

Making Learning Design Standards Work with an Ontology of Educational Theories

Valéry PSYCHÉ^{1, 2}, Jacqueline BOURDEAU¹, Roger NKAMBOU², Riichiro MIZOGUCHI³

¹ LICEF, Télé-université, 4750 Henri-Julien, Montréal, (QC) H2T 3E4 Canada

² GDAC, UQÀM, C.P. 8888, succ. Centre Ville, Montréal, (QC) H3C 3P8 Canada

³ ISIR, Osaka University, 8-1 Mihogaoka, Ibaraki, Osaka, 567-0047 Japan

Abstract. In this paper, we present an ontology of educational theories their relation to learning design. This ontology takes into account learning design (LD) specifications such as OUNL-EML and IMS-LD at the conceptual level (1), semantic web standards such as OWL at the formal level (2), as well as JAVA standards at the implementation level (3).

This ontology is intended to provide a knowledge base for any IMS-LD compliant authoring systems/LKMS, in order to provide services to authors of LD scenarios. The ontological engineering (OE) has been done using the Hozo ontology editor at levels 1 and 2 respectively.

Introduction

The research presented in this paper follows the initial idea developed in [1] [2] [3], regarding the elicitation through ontological engineering (OE) of instructional design, instruction, learning and knowledge in an authoring system.

The foundations of ontological engineering issues in authoring systems were established in [4] [5], in which we presented (a) a case analysis and (b) the rationale behind it. In (a), specifically, an author assisted by an authoring system or a *Learning and Knowledge Management System* (LKMS) needs to select a relevant learning design (LD) strategy in order to produce a learning scenario. In this case, the author benefits from having access to the theories on which such strategies rely. In (b), we have introduced the rationale for concrete situations in the authoring process that exploit a theory-aware authoring system. In the present article, we propose an ontology of educational theories which describes these theories and their links to the LD, in order to make authoring systems theory-aware. We also discuss the question of having this ontology compliant to e-learning standards in order to provide shareable and reusable services.

Our former research was based on [6] for the representation of the educational theories, and on MISA [7] for that of the learning design process. Recently, in order to enhance and complete these representations, our work has been further inspired by the following: the Open University of the Netherlands' Educational Modeling Language (OUNL-EML) [8] and the IMS Learning Design [9] (IMS-LD) specifications.

In section 1, we give an overview of related work and e-learning technologies standardization efforts. In section 2, we discuss the needs/requirements of authors/learning designers, and the services that an appropriate system could provide in this respect. In section 3, we propose an educational ontology which integrates LD specifications, following which we propose an OWL formalization of this ontology. We conclude in section 4 by summarizing our contribution and by listing our objectives in terms of further work.

1. Overview of Related Work and E-learning Technologies Standardization Efforts

In e-learning, ontologies are increasingly used to organize LD knowledge in authoring systems and LKMS [10] [11] [12] [13] [14]. In most cases, ontologies facilitate the referencing and the retrieval of semantically marked-up learning objects [10] [15]. The most valuable characteristics of ontologies in this respect are shareability, explicitness, and formalism.

Concurrently, recognized standard-initiating organizations have set forth the importance of sharing a common view of the educational field. In 2002, the European Committee for Standardization (CEN/ISSS) conducted a survey of educational modeling languages (EMLs) [16], in which the six existing EMLs were compared. Two distinct groups seemingly emerged. The first, consisting of CDF, LMML, Targeteam, and TML, restricts itself to the modeling of learning content and structure. These languages seem to ignore the existence of pedagogical models. The second consists of PALO and OUNL-EML, and this group lives up to the survey's working definition of EML: "*An EML is a semantic rich information model and binding, describing the content and process within "units of learning" from a pedagogical perspective*" [16]. The survey has shown that the expressive power of OUNL-EML exceeds that of PALO. The OUNL-EML [8] [17], now called EML, aims at providing a pedagogical meta-model. It consists of four extendable models which describe: (a) how learners learn (based on a consensus among learning theories); (b) how units of studies which are applicable in real practice are modeled, given the learning model and the instruction model; (c) the type of content and the organization of that content; and (d) the theories, principles and models of instruction as they are described in the literature or as they are conceived in the mind of practitioners. EML and its subsequent integration to IMS-LD has been to date the most important initiative towards integrating instructional design preoccupations in the international e-learning standardization effort [7].

