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POLICY MATTERS

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ABSTRACT

What can leaders do to institutionalize innovations like distance education into naturally resistant traditional higher education? While instituting distance education remains challenging, literature suggests understanding and effectively using policy tools assists those leading and administering change processes. This study demonstrated policy matters, and examines policy pertinent to distance education endeavors. Presented as lessons learned, the review highlights the themes pertinent to policy as presented in literature including print and web accessible books, journals, research reports, dissertations, and information. The review culminates in a pragmatic list of questions presented for further research and discussion of a proposed distance education cooperative also provided. Though lessons learned are likely not completely comprehensive, they provide basic background in the concept of policy pertinent to leadership and administration of distance education within collegiate settings. As well, the review and discussion questions offer ideas to others also considering policy implications of distance education programs offered in cooperation with others.

ADMINISTRATION AND LEADERSHIP OF DISTANCE EDUCATION

Instituting distance education remains challenging but literature places the responsibility for leading and managing, the necessary change processes with institutional authorities. Though distance education accrues respect from students, employers, communities and societies, and the tools to offer it exist, not all colleges are offering it, or offering it equally as easily (Alfred, 1997; Bernard et al, 1998; Cunningham, 2002; Department of Education and Training, 2002a, 2002b; Epper & Garn, 2003; Kearsley & Moore, 1996; Mantyla & Woods, 2001; McNay, 1995a; Norris, 2003; Pan Canadian, 2001; Twigg, 2001 & 2003; U.S. Department of Education, 2000 & 2003). This situation gives rise to several important questions: Why does distance not naturally flourish in traditional education entities? Who can best assist its entry into higher education cultures? What can they do? How does one go about anticipating and preventing possible points of contention?

Distance education practitioners often attribute institutional disaffection to a seemingly natural state literature seems to validate. Reluctance to bring distance education, or for that matter any substantial innovation, into the core of higher education rests in a short six-letter word – change. Schon (1973) suggests human affinity for stability manifests in institutional behavior, and resistant behavior is a natural phenomenon: "Institutions are characterized by 'dynamic conservatism' – 'a tendency to fight to remain the same'" (p. 30). Schon (1973) explains the introduction of technology simultaneously introduces frequent and pervasive change that is inherently 'uniquely threatening to the stable state' (p. 26). Other sources explain the introduction of distance education necessitates change, not just for the student and teacher but also for the institution and its governance system: Moore and Kearsley (1996) articulate the challenge colleges seeking to institute distance education face as three deeply rooted problems:

- (1) A long-established academic culture that holds a firm view of teaching as an

individual's act in a classroom. (2) Power to change the system is held by senior faculty and administrators, most of whom are satisfied with the system that gave them power. (3) A rich array of technological and human resources is dissipated in a system of faculties, divisions, and departments, each of which guards its own interests. (p. 193)

Barone, Hawkins and Oblinger (2001) explain: "Success in the emerging distributed learning environment is likely to require different organizational structures from those that currently exist in traditional institutions" (p. 13). Kearsley and Moore (1996) extend the reach of inherent change to also include educational policy, administrative procedures and management:

Distance education pressures institutional structures, policy and administrative routines. The management of distance education institutions and programs is complex. At institutional, state, and federal levels, there is need for new policies to support the development of distance education programs, units, institutions, and consortia, and need for procedures for making such policies. ...The administration of a distance education program, unit, institution, or consortium embraces all the major events that support the teaching/learning process: Potential students must be informed about proposed courses. Students must be registered and enrolled. Fees must be collected and accounts kept. Decisions must be made on what courses to produce. The process of designing, producing and delivering course materials must be administered. Academics and administrative staff must be hired, supported and supervised. Instructional and counseling services to students must be administered. Student grades, diplomas, degrees, and awards must be issued. Study centers or facilities, equipment, and materials must be obtained and maintained. The effectiveness and efficiency of the program must be constantly assessed (p.172).

In addition to challenging traditional teaching practices, distance education calls for reforms in organizational structures, policy, administrative procedures and management. To the chagrin of traditionally governed institutions, distance education serves as the bugle call for announcing changes in the intimacy of relationships with peer organizations as well as simultaneous changes in internal operations. Fetzner and Gellman-Danley (1998) make a powerful statement about the importance of tackling and resolving the tough issues:

Asking the tough policy questions in advance can mitigate future bureaucratic problems and roadblocks. Most educators know that even a minor mid-stream policy skirmish can draw the focus away from their most critical concern – teaching and learning. Policies can provide a framework for operation, an agreed-upon set of rules that explain all participants' roles and responsibilities.

