their own learners.

4. To explain the singularities and special characteristics of eLearning: Especially for beginners with eLearning, it is important to prepare teachers and learners to take advantage of this learning modality and to prevent them from associated constraints and risks like time management, delay to get an answer from the tutor and the feeling of isolation.

Best practice	Keywords	Description
Informing users about special characteristics of e-Learning	Information, fa- miliarization, e-learning	The users should be informed about the special char- acteristics of e-Learning. What kind of challenges may occur? What is typical for interaction in vir- tual learning environment? What are the rules and etiquette for working? Working on-line differs from traditional learning.
Teachers familiar- ization with the use of the Learn- ing environment	familiarization, learning environ- ment	The teachers should have possibility to practice the use of the new learning environment prior to the be- ginning of the course. Getting to know the new tools and way to teach may take time from the actual ap- propriation of the contents.

Quality processes		
Criteria	The learning methodology is being explained to the teachers and they have to explain it to their learners.	
Comment	The teachers and the learners have to be made aware of the learning methodology, in order to avoid wrong impressions or expectations.	
Commitment	Provide adequate information to the teachers and to the learn- ers, about the methodology used in the learning event.	
Indicator be- fore	files and documents distributed at the beginning of the learning event	
during	continuous assessment of each teacher's working progress	
after	teacher' post-teaching event satisfaction questionnaire	

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A.2 Guidance in subject matters

The teacher needs support to appropriate a resource. Questions are asked by teachers and answered by tutors on the forum attached to a resource.

The author provides learning material, supports the teachers by answering subject related questions. The teacher receives support from tutors while using the resources. The author is automatically a tutor of her own resources but is a special tutor in the sense that she knows what she wanted to put in the resource. If tutors' understanding of the resource diverge too much from the view of the author, with incompatible pedagogical approach or a different interpretation of salient features of the activity, a new version of the resource should be authored.

- 1. To teach: The teacher is responsible for teaching in front of her learners using the resource. The teacher must receive enough resources, material, information etc. related to the subject, to work with, and enough support when working with these resources in order to make the resource his/her own (appropriation) and to feel confident that s/he can answer questions or issues raised by the learners.
- 2. To answer subject related questions: The tutor offers guidance and can motivate teachers by asking resource related questions and introducing additional materials.
- 3. To motivate the teacher in the accomplishment of the resource objectives during the teaching event: The tutors support the motivation of the teachers helping them to overcome teaching difficulties in some resource objectives, proposing alternative teaching paths, giving alternative illustrations and examples of useful applications of the subject matter, etc.

Quality processes			
Criteria	Criteria Guidance in subject matter is provided.		
Comment	The authors and tutors are responsible for support related to the taught subject.		
Commitment	The teachers are provided with enough topic-related resource and support is provided to work with these so that the teacher feel comfortable with teaching the resource.		
Indicator be- fore	the duties of the author and of the tutor are made explicit		

A.3 Pedagogical planning

The pedagogical planning connects two processes of eLearning: planning and teachers support. In the planning phase, the resource itself is appropriated by the teachers, leading to the construction of the structure and schedule of the actual teaching event, its date taking into account the position in the year's progress, the organization of the course in itself, and the basis of pedagogy and methods. The author is responsible for the pedagogy of the learning event, that is to choose suitable pedagogical methods and to create activities around the resource to support the learning, based on the learning material provided. S/he is supported in the process by the tutors and authors through online tools. After that the precise schedule and rules for working are created.

We are concerned here with the pedagogical planning of the use of a single resource, not of a complete course development, for a whole school, a country, a textbook. As previously said, this planning will be left to the community to organize. But we think that the quality tools for the planning of a single resource can be adapted to the planning of a more elaborate development.

1. To create a schedule: The structure and schedule of the use of the resource during a teaching event are created based on the objectives and contents of the resource. The schedule has to be planned by taking into consideration the special characteristics of the type of interactive geometry use, whether face to face, mostly demonstrative, supervised or left to the learners. For example, discussions usually take more time in larger groups than in smaller groups. Planning of a resource by a manager has similar considerations. If the resource is very interactive, there should be enough time for the learners to react. Time management and the balance of workload are the key factors in the success of a resource.

The teacher has to decide whether to create a flexible schedule with a possibility for modifications or whether to create a predefined schedule. A resource based on material and self-study can have more flexible schedule than a resource that is based on interaction.