IMS-LD [9] takes the EML information model as its base. For binding purposes, it is made compatible with the IMS specifications: CP, QTI, CD, SS [9]. The LD is positioned as the containment framework for all these specifications allowing instructional design (called "Learning Design" in IMS and henceforth in this paper) to be included into content packages. According to [9] "*A Learning Design is a description of a method enabling learners to attain certain learning objectives by performing certain learning activities in a certain order in the context of a certain learning environment. A learning design is based on the pedagogical principles of the designer and on specific domain and context variables*". In this definition, the place of educational theories in the LD specification is not clear. As a result, however, it underlines the importance of educational theories in the LD specification, since most of existing LD tools fail to explicitly integrate educational theories.

Indeed, the current learning technologies standards and specifications mainly focus on describing knowledge about learning design and content (e.g. LOM, Dublin Core, SCORM, CANCORE), thus offering only limited support to describe knowledge of the educational theories. Consequently, authors/learning designers cannot rely on assistance stemming from theories in their learning design process. Why are LD standards so limited? It may be because of the lack of representation of this theoretical knowledge as well as the lack of a compliance mechanism between these standards and this theoretical knowledge. Such a problem has been one of the concerns of the Learning Object Repository Network (LORNET) research network in Canada. LORNET is developing an authoring environment in the form of a LKMS compliant with IMS-LD standards; we believe that such an LKMS could benefit from providing authors with access to LD theories in order to enhance the quality of their design, and to improve their expertise. "*A taxonomy of pedagogies is a common request as this would enable people to search for learning designs according to the embedded pedagogy*" [17]. In order to thus make LD standards work with a representation of LD theories, a technical solution is needed.

2. Why linking LD Standards to a Representation of Educational Theories?

Assuming that the main user is an author/learning designer, this section introduces: the needs of an author for such a knowledge representation, the resulting services he/she can expect from an appropriate system, and how these services can be supported through the binding of LD standards to theories. Our goal is consequently to provide services whose specific purpose would be linked to consultation of theories, eventually linking such theories to learning designs based on those theories.

Some needs of the author using an authoring system, as suggested in [5] [18], are the following: (a) Query about which theories apply best to a specific LD, or about design principles related to theories; (b) Extract, (re)view and browse among theories in order to select LD strategies, or among templates of LD scenarios; (c) Review examples of good LD scenarios or principles in order to design a LD scenario; (d) Reuse or modify a template of LD scenario; (e) Validate (check consistency) among design principles.

