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Best Practices for Using Conditional Release in Online Classes

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Abstract

With advances in online course delivery methods, teachers have a variety of options to control the release of course content based on specific criteria. Despite the availability of such conditional release tools, no best practice recommendations are available to guide the implementation of these tools. In this paper, we define the concept of conditional release, review relevant literature, report a series of case descriptions and lessons learned from courses where conditional release was used, and generate a list of best practices for the use of conditional release. These recommendations provide teachers and course designers with guidance regarding the use of conditional release tools. Implications for course design, delivery, and research using these tools are also discussed.

Best Practices for Using Conditional Release in Online Classes

With the development of comprehensive course management systems, online teachers have a wide variety of course design tools at their disposal, including optional tools providing the ability to release course content based on specific criteria. At its simplest level, *conditional release* refers to efforts to make course content available based upon specific student behavior, activities, or achievements. In particular, with these tools, teachers can make the release of course material contingent upon students meeting a particular condition or reaching a predetermined criterion. When a general behavioral condition is used (e.g., requiring students to open a file or complete a self-introduction), the teacher is using *action-based* conditional release. When teachers base the release of content on students' meeting criteria (e.g., reaching or surpassing a specific grade level for a quiz), this is *achievement-based*. Conditional release can be differentiated from *controlled release*, in which the opening of course material is controlled entirely by the teacher with no conditions based on student actions or achievements.

When used properly, conditional release of material allows teachers to build flexibility into the delivery of their course content, better control or manage the pace of their students through the course, and implement scaffolding to support students as they progress through the course. In this paper, we (1) provide an overview of the conditional release concept and how it relates to other pedagogical approaches; (2) describe several case examples from online teachers who have used conditional release in their courses; and (3) generate a set of best practice recommendations based on these online pedagogy and case experience considerations.

Existing Guidelines for the use of Conditional Release

Course management system developers and some universities have provided general guidelines for the use of conditional release tools. For example, Desire2Learn (n.d.), a course management system that markets itself as offering personalized learning with enhanced learner engagement and collaboration, provides the following description of its conditional release tools:

> *Instructors can determine when learners (or other roles) can access specific content, discussions, assessments, dropbox assignments, news postings, checklists, surveys, and other learning tools. Release of resources can be based upon results/usage of: time/date, checklists, discussions, quizzing, self-assessment, content, dropboxes, group membership, content progress, learning style preference, and more.*

In a Teaching Guide for using Desire2Learn (Desire2Learn, 2006), teachers using conditional release were advised to avoid circular references, unnecessary conditions, and impossible and contradictory conditions, and to establish conditions before students access the course.

Another course management system, Blackboard (n.d.) boasts flexibility in managing content, engaging learners, and assessing outcomes, and describes its tools as "adaptive release" options. In one of its press releases, it notes that "[t]hrough the use of Adaptive Release,…instructors will be able to control, monitor and create assignments according to their evolving student assessment and criteria."

Deakin University (2011) in Australia has provided a list of several reasons why a teacher might use conditional release. These reasons include ensuring that students read specific course content before they move on to more content, attempt to complete a quiz, or submit an assignment to the dropbox. Conditional release also can be used for specific tasks such as requiring students to post to a

discussion forum before being able to access more content, having students complete a checklist before submitting an assignment to the dropbox, or releasing news items only after students have met certain conditions. The authors of these guidelines also suggest that a teacher "reflect on whether you are overusing release conditions, using them punitively or for valid learning reasons, using them so they confuse students, using them so that they counter each other making it impossible for students to move, overusing them to the extent that students disengage."

In summary, some general suggestions and recommendations are available for the use of conditional release tools. However, these guidelines do not appear to be tied to specific pedagogical practices or linked to the actual practices of teachers. In the next section of this paper, we discuss issues pertaining to the pedagogy behind the use of conditional release. As we discuss these issues, we will highlight a number of potential advantages and disadvantages of conditional release.

How can Conditional Release Enhance One's Pedagogy?