- 2. To define and implement the rules of the work: The teachers should be informed about the required tasks (enrolling for a resource use, reporting after the course has been taught...), deadlines of these tasks and the consequences of missing the deadlines (annoying eamil reminders mostly). There should also be a shared understanding of the objectives and methodology of the resource and the means to implement these goals. The rules are not created just for the learner, but they should also include the tasks of the teacher and of the tutors and authors. For example, the tutors should inform the teachers in which time their questions are answered.
- 3. To choose suitable pedagogical methods: The pedagogical planning includes the choosing of the suitable pedagogical methods. This means

methods to teach the subject, ways to activate the learners in learning and tools for organizing the learning event and work. The pedagogical methods can vary according to the objectives and content of the resource or according to the group of learners, and they reflect the teachers' perspectives towards learning. The learning environment should also be created to support these perspectives.

4. To create activities and resources: To create activities and resources according to planning.

Best practice	Keywords	Description
Never too much information	Information, no- tices	Remember to inform teachers about changes in a resource content or structure. Obscurity and un- certainty diminishes teachers' motivation and cause frustration. There is never too much information.
Inform teachers about your own schedule	schedule, feed- back, information	Inform about your plans for the evolution of your resources and your views about a subject

Quality processes		
Criteria A precise schedule of the work including rules has been established.		
Comment	nent The schedule of the work has to be planned in advance.	
Commitment Documents provided before the enrollment for the teach event are specifying the work schedule, as well as each act commitments.		

A.4 Leading the learning/teaching process

The teacher is leading his own appropriation process and will perform the teaching activity. The tutor helps the teachers to elaborate personalized teaching plans, leads learning dynamics, ensures completion of the teaching events, activates and promotes the participation of the teachers.

1. To help the teachers to elaborate personalised teaching plans: The personal teaching plans help the teachers to express their goals and support needs and also to plan and schedule their activities, while easing their acceptance of promotion to a more active role. The teaching plans should be done individually and summarized on their personnel space.

- 2. To lead the learning dynamics: Besides being an expert on the subject matter, the authors and tutors are the leaders of appropriation dynamics of the resource by teachers. In eLearning the tutor's role as a facilitator is emphasized. One important thing is to find balance in participation. The authors and tutors have to be present without dominating the appropriation process. Their role is to guide the appropriation process in the right direction. Keeping up the dynamics and motivation means observing the teachers' discussions, progress and reports.
- 3. To ensure completion of the teaching event with the teacher: The teachers can need help with the use of the resource and the planning of the teaching event. The tutors support them until it takes place.
- 4. To activate and promote the participation of the teachers: The teachers' and learners' participation can be promoted by questions and arguments.

Best practice	Keywords	Description
Meta-guide for teaching plan- ning in a virtual context	supporting teach- ers self-regulative learning skills, elaborating the learning guide, promoting col- laborative work, teamwork, peer- teaching	This resource facilitates the planning of the use of resources and of the server. It helps the coordina- tor of an area plan with the authors that produce resources in that area. It entails the planning of learning support for the teachers, basically facilitat- ing self-management and self-monitoring in the pro- cess of knowledge building throughout the use of in- teractive geometry. This underlying principle forms the basis for the creation of learning guides, which are published in a given area or attached to a re- source, as a web document.

Deliverable D6.1 Quality Assessment

Best practice	Keywords	Description
Teachers assess- ments	Teachers using a resource fill in an assessment questionnaire at the beginning and at the end of each course. More- over they express their opinion on their teaching achievements, exploitation of technological devices, users support, quality of materials and other issues in the forum.	This tool can be used by authors and other educa- tional managers to track teachers' opinion and over- all resource quality. Teachers develop abilities of self- regulation and become more conscious and reflective on the use of the resource in their teaching (achieve- ments and lacks on their individual and/or group work). These questionnaires will be used as evidence to report overall quality of the resource in order to rank resources. Educational managers, authors and teachers will as well use these results to make deci- sions that improve the current or following resources. They can make decisions as to how improve techni- cal and/or pedagogical aspects of the resource and identify needs for new resources or subjects.

A.5 Feedback and evaluation

The a priori assessment of the resource, as well as a self-observation evaluation grid help the teacher to understand what to look for during the teaching event. The grid can as well be used by an external observer. The assessment tool is the questionnaire defined in Sec. 6. The teachers use as well the forum or the chat tools to ask questions and give feedback.