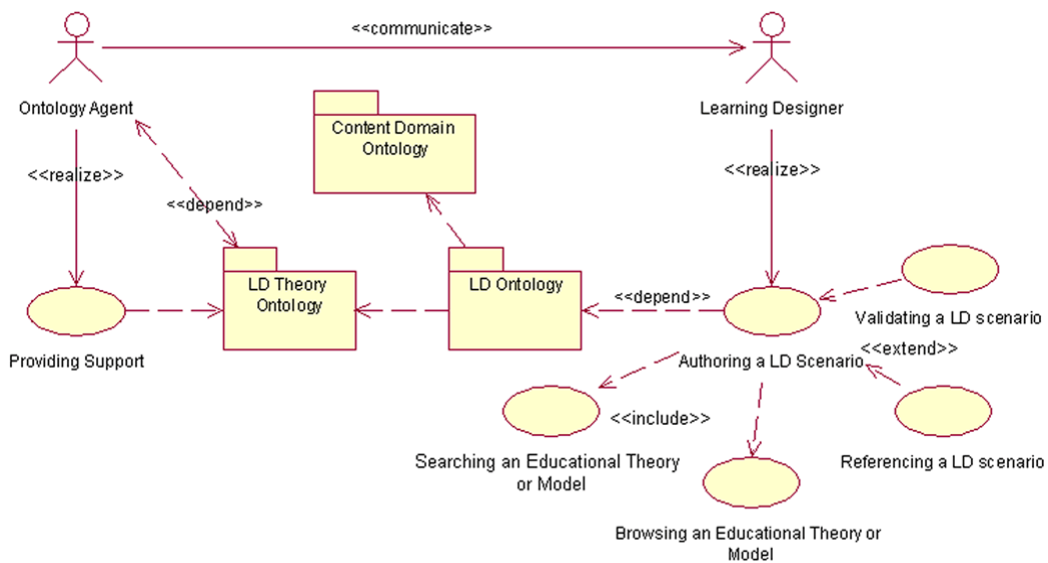


Figure 1. Main Use Cases and Provided Services

Table 1. Example of a Service: Searching a Theory

Use Case Goal	Perform a search to find a suitable theory	
Success End Condition	The suitable theory is found and provided by an agent.	
Failed End Condition	No input from the author or no matching theory.	
Primary Actor	User: Author / Learning Designer	
DESCRIPTION	Step	Branching Action
The author searches for appropriate theories for sequencing instruction that would map an LD activity structure in a particular LD scenario.	1	Author: wants to select a given type of instructional activity
	2	Ontology Agent: consults the ontology
	3	Ontology Agent: performs queries as to which theories could map the learning design activity
	4	Ontology Agent: outputs a list of suitable theories from the ontology
	5	Author selects a theory item in the list

Such a system should therefore assist an author in designing scenarios while improving expertise gained in LD. More specifically, this system should provide the following services [12]: (a) Assist the author in the selection of an appropriate LD method with regards to a scenario and encourage the application of a wide range of available LD methods when requested; (b) Inform this author about a particular LD method when queried; (c) Check and highlight errors in the authoring/design of a scenario when validation is needed/required. (d) Provide relevant examples. These services can be provided through a repository of LD scenarios [17] linked to a learning design ontology, as illustrated in Fig. 1. The LD ontology

itself consequently depends on the LD theory ontology and the content domain ontology (cf. section 3 for details). Fig. 1 also shows that searching, browsing, referencing and validation services are common requests. Some of these could be directly provided by a software agent to the author (searching, browsing), while other services (referencing, validation), could be provided through an authoring system or LKMS. Table 1 shows a detailed use case of a search that might be conducted by an author indicating the type of support potentially given by the agent.

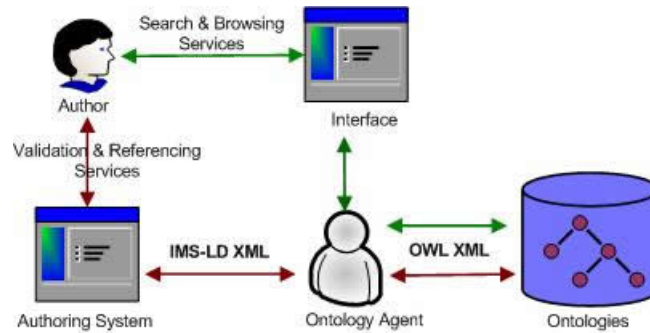


Figure 2. Interactions between Agent and Author during Authoring Process

Fig. 2 shows the interactions and flow of information between the agent and the author while providing those services. The possibility of using LD standards for other services [19] [20], is also explored. For instance, in the case of a validation service, an agent aware of the LD standards would be able to highlight errors or check the consistency of a scenario during the authoring process. This means that with a representation of the LD, an agent would be able to follow and assist the author in the process of authoring a LD scenario. This active assistance is possible only if the ontologies involved are well formalized given that the agent will need to query and reason about the elements within the ontology, which also explains why OWL is used (cf. section 4 for details). Clearly, an author would benefit from these services if the LD was linked to a representation of theories. We assume that the authoring system or LKMS used for indirect services is compliant with LD standards. On the basis of these hypotheses, we now propose how LD standards and LD theories could be connected.

3. Integration of LD Standards through Representation and Binding with Theories

This section describes the solution that has been developed in order to realize this integration: 1) an EML representation in the ontology, 2) a binding mechanism between LD and theories. As a preliminary to this discussion, we first elaborate on our OE methodology:

3.1. Methodology

Our methodology follows the three main steps of OE (before implementation): 1) analysis, 2) conceptualization, 3) formalization, followed by an evaluation [21] and documentation of the ontology.

- *Analysis of the domain.* This step was done by creating a glossary of terms, and includes the following tasks: (a) Identifying each the type of each term (Class, Properties, Individuals); (b) Adding an informal description for each term; (c) Adding synonyms and acronyms if available;
- *Conceptualization.* The conceptual modeling includes the following tasks: (a) Creating models of classes; (b) Creating *ad hoc* property models.
- *Formalization.* This step was conducted using Hozo [5]. For each class: (a) Add the subclasses in order to create taxonomies of classes; (b) Add predefined properties; (c) Add *ad hoc* properties; (d) Add comments (or annotations) if necessary; (e) Add axioms if

necessary. This is an iterative process, which stops once the ontology is stabilized. Finally;
 (f) Add individuals.