One excellent reason for using conditional release is to provide *scaffolding* to bolster student success. Scaffolding, by definition, consists of providing direct support at the right level of current skill while a student is carrying out the task and then gradually fading out the assistance (Jarvela, 1995). According to Geert and Steenbeek (2005) this definition has several implications. The first is that there is some identifiable level of a student's skill. Second, there exists a support in the form of help, assistance, instruction and so forth, and third, that this support is close to the student's skill level. Additionally, giving this support should result in the increase in the student's skills and, once this increase occurs, the support can gradually disappear. Finally, Geert and Steenbeek propose support must be "at the right level of the current skill" (p. 117). Therefore, as the level of the current skill increases, so must the level of the scaffolding support. In disciplines where the content builds on itself, conditional release is ideally suited for use as a scaffolding tool.

According to Brinthaupt Fisher, Gardner, Raffo, and Woodard (2011), the amount of scaffolding and flexibility needed may differ greatly depending on the characteristics of the students in the course. However, teachers in an online course have an obligation to make an effort to determine those needs. For example, achievement-based conditional release can be used when the teacher wants students to reach a designated mastery criterion (e.g., scoring 70% or better on a quiz) before proceeding to the next unit of content. It might also be used to ensure that students demonstrate a particular competency before moving on to the next level in the course. Many teachers in traditional (i.e., face-to-face) classes already employ some kinds of controlled release, such as not making course materials available until a particular date has passed or posting lecture notes or supplemental materials after the class that discusses the topic. Some teachers will provide reviews for tests prior to the exam and post correct answers following a quiz. However, it appears that release of such content is typically guided neither by student actions nor by students reaching specific levels of mastery or competency.

It may go without saying, but conditional release should only be used when specific conditions (either action- or achievement-based) can be applied. The teacher should determine which elements of the course should be conditionally released. Ideally, conditional release can be used to guide students through material helping them to prepare adequately for class discussions, assignments, and assessments. This is accomplished by making the release of content necessary for continued success contingent upon the success students have shown in the preceding levels. Through the use of conditional release tools, the teacher has greater control over content and is able to require relevant material be completed to a certain degree before new content is made available. This prevents students from missing scaffolding that is vital for their success, and it can provide scaffolding where none previously existed.

Another pedagogical concept that is relevant to conditional release is *self-directed learning*. This refers to "an approach where learners are motivated to assume personal responsibility and collaborative control of the cognitive and contextual processes in constructing and confirming meaning" (Garrison, 1997, p. 2). In many ways, it is seen as the ideal form of learning when it is a collaborative process between teacher and student (Garrison, 1992).

Self-direction is a matter of degree. It can range from an unstructured environment where students form their own learning goals and assessments of learning (with teacher input) to a more structured environment where teachers provide the course resources and scaffolding with the students progressing through the course at a flexible pace (with some or no deadlines). However, it can be difficult to determine the degree of autonomy needed to develop personal responsibility combined with success (Garrison, 1992). Ultimately, online learning calls on learners to be self-directed and assume greater control than they may be used to in managing and monitoring the learning process (Song & Hill, 2007).

Most of the emphasis in the research on self-directed learning has been on external control and facilitation of students' self-management of their learning (Garrison, 1997). One of these external control functions is flexible pacing. Such pacing is typically viewed as a hallmark of the online learning environment, to the extent that it aims for a collaborative learning experience at the students' convenience. Self-paced learning implies solitary, on-demand learning at a pace that is managed or controlled by the learner (Singh, 2003). Completely self-paced movement through a course has both advantages and disadvantages. While it allows students to move at their own pace, it sacrifices or makes less likely the development of a sense of community among the course's participants and may inhibit communication among classmates. In cases where the teacher prefers that students move through the

course together (e.g., when class discussions are desired), self-paced learning would be more difficult to implement.

Recognizing that students can fall behind in any course, regardless of delivery mode, conditional release can be used to provide a mechanism to help students recover more effectively if they have fallen behind in the course. It can prevent students from taking an assessment for which they have not adequately prepared. Achievement-based conditional release that is coupled with flexibility of due dates allows or requires students to complete content first and then proceed with the assessment. Requiring the student to prepare for the assessment should increase the likelihood of student success.