Faced with fitting, fixing or fleeing host structures endowed with policy largely formed in times

subject to different demands, constraints and choices, it is not surprising that distance education may naturally receive a chilly reception and face enormous pressures. Who should the practice call upon to lead efforts that open the doors of tradition to innovation?

Perhaps expectantly, literature suggests institutional authorities hold the responsibility for maneuvering their entities through the consideration and change processes. Morgan (1989a) calls for "transformational leadership... that goes beyond holding an organization together, to set it on a new course" (p. 163) as he identifies three programs of activity associated with transformational leadership: "creation of a vision. ...mobilization of a commitment. ...(and) institutionalization of change" (pp.164-165). Morgan (1989) and countless others (e.g., Benjamin et al., 1993; Bernard, et al., 1998; Caine & Caine, 1997; Cashman, 1998; Dede, 1998; Duderstadt, 1997; Evangelista, 2001; Lambert, 2003; Lewis, 2000, in Mantyla & Woods, 2001; Marzano, 2003) suggest transformational leadership necessary to institutionalize change, principally rests in leaders using their personal qualities and influence to engage and inspire others to work differently.

What then can, leaders and administrators do to institutionalize innovations like distance education in the naturally resistant traditional higher education settings? A review of literature offers for consideration insights on policymaking. While the report offered is likely not completely comprehensive, it provides basic background in the concept of policy pertinent to leadership and administration of distance education within collegiate settings. Following, the review of policy-related literature, the report discusses policy implications arising from a literature-informed analysis of a proposed regional distance education cooperative currently under consideration by the three Minnesota colleges. As well, the review and discussion questions offer ideas to others also considering policy implications of distance education programs offered in cooperation with others.

POLICY MATTERS

The scope of literature reviewed includes print and web accessible books, journals, research reports, dissertations, and information. While instituting distance education remains challenging, literature suggests understanding and effectively using policy tools assists those leading and administering change processes. Presented as lessons learned, the following review highlights the themes pertinent to policy as presented in literature.

Lesson Learned: Policy Describes, Directs, Explains

To discuss policy, one must first define policy. Several sources offer definitions and comments for consideration:

Policy is defined as a written course of action, such as a statute, procedure, rule or regulation, that is adopted to facilitate program development (Eich, King, Nugent, Mlinek & Russell, 2000).

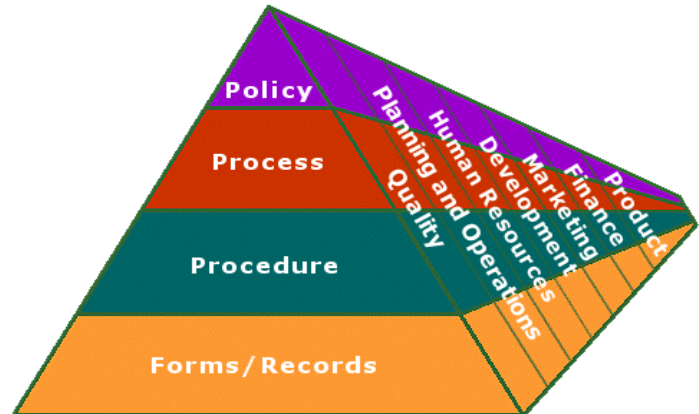
Organizations control the actions of individuals within them by making and enforcing policy. A policy is any authoritative communication about how individuals in certain positions should behave under specified conditions. ...An older notion reserved the term policy for major goals or far-reaching programs. According to this view, school boards, state legislatures, and Congress established policy, whereas school administrators simply carried out their wishes. Careful observation of the policy process, however, indicates that these distinctions are largely imaginary. Teachers, principals, and superintendents all make policy in certain areas. Even in implementing policy made by others, these key actors are often in a position to change the policy dramatically (Burlingame, et al., 1999, p. 230).

Making policy and ensuring it is followed takes a major effort on the part of an institution's management. To the extent that distance education is different from traditional classroom instruction, or involves the collaboration of different