The author and the tutors react upon the teachers feedback, in particular their quality assessment giving useful feedback, alterations and improvements, for instance to correct misunderstandings, to bring complementary information or simply to encourage and motivate him/her. The author is responsible for the final evaluation of the teacher.

- 1. To use instruments for continuous assessment: Information about users' activities are recorded. The users should be aware of what kind of information about their activities is recorded and how they are used in the evaluation.
- 2. To give feedback: When the focus is on the teacher' individual course to teach, it is useful to give personal feedback to every teacher, but when the group work is emphasized, the tutors can give feedback to the whole group at the same time.

It is important that the teachers get feedback during the appropriation period, not just after the teaching event. Especially with a new subject or with new working methods, continuous feedback is important for ensuring the teachers' progress. The feedback must be reasonable and constructive. The feedback must be unambiguous, and the teachers should have a possibility to ask specific questions regarding the feedback.

3. To assess the teaching event: Analyzing the feedback of the teachers, evaluating their progress and appropriation and taking into account their teaching reports is the main source of information about the quality of the resource.

Best practice	Keywords	Description
Feedback re- garding ongoing courses	Feedback	It is useful to give and ask for feedback regularly during the planning of courses, from the enrollment of a teacher to the actual taught course, when it still can have effect on teachers use of the resource. The feedback should be constructive which aims for the progression of the quality of the use by enrolled teachers and their appropriation of the content of the resource.
Feedback tools should be suitable for situation	Feedback tools, e-mail, discussion forum	You can use different kind of tools for feedback. An- alyze the situation and decide what is the suitable tool for that situation. To motivate the whole group: publicly in discussion forum, to contact teachers in case of falling behind: privately by e-mail.
Individual feed- back	Feedback, individ- ual, group work	Even though resource building and use is based on group work, users should be treated as individuals when given the feedback. They should also have pos- sibility to say their opinion about the group work.



Quality processes			
Criteria	Criteria Teachers' progress is being continually assessed.		
Comment	The authors and tutors have to be aware of most problems that can occur during the teachers' appropriation and teaching event using the resource.		
Commitment	Periodically ask for feedback to evaluate the teachers' progress		
Indicator dur- ing	provide means of assessment at regular intervals		

B Main activities of the tutor

A tutor is a mediator between an author and the teachers that use resources. This means that the tutor should be aware of the teachers' progress, needs and problems to pass this information to other actors. The line between the tutor and the author can thus be hard to draw, depending mainly on the repartition of roles. The tutor works more on the teachers' terms. The tutor's role has more to do with helping the teachers in situations that occur during the appropriation and teaching event. This is done by first analyzing the situations and then reacting to them. The author is always related to the subject matter. Depending of his/her responsibility in monitoring forum discussion for instance, the tutor is not necessarily top competent in the subject matter of the course. It is recommended to facilitate communication between authors and tutors working with the same resources.

We detail here the workflow associated with the main activities of a tutor helping fellow teachers using a resource. It is the next step as the user of a resource. It is a minor adaptation of the workflow defined in the e-Quality project. We detail each activity with its best practices and the quality criteria it leads to, once again lightly adapted from the e-Quality project.

B.1 Encouragement to interaction and to collaborative work

Interaction and collaborative work have to be encouraged to facilitate learning and support the motivation of the teachers. Interaction will maintain the contact throughout the appropriation and the teaching event. The tutor has to promote the forming of groups. Interaction continues after the course report to allow for the improvement of the resource. At the appropriation stage, teachers enrolled in the use of a resource are in effect learners.

- 1. To manage problems or conflicts: The discussions between the learners in a large group can be exhausting and hard to control. The forming of the smaller groups and group work in general is emphasized in distance work. In the face-to-face situations the group is often formed subliminally, without extra effort. This means that by chatting with other learners in the classroom and by subtle gestures learners form a group. In other words just by entering the classroom the learners become members of a particular group. This is not the case in distance work where the learners are usually present to others only by writing or participating in action. That is not to say that in a face-to-face situation a good atmosphere and the sense of group exist automatically, but in the virtual learning environments tools are needed for it. If face-to-face -meetings are not included, it will be useful to spend time for introductions and to become acquainted with other learners and the learning environment.
- 2. To promote interaction and cooperative work among the users: The tutor's role is to activate and guide the teachers in the participation in interaction. Productive discussions require activeness from the participants. The discussions do not happen without a reason or an impulse. The topic or theme of the discussion should be interesting and thought provoking. The tutor should monitor the discussions and intervene if needed. The tutor can act as an example on how to communicate with each other. Messages can be argumentative or provocative to instigate the discussion, but respect towards others is expected.