If a teacher uses it wisely, conditional release can encourage and facilitate self-directed learning in students. Ideally, conditional release can be used to help unprepared students prepare adequately for class discussions, assignments, and evaluations. It can also be used to encourage uninvolved students to become more involved and engaged in the course. On the other hand, conditional release requirements might work against students' self-directed learning efforts. For instance, conditional release may make it more difficult for students to manage their time and schedule their studying sessions compared to if they are progressing through the course at their own pace.

A third instructional approach relevant to the use of conditional release is *differentiated instruction*. This approach, popular in K-12 classrooms, emphasizes individualizing the curriculum to fit student abilities, interests, and knowledge rather than requiring students to adjust to the curriculum (Hall, Strangman, & Meyer, 2003; Huebner, 2010). Once it is clear from where students are starting, teachers can guide them through course content, learning activities, and further assessments that are geared to their levels (Tomlinson, 2008; Tomlinson & Kalbfleisch, 1998). As long as there are some

online aspects of the course, conditional release tools are well-suited to differentiated instructional efforts.

Conditional release might be used to conduct differentiated instruction in college courses. For example, in a dual-enrollment course, the teacher could provide release criteria for specific activities and assessments for undergraduate students and a different set for graduate students. Conditional release tools could also be used to guide under-performing students to remedial activities before progressing in the course, while directing stronger students to more challenging activities and assessments. More generally, conditional release could present individual or groups of students with branches that will lead them to different content based on their actions or achievements. Alternatively, courses could be set up so that students' content, activities, and assessments can be individualized at several points in the term. In these examples, the release conditions can be based either on students' achievements or actions.

As reviewers have noted (e.g., Tomlinson, 2008), the implementation of differentiated instruction in the traditional classroom can be a complex process. Creating online conditional release options that are based on this approach are also likely to be complicated and time-consuming for the teacher. Teachers might also need to modify or remove certain aspects of the course (e.g., content discussions that all class members participate in at the same time) if they decide to differentiate their instruction along these lines.

A final area of pedagogy concerns how *online best practice recommendations* relate to the use of conditional release. Bain's (2004) study of outstanding teachers challenges traditional notions of best practices. Rather than creating a "to-do" list, Bain focuses on teacher attitudes, beliefs, and behaviors that influence student outcomes. Brinthaupt *et al.* (2011) review Bain's book in the context of online

teaching and learning and identify three important factors: (1) *Fostering student engagement* or creating effective student interactions with faculty, peers, and content; (2) *Stimulating intellectual development* or challenging students to think critically and reevaluate previous knowledge, beliefs and assumptions; (3) *Getting personal with students*, which includes behaviors such as demonstrating and encouraging trust and potential in students, flexibility, self-directed learning, communicating learning and success intentions to students, and conveying realistic goals and expectations.

Conditional release should be designed so that it contributes directly to these three best practice areas. Many course management systems, for example, support online discussions that can be leveraged to achieve those goals. Online messaging boards, discussion forums, chats, and blogs are all tools designed to foster student engagement with peers and course content (e.g., Grandzol & Grandzol, 2006). Faculty should emphasize them as opportunities for students to build a community where they can learn from each other, help one another in tackling challenging course content, and provide a support system for each other. These systems can be merged with action-based conditional release, requiring students to engage with the course, the students, and the teacher before they can advance to subsequent course content. Achievement-based conditional release should be implemented in ways that will foster student engagement and stimulate their intellectual development.

In summary, scaffolding, self-directed learning, differentiated instruction, and online teaching best practices all are relevant to the strategic use of conditional release. Poorly-planned or -designed conditional release is likely to hurt student learning, require increased time and effort on the part of both students and teachers, and negatively impact student evaluations of teachers.

Case Studies of Online Courses Using Conditional Release

In this section of the paper, we present four case descriptions of online courses where teachers utilized conditional release. These cases, all drawn from our own campus, represent a variety of

disciplines and student populations and reflect varying degrees of success in the use of conditional release tools. The cases illustrate why and how the teachers used conditional release, as well as the effects of those efforts on student performance.