- *Evaluation.* This step [21] is performed during the conceptualization and formalization steps: (a) Verification: check (assisted by the editor) if the ontology is syntactically correct. (b) Validation: make sure (with domain experts) that the ontology correctly models the real world (domain) for which it was created.
- *Documentation.* At this stage, we document the ontology using OWL terminology: (a) *Creating a dictionary of classes.* For each class, indicate the: identifier, equivalent class, super and sub-classes, individuals, class property; (b) *Creating a dictionary of properties.* For each property, indicate the: name, type, domain, range, characteristics, restrictions; (c) *Creating a dictionary of class axioms:* indicate boolean combinations; (d) *Creating a dictionary of individuals.* For each individual, indicate the: individual name, type name, ObjectPropertyValue, DataPropertyValue.

3.2. An Ontological Conceptualization Compliant with EML & IMSL-LD

We argued previously that LD standards have a very limited connection to theories. Because IMS-LD [9] relies upon EML, we examined the EML meta-model [8] and how LD relates to theories in this meta-model. Fig. 3 shows that the “Unit of Study” is at its heart and relates to theories, to content domain and to learning models. In our view, ontologies could try to match this structure and we thus propose a structure consisting of three ontologies (Fig. 4), in which the “Learning Design Ontology” corresponds to the “Unit of study” and includes the “Learning Model”, while relating to the two other ontologies, the “Learning Design Theories”, and the “Content Domain” Ontology.

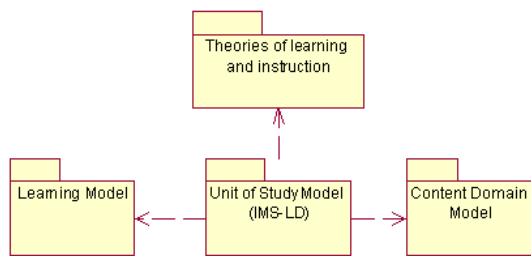


Figure 3. The EML meta-model

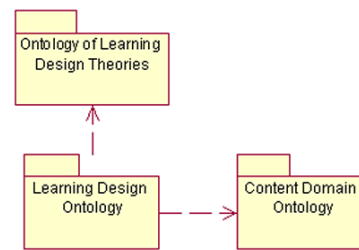


Figure 4. The resulting ontologies

This conceptualization builds upon the ontology of theories presented in [4], and takes into account the classes proposed by EML [8] and extracted from [22]. Classes for theories in EML are paradigm-based: “behaviourism”, “rationalism”, and “pragmatism-sociohistoricism”.

Table 2. Classes and Properties of the Ontology of Educational Theories

Classes	<ul style="list-style-type: none"> • Theory: theory of knowledge, learning theory, theory of instruction, ID theory; • Paradigm: Behaviourism, Rationalism, Pragmatism-Sociohistoricism (EML); • Learning Theory: Piaget, Bruner, Vytgosky, other; • Theory of Instruction: Inquiry teaching, Socratic, Algo-Heuristic, other; • Instructional Design Theory: Component Display, Elaboration, other;
Properties	<ul style="list-style-type: none"> • A theory of knowledge has a paradigm as one of its parts; • A theory of learning, instruction, and instructional design has a paradigm as an attribute; • A theory of learning, instruction, and instructional design has the following parts: <ul style="list-style-type: none"> ◦ theorist, concepts, principles, paradigm, content domain, reference, date; • Theories of learning, instruction, and instructional design rely on a theory of knowledge; • Models issued from a theory are extracted from a theory; • Models emerging from practice (eclectic) are extracted from practice; • Learning Designs are inspired by models.

learning designer in the process of authoring using an IMS-LD compliant tool will be evaluated in the following way: a mockup will represent the interactions between the agent and the human author, in the context of a real task. Three LD experts will judge the services' relevance, usefulness and meaningfulness.

Acknowledgments

Thanks to Ophélie Tremblay, Michel Leonard, Karin Lundgren, Ioan Rosca, Olga Marino and Gilbert Paquette (LICEF), and to Danièle Allard (Mizoguchi Lab.), for their advice or feedback. Financial support was provided by the Canadian National Science and Engineering Research Council, the LICEF Research Center and GDAC Research Lab.