The tutor guides the forming of groups and their work. The tutor has to understand the special characteristics of eLearning with their requirements for group work and socialization. Group work in the virtual learning environment needs extra guidance and support to succeed. Special attention should be paid to forming the groups in order to promote co-operative and collaborative learning and genuine sharing of expertise. The groups should be able to organize their work collectively to increase the commitment and responsibility of the members. The groups should be in charge of their work. Of course this can be supported by instructions for working, roles inside the groups or by questions to the group. The groups may be obliged to report about their work. This helps tutors and managers to analyze the needs for support but it also helps the teachers to observe their work. Monitoring discussion on forum or chat and answering teachers' questions depend on the sharing of responsibility between tutors and authors on subject matters.

3. To promote functional interaction between the teachers: The capacities of different interaction tools should be taking into account. For example, the discussion with the help of asynchronous tools (forum) requires more time than with synchronous tools (chat), but because of slow pace it can be more in-depth. The use and schedule of the interaction and discussions should be well planned to meet the needs of the present stage.

Deliverable D6.1	
Quality Assessment	

Even though teaching is in focus, all interaction does not have to be related to the subject at hand. Social interaction should be encouraged. There will be, for example, a chat-forum to facilitate unofficial discussions. Didactical experts will be asked to conduct research on the animation and coordination of groups, the Institut National de Recherche Pédagogique (INRP) has plans in that direction.

Best practice	Keywords	Description
News group and forums	Dedicated for a group of people using the platform to maintain firm communication channel.	The easy way to communicate with group of users is forums and news group a.k.a. mailing lists, sending e-mail to all users enrolled in a particular resource or subject, based on the multicast mode in secure way. Users can opt in and opt out of a given subject. In addition, all e-mails are stored in searchable data base and organized by subject threads. Messages can be sent through usual email software or online through the forum interface attached to a resource.
Tutors participa- tion balanced with learners' needs	participation, in- terference	The author's and tutor's participation and interfer- ence, for example in discussion, should be in balance with the teachers needs. Too much interference can smother the conversation. Situational sensitivity is important to get the best improvement suggestions.

Best practice	Keywords	Description
Support in form- ing of the groups	Group works	If there is a group work around a resource, the form- ing of the group should be supported. There should be time and tools for group to get to know each other, and discuss the work to be done. Tight group helps focusing.
Roles in group work	Role, group work	The users are supported to take on different roles in the group. Roles can change, casual user, enrolled teacher, tutor, author, course manager. Everybody is involved and in charge of work and is entitled to get rewarded by a promotion to a more prominent and active role.

B.2 Motivation

The tutor motivates the teachers. He/she promotes the creation of the community around a resource.

- 1. To motivate the teachers in appropriation: The need of technical support is so evident that the support of other aspects of the learning process is sometimes forgotten. eLearning is based on the concept of a self-directed learner. This does not take away the fact that most users still need encouragement and support of a pedagogical nature.
- 2. To promote an atmosphere that supports appropriation and participation: The responsibility of the tutor is to create a positive atmosphere around the resource. This motivates the teachers to cope better with possibly forthcoming problems. Even though the tutor is not necessarily in charge of creating and designing the resource, s/he should be aware of the goals to support the teachers in achieving these goals. Besides personal support, there are other ways to promote the teachers' motivation. One is to give teachers a possibility to choose between alternative teaching paths, that is to choose between materials, themes and activities. Activating elements, like forum discussions, group work etc., and regular feedback are also ways to motivate the teachers. The teachers' commitment to the resource is increased by allowing them the power of decision. This can be collective negotiation of the rules, evaluation and learning objectives.
- 3. To make the teachers feel part of the educational community: The main objective of the tutor is to promote the creation of the learning community. Sometimes it is formed naturally, but the teachers may need encouragement. Various methods, like informal chat discussions, group activities and introductions can be used, but the most important thing is to encourage the interaction between the teachers. The tutor acts as a facilitator of a learning community which is not controlled or managed by a tutor, but which is operated by the participation of the users. The tutor has to communicate this to the teachers. At the beginning the tutor may have to participate more to activate the teachers, but s/he has to remember to move to the background when the teachers take on the discussion. Too enthusiastic interference can also cause passivity. A balance is emphasized.