Conditional Release in a Transitional Algebra Course. One course that has successfully used conditional release of content is an online version of a transitional college algebra course. This course fulfills the mathematics general education requirement by covering all of the traditional college algebra material along with supplemental material to help underprepared students be successful in college algebra. The course was originally developed as a traditional face-to-face class and then redesigned as a conditional-release online class. Content is presented through teacher-created video lectures. Students are required to take a proctored, comprehensive pencil-and-paper midterm and final exam. All other exams and all homework are completed online using the MyMathLab (n.d.) course management system. Recognizing that many students who enroll in online classes do so because they have unusual schedules or family situations that prevent them from taking traditional classes, the developer decided that student flexibility and a self-paced course with material released as the student progressed through the course best served this particular at-risk student population.

Since this is a mathematics course, not a time management course, the teacher decided to place more value on mathematics that is done well rather than work that is simply completed on time. Deadlines are provided to guide students through the course so that they finish by the end of the semester. Most students meet the deadlines and have no trouble keeping up with the workload. However, in the event of a missed assignment, material is reopened with no penalty. Many argue that flexibility of deadlines does not prepare students for the real world. While this argument has some validity, one might also argue that in the real world an employee can use a sick day, bereavement time, or personal leave if a life event occurs. We should not assume that our students will never encounter a life event during the course of a semester.

A concern of the course developer was that, without flexible deadlines, these at-risk students might have a life event or procrastinate and then attempt a quiz for which they were not adequately prepared in an effort to meet a deadline. The goal of conditional release is to prevent this from happening. In this class students were required to move through the course material in an orderly fashion and with a level of success that was at least the minimal level to pass the course. Students could access the first homework set when the course opened. They were not allowed to proceed to the next set of homework until they had attained a score of at least 60% on the previous homework set. In this course management system, homework problems are algorithmically generated and can be attempted until the student successfully completes the problem, so there is no reason that a student cannot score at least 60% on the homework and move on in the course. Students also cannot access the quiz covering a chapter of material until they have completed the homework for that chapter. If a student misses the deadline for a chapter quiz and contacts the teacher to reopen it, the requirement is that the student completes the homework for that chapter first. When that is done, even though it is late, the homework grade is counted and the quiz will be reopened with no penalty. Students are rewarded with the grade that reflects their knowledge of the material. They are also reminded at this time that all material must be completed by the end of the semester or they will receive an F for the course.

This flexibility works very well for some students who would not succeed in the traditional version of the class. Some specific examples of this are described next. Several students in the online conditional-release class have deployed for military service during the semester. For these students, there are usually a few weeks that they are unable to work on the course at all. However, once they are settled in their new location, they can pick up where they left off and complete the course with all the content released as they proceed, while serving their country overseas. In a traditional face-to-face class, they would have generally withdrawn from the course and retaken it when they returned from deployment.

Other students have opted for the online class when pregnancy is involved. A student with a due date that falls mid-semester may work very hard to get ahead in the course. Since material is conditionally released this is not a problem. When the child is born they may take a couple of weeks off and then proceed with the class. Other times if the due date is close to the end of the semester, the student may decide to finish the course early so that it is completed before the baby is born.

One student worked on an oil rig while taking the online class. Homework and testing was very sporadic based on the work schedule of the rig. There would be several days when no work at all would be done on the course, but then would come a gap of time when the student would be able to focus on the course and complete substantial amounts of homework and quizzes and continue the course. The proctored midterm and final exams were given a local university to ensure integrity.

Some students prefer the online course simply because they do not feel rushed. They can view the videos at their own pace and re-watch them if it would help with understanding the material. Homework and quizzes can be completed when students are most rested and able to best concentrate on the material based on their schedules. If an unexpected event occurs, students in courses with conditionally released material may be able to recover in the course and succeed better than students who have simply missed the material in a traditional course.

There are a multitude of reasons that students choose an online class and remain in it when they learn of its conditional release components. Regardless of these reasons, initial research indicates that there is no statistically significant difference between the performance of these students and their counterparts in traditional face-to-face classes.