References

- [1] Bourdeau J. and Mizoguchi R., "Collaborative Ontological Engineering of Instructional Design Knowledge for an ITS Authoring Environment," *ITS*, pp. 399-409, 2002.
- [2] Mizoguchi R. and Bourdeau J., "Using Ontological Engineering to Overcome Common AI-ED Problems," *Int. Journal of AI in Education*, vol. 11, pp. 107-121, 2000.
- [3] Mizoguchi R., Sinitsa K., and Ikeda M., "Knowledge engineering of educational systems for authoring systems design," *Euro AIED*, pp. 329-335, 1996.
- [4] Psyché V., Mizoguchi R., and Bourdeau J., "Ontology Development at the Conceptual Level for Theory-Aware ITS Authoring Systems.," *AIED*, pp. 491-493, 2003.
- [5] Bourdeau J., Mizoguchi R., Psyché V., and Nkambou R., "Potential of an Ontology-based ITS Authoring Environment: One Example," *ITS*, pp. 150-161, 2004.
- [6] Reigeluth C. M., "Instructional Theories in Action," LEA, 1993, pp. 343.
- [7] Paquette G., *Instructional Engineering for Network-based Learning*: Wiley-Pfeiffer, 2003.
- [8] Koper R., "Modeling Units of Study from a Pedagogical Perspective," 2001.
- [9] IMS Global Learning Consortium, "IMS LD, CP, QTI, CD and SS Specifications," <http://www.imsglobal.org/specificationdownload.cfm>. Last consulted, April 2005.
- [10] Recker M. and Wiley D., "A non-authoritative Educational Metadata Ontology for Filtering and Recommending Learning Objects," *Journal of Interactive Learn. Environ.*, vol. 9, pp. 255-271, 2001.
- [11] Psyché V., Mendes O., and Bourdeau J., "Apport de l'ingénierie ontologique aux environnements de formation à distance," in *STICEF*, vol. 10, Hotte R. and Leroux P., Eds.: STICEF, 2003, pp. 89-126.
- [12] Meisel H. and al., "An Ontology-Based Approach to Intelligent Instructional Design Support," *KES*, 2003.
- [13] Amorim R. and al., "An Educational Ontology based on Metadata Standards," *ECEL*, pp. 29-36, 2003.
- [14] Aroyo L., Inaba A., Soldatova L., and Mizoguchi R., "EASE," *ITS*, pp. 140-149, 2004.
- [15] Leidig T., "L3 Towards an Open Learning Envir.," *ACM Journal of Edu. Res. in Comp.*, vol. 1, pp. 7, 2001.
- [16] Rawlings A., Rosmalen van P., Koper R., Artacho M., and Lefrere P., "Survey of Educational Modelling Languages (EMLs)," CEN/ISSS WS/LT 2002.
- [17] Koper R. and Olivier B., "Representing the Learning Design of Units of Learning," *Educational Technology & Society*, vol. 7, pp. 97-111, 2004.
- [18] Nkambou R., Frasson C., and Gauthier G., "Authoring Tool for Knowledge Engineering in ITS," in *Authoring Tools for Advanced Technology Learning Env.*, Murray T. and al., Eds., 2003, pp. 93-138.
- [19] Psyché V., "CIAO, an Interface Agent Prototype to facilitate the use of ontology in intelligent authoring system," *Annual Scientific Conference of the LORNET Research Network*, 2004.
- [20] van Rosmalen P., Boticario J., and Santos O., "The Full Life Cycle of Adaptation in aLFanet eLearning Environment," *IEEE Computer Society LITC*, vol. 6, pp. 4, 2004.
- [21] Gomez-Perez A., "Ontology Evaluation," in *Handbook on Ontologies*, Staab and Studer, Eds., 2003.
- [22] Greeno J., Collins A., and Resnick L., "Cognition and Learning," *Handbook of Educational Psychology*, pp. 15-46, 1996.
- [23] Ertmer P. and Newby T., "Behaviorism, cognitivism, constructivism," vol. 6, pp. 50-70., 1993.
- [24] Mayer R. E., "Learners as information processors," *Educational Psychologist*, vol. 31, pp. 151-161, 1996.
- [25] Kearsley G., "Explorations in Learning & Instruction: The Theory Into Practice Database," 1994-2004.
- [26] Mizoguchi R., "A Step Towards Ontological Engineering," *12th Conf. on AI of JSAI*, pp. 24-31, 1998.
- [27] W3C Consortium, "OWL Specification Development," <http://www.w3.org/2004/OWL/#specs> Feb 2004.