Deliverable D6.1 Quality Assessment



Best practice	Keywords	Description
Motivating the in- teraction	motivation, dis- cussion	Authors and tutors should plan the discussions well, so that the use of a resource is motivating for teach- ers.
Chat-tool for quick conversa- tions	interaction, moti- vation	Chat is a tool for synchronous interaction, so dis- cussions takes less time than in discussion forums or with e-mail. Chat is useful for quick discussion, like for decision making, planning or for motivating group. It helps build a sense of living community and not a dead server. It can also be a place for non- subject related discussions, like for getting to know the group, which usually motivates users.
Group work should be ob- served	Group work	The group work should be observed by tutor or au- thor. There can be undemocratic atmosphere, that can refrain creativity and improvement. The group work is intervened in case of a conflict or a problem. Didactical research groups should be invited to study relationships and group dynamics on the INTERGEO platform.

Quality processes		
Criteria	The teacher's motivation is stimulated, adequate guidance is provided when needed and actors collaboration is encouraged.	
Comment	The teachers' motivation and interest has to be kept at the highest possible level, in order to maximize the efficiency of the teaching/learning process.	
Commitment	The tutor is aware of the importance of continuously maintain- ing, even enhancing, teacher's motivation, providing adequate guidance and promoting collaboration, and is ready and well prepared to this task. If necessary, additional training or sup- port is prepared for the tutor.	

Indicator be- fore	The coordinator checks tutor's skills and experience
during	assessment tools have to be provided to the teachers
after	Teachers questionnaires
Indicator be- fore	The coordinator checks tutor's skills and experience
during	assessment tools have to be provided to the teachers
after	Teachers questionnaires
Indicator be- fore	The coordinator checks tutor's skills and experience
during	assessment tools have to be provided to the teachers

B.3 Guidance

after

The tutor offers guidance if needed. The tutor is involved in the relations, interaction and individual situations in the learning/teaching process.

Teachers questionnaires

1. To offer guidance if needed: The atmosphere around a resource should be created so that it is easy for the teachers to ask for support. The tutor should show attentions to the teachers' activities and progress. Even though the resources uses are flexible regarding time, the teachers cannot expect support to be available 24 hours a day. Therefore it is important to make rules for the support as well. Usually the time spent on tutoring is bigger than estimated, but sometimes the time spent on the motivation of the teachers in participation and promotion reduces the time needed for the guidance.

It is important to let the learners know right from the beginning what they can expect from the tutor. The tutor should let the learners know how soon they can expect answers to their questions, how they are expected to contact the tutor, what is the tutors role in discussions etc. The tutor's time resources should be taken into account when planning the working methods of the course. For example, one way to ease the tutor's workload is to assign the learners to take responsibility of discussion by rotating

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the role of a moderator amongst the learners. Learners are aware of the sharing of responsibility between tutors and teachers.

2. To deal with questions about the resource: To answer questions about the resource or to transfer the addressed questions to the right person (i.e. questions about managerial or administrative issues)

Best practice	Keywords	Description
Quick tutor's an- swer	answering time	The delay between a participant's question and the tutor's answer must be short to facilitate appropriation and to increase the user's confidence
Time to answer	A reasonable time to answer a user's question on mail or forum, advised for tutors and au- thors	Tutoring being voluntary, no maximal answer time is guaranteed, but responsibility on the side of authors and tutors is fostered. Users, tutors and authors are informed at registration time that a question asked by users should be answered in a reasonable time, about a week outside vacations.
too much inter- ference should be avoided	encouragement, interference	Tutors and authors should lead the discussion around a resource without suppressing the opinions of teach- ers and users but encouraging constructive reports. Critics should not be taken personally by authors but thought of as improvement guarantees therefore encouraged.

Quality processes			
Criteria	Teacher's questions have to be answered in a reasonable prede- fined amount of time.		
Comment	To avoid teachers' lose of motivation, answers to asked questions must be provided in a reliably quick manner.		
Commitment	There is a predefined maximal amount of time for answering a teacher's question, and the tutors commit to not exceeding that time before answering questions.		
Indicator be- fore	Time to answer has been defined beforehand		
during	Automation of reminders in case of delays		