Conditional Release in an Agricultural Economics Course. Agricultural Economics is a required course for all students in the School of Agribusiness and Agriscience on our campus. Like many economics courses, this one makes heavy use of mathematics. Assessment is primarily based on online quizzes, which can be repeated, and exams, which cannot. Exams and quizzes draw from the same

question database. The quizzes are thus study tools for the exam. During previous offerings of this course, both online and face-to-face, the teacher noticed a strong correlation between exam grades and quiz grades. In previous online classes the teacher noticed a pattern among low performing students. Many would procrastinate, waiting until the section deadline to complete all of the section quizzes and the section exam. Only in rare occasions did this strategy result in success.

When conditional release was first employed, the intent was to guide students toward a successful outcome by reinforcing the importance of continually engaging with the course material and practicing quizzes in order to prepare for exams. Course material was delivered in the form of online video lectures created from narrated PowerPoint slides. After viewing the video lectures, conditional release was used to unlock quizzes. After scoring 70% or higher on a quiz, and viewing the next lecture, the next quiz would be released. After completing five to six quizzes in this manner, the section exam would become available. Each quiz and exam was given a deadline. Students were allowed to drop their lowest exam, so if any students were not able to unlock an exam it would not harm their grade and they would then be granted access to the next course module.

Results were disappointing. The added pressure of performance goals with deadlines served only to maintain a state of panic among high-performing students. Low-performing students were frequently unable to meet the release criteria and procrastination was still a problem. Conditional release served only to increase the severity of the penalty for procrastination or low performance. The teacher's experience was equally frustrating – not only was conditional release not helping students meet learning objectives, it increased his workload. Students who failed to meet deadlines were typically granted an extension, which required entering individual exceptions in the course management system. In addition, after setting up release conditions for quizzes, any modifications to the course content required a revision to the conditional release criteria. The software used to generate the video lectures was

unreliable and many of them had to be revised. Each time a lecture was revised, release conditions within the course management system had to be updated.

The following semester, the use of conditional release in this course was modified. Quizzes within each unit no longer had a deadline, but the unit exams did have deadlines. The performance threshold was lowered to 50%. Results were dramatically different. High-performing students could easily reach the 50% threshold and no longer expressed anxiety about course deadlines. Low-performing students, even those who were prone to procrastination, could complete the work and make progress in the class. The pass rate for the course was dramatically higher than the previous offering. Although viewing lectures was no longer required to access quizzes, this did not appear to create problems. Students tended to move through the course in a linear fashion and could match content topics to quizzes without being micromanaged by the course management system.

The original goal of implementing conditional release was to provide additional motivation to low-performing students. This was not an effective use of conditional release in this course. It appeared that the behaviors associated with low performance could not be modified with a computer program and were often the result of factors that are external to the course itself. Conditional release, designed as a motivational tool, served as an additional punishment for students who were struggling to complete the requirements of the course. At least in this course, motivating students may be more effective by using the communication tools imbedded in the course management system, such as discussion boards and chat rooms.

Conditional Release in an Integrative Seminar in Leadership Studies. Integrative Seminar in Leadership Studies is a 1-credit, pass/fail independent study course that provides an opportunity for students to identify their personal leadership strengths, understand how their strengths apply to their

leadership experiences, and develop a personal profile that embodies their unique talents, leadership education, and leadership experiences.

Course requirements prompt students to (a) build an awareness of their strengths by identifying times that they are "in the zone" or at their personal best; (b) identify their strengths with the StrengthsFinder assessment (Gallup Inc., 2011) and describe them in their own words; (c) describe their signature themes and how they currently use them; and (d) identify how they can foster and hone their strengths while in college and beyond in their career. Because this class is designed to be independent study that encourages originality and personal development, students are required to be self-directed learners. Success in this course is not merely a passing grade. Success is a heightened self-awareness in the students as leaders and what they uniquely can contribute in making a difference on campus, in the community, and in our world. These goals make the class an ideal match for the self-directed learning process where students may work ahead of schedule and complete the class as their time permits. However, because each assignment builds on the previous assignment, it is imperative that students progress through the class in a specific sequence.

This sequential approach necessitates that student learning be process-oriented, rather than product-oriented. Each assignment is deliberately designed to lead students through the process of thinking about when they are at their personal best, then identifying their leadership strengths, followed by making connections with experiences, and finally integrating them into a culminating document they can share with others. The teacher used conditional release as a tool to compel students to be process-oriented and complete an assignment before moving on to the next assignment (to prevent students from jumping around, completing assignments randomly, and most importantly, moving ahead without the professor's feedback on the previous assignment).

Conditional release can cultivate a process-oriented emphasis in learning. However, when the progression in the course is obvious and the readings and deadlines are clearly ordered, it would be highly unlikely that students would progress out of sequence. In such as case, conditional release can become a tool that is used just because it is available rather than because it serves a real need or has an essential function. In this case, the teacher incorporated conditional release into the class because it was an available tool that would ensure sequential progress. However, the teacher found that the tool was not essential or even useful for this purpose. At least for this course, using conditional release solely for sequencing purposes was unnecessary.

Conditional Release in a Liberal Studies and Professional Studies Culminating Project. The capstone experience for Liberal Studies and Professional Studies majors on our campus is a Culminating Project class. The majors are geared toward adult students who are returning to college to complete their degree. Students are able to propose either an argumentative research paper that is related to their chosen course of study or a professional project that must also tie to their previous coursework. At the end of the course, students create a multi-media presentation to summarize their culminating project experience. Students take the Culminating Project in their senior year. Since this is an online degree program, the course is offered in both online and hybrid delivery.

Several sections of this senior-level culminating project online course implemented conditional release to improve the students' performance in the class. After two semesters, the conditional releases were removed due to teacher feedback that it had not improved student performance and had created confusion for some students.

The culminating project class requires that students begin with a proposal that outlines what tangible professional product they will produce related to their area of study. Teachers were interested

in implementing conditional release in order to improve the quality of the proposal and ultimately the final student product. In order to ensure that students had a quality proposal before moving forward with any other assignments, a conditional release was placed on the proposal that required students to earn 80% of the points before they could submit their next assignment. Multiple submissions were allowed of the proposal until the student reached 80% of the points. The idea was that students would be forced to refine their proposals until it was above average or received a grade of 80 or higher. Before conditional release was used, the students would submit the proposal and regardless of the score proceed with the next assignment. In addition, the students could not see the next content module until they earned 80% of the points on the proposal assignment.

Setting the minimum grade at 80% created a situation where some students were not reaching the release criterion but were still capable of completing the final project with a passing grade. Teachers were not sure how to handle these situations and in most cases accepted the proposal with less than 80% of the points, so that the student could proceed to the next assignments. This in effect defeated the purpose of the conditional release. In other cases when the teacher continued to require multiple submissions of the proposal until students received the minimum grade of 80%, the students experienced difficulty finding enough time in the semester to implement the project. Having students in the same course progressing at different paces was also unique, uncomfortable, and created extra work for some teachers.

Since this is an online class, there was also the feeling that a lot of information in the content modules was overwhelming and that students would be able to focus better if modules were released upon completion of the previous module. Although the information was discussed in the syllabus, posted on the home page, and discussed at an optional orientation, several students did not understand that conditional releases were being used for the content modules and this also created confusion and

frustration for them. Many did not understand that content was being released at different times based on their progression. Additionally some students would not login regularly enough to see that action or revision was required on their part.

After two semesters of using conditional release for assignments and content modules, the conditional releases were removed from the course. Teachers still require students to revise their proposals as necessary before approving the proposal, but a minimum score of 80% is not required and students are able to see all the content on the first day of class and work on the next assignment regardless of the grade they earn on the proposal.

Recommendations for Conditional Release Best Practices

Based on a review of the relevant literature and the experiences of the case examples we collected, we have generated a list of conditional release best practice recommendations (see Table 1). In this section, we provide a rationale and justification for each of these recommendations, consistent with the online pedagogical principles and best practices discussed earlier.

(1) *Conditions for release should be reasonable and realistic*. In the real world every student cannot be expected to perform A- or B-level work on every assignment. We recommend allowing students to advance with D-level work. There are a couple of reasons for this recommendation. First, 60% or better on an assignment or assessment is typically a passing grade, even if minimally so. Preventing students from progressing through the course when they have achieved a passing grade is problematic and likely to generate student challenges or complaints. Second, setting conditions that are too high or difficult can engender anxiety and frustration in students. Students may need to complete the trigger assignment more than once. If this is not related to mastering the material, then it is a wasteful and unnecessary requirement. Speaking metaphorically, teachers might think of conditional release as paper walls instead of brick walls. Picture a football team running on to the field, bursting

through a giant banner. Any player can break through that barrier if they will just try. If it was a brick wall, the game would be over before it started.

(2) *Conditional release is best used with activities or assignments that lead to the mastery of course content.* That is, conditional release seems to be better suited as a "guidance" tool than an assessment tool. Teachers can use and justify conditional release tools as necessary to ensure that students are adequately prepared for the major assignments and assessments that "really count." This can include individualizing content, activities, and assessments so that they are tailored to the skills and preferences of the student. Implementing release conditions for trivial materials or activities that are not clearly tied to mastery of the course content (such as learning how to navigate the course management system) is likely to generate frustration in students. When implemented properly, conditional release will increase student interaction with the course material, which will improve student learning.

(3) *Conditional release is best used when course content progresses linearly or builds on itself.* In particular, conditional release can be optimized when mastery of later course material requires the mastery of earlier content. Our general rule here is that, if the course content (reflected in textbook chapters or course modules) can be moved around or presented in different orders without negatively affecting student learning, then conditional release is probably unnecessary. Requiring release conditions in this case would create unnecessary barriers for students and extra work for the teachers. If, however, there is a specific sequence that is required for student progress through the course (e.g., in terms of the development of core knowledge or skills), then teachers and students can benefit from the effective use of conditional release. There can be more than one sequence, if the course is taught in a differentiated way that allows students to reach the desired outcomes in a variety of ways.

(4) *The reasons for using conditional release and for using specific release criteria must be transparent and clearly communicated to students.* Because conditional release is likely to be a new concept for many students, teachers must explain the logic and reasoning behind the use of these tools. Whether the release conditions are based on student achievements or actions or the release criteria are objective or subjective, teachers need to ensure that students understand how they will progress through the course. Particularly with achievement-based conditional release, teachers should clarify to their students why those conditions are necessary. For example, teachers could stress to students that mastery of earlier course material is essential for later course success and that the conditional release tools will actually help students to better navigate the more difficult aspects of the course. In this way, students can use conditional release as a way to better manage their own effort, time, and learning. Additionally, if the purpose of conditional release has been clearly articulated to students, they may be more willing to perform beyond the minimal criteria for release of new content.

(5) *Teachers who use conditional release need to be flexible.* The case examples illustrated the need for and advantages of being flexible when using conditional release. Using conditional release inflexibly (i.e., posting the conditions for release and adhering to those rules without exception) will decrease its effectiveness. Depending on the nature of the course and as well as the characteristic of the students, teachers may need to alter or adjust their conditions or deadlines, as the course progresses. It also may be necessary to add conditions to or remove them from particular aspects of the course or grant individual students deadline extensions. In other words, we recommend that teachers who use conditional release, particularly for the first time, need to approach its usage with the expectation that specific release criteria or actions may need to be adjusted. If the teacher is not flexible, the use of conditional release can create barriers or penalties that are unrelated to student learning.

(6) *Conditional release is best used with caution*. Student learning should be the determining factor with the use of conditional release. Until the effects of using the tools on student behavior and

learning are clear, it is probably best to begin using conditional release sparingly. We recommend that teachers target the course content that is most critical for ensuring mastery of material or class success and apply conditional release tools to that content. Each teacher should determine the best balance of conditionally-released content in the course. This could range from the entire course being conditionally released to certain activities or topics being released after specific criteria have been met. Using too much or too little conditional release may decrease its effectiveness in the class. Some students may react negatively to the imposition of conditions for progress through the course, feeling that their progress is being "over-managed." They may become frustrated if course material is hidden from them. Some of the case examples reported earlier applied conditional release when it was not necessary or in ways that made student progress through the course more difficult. Had those teachers introduced conditional release more gradually or selectively, they might have experienced better success with the tools.

Implications for Course Design, Delivery, and Research

In this paper, we have attempted to connect the use of conditional release with broader pedagogical principles. Considering when and how to apply conditional release can be a very useful exercise for teachers designing an online course. Depending on the course learning objectives, teachers may identify areas where mastery of content is required before progressing to new material. Such points seem ideally suited to the use of achievement-based conditional release.

Really, we are talking about a different approach to teaching. Through the use of conditional release tools, the teacher can take a more active role in guiding or pacing students through the course. Regardless of the desired nature of progress through a course, conditional release can be used to facilitate that process. This contrasts with the traditional model where students come to class whether

they are prepared or not, students are free to devote as much or as little attention to a course as they please, and the teacher has no idea how engaged a student is in the course until the first major assessment.

Conditional release cannot always be used to ensure that students read course content. It might only ensure that students have accessed specific content. This is a significant limitation of using action-based conditional release. We would caution against requiring students to simply access or open material in order for additional content to be released. If a teacher wants to use the reading of material (as opposed to simply its access) as a condition for release, then it would be better to include an assessment of that material and to apply a criterion to be reached before additional content can be accessed.

Our recommendations apply to online course delivery. However, conditional release is clearly useful for courses that are delivered in blended or traditional formats. In fact, some uses of conditional release appear to be better suited to specific delivery modes. For example, a common complaint among college teachers is that the students arrive for class unprepared, having not read the material. In a face-to-face class, teachers could create a "pre-class" quiz that requires students to reach a passing grade before coming to class. Failure to reach the criterion would prohibit the student from attending class that day. Or, phrased more positively, reaching the criterion could provide students with a "ticket" to attend class that day. A similar criterion could be required before students can access an online class discussion in a blended course.

The accuracy of the best practice recommendations we have generated awaits actual teaching practice and empirical verification. As more teachers make use of the conditional release tools at their disposal, a database of teacher and student experiences can be generated and used to revise our

recommendations. Given the absence of research on the use of conditional release in online (as well as blended and traditional) courses, there is a clear need for studies that examine teachers' perceptions and experiences using the tools. Additionally, because the use of conditional release may cause disruptions in the "mindset" of students or require adjustments to how they approach a course, research on student perceptions and experiences in courses utilizing these tools would be quite valuable. Such research would be particularly valuable for determining the best criteria to meet a release criterion, ways that students change their study habits, and whether the use of conditional release improves student learning and performance.

As we noted in the beginning of the paper, course management release tools can also be used for the *controlled release* of materials, in ways that are not dependent upon students meeting a particular condition or reaching a criterion. For example, students might be required to read a "getting started" course module to become familiar with the course structure and organization during the first weeks of the term before moving to the major content. Or, students' access to the entire course can be restricted or segmented so that they are not overwhelmed by a large amount of content. Although we have not addressed best practices for the controlled release of content, it seems ideal for an online teacher to determine a combination of conditional and controlled release of course content that will optimize student learning.

It should be clear from our recommendations, that conditional release is best used when it puts students more in control of their learning. As with any other instructional technology tool, teachers need to evaluate to what extent conditional release can be used to help create the "ideal" student. Such a student is active and self-directed and shows more of a "learning/mastery/process" orientation than a "grade/performance/outcome" (see Bolhuis, 2003; Grant & Dweck, 2003).

Are there unintended consequences of using conditional release? Obviously, conditional release should not be used if inhibits students' future learning. Does conditional release negatively affect students' learning orientations? Does the use of conditional release create anxiety or frustration among students? What do students think of courses that employ conditional release tools? These are some of the interesting questions that await the strategic use and systematic assessment of conditional release in online courses.

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Table 1

Best Practice Recommendations for Conditional Release in Online Courses

- Conditions for release should be reasonable and realistic.

- Conditional release is best used with activities or assignments that lead to the mastery of course content.

- Conditional release is best used when course content progresses linearly or builds on itself.

- The reasons for using conditional release and for using specific release criteria must be transparent and clearly communicated to students.

- Teachers who use conditional release need to be flexible.

- Conditional release is best used with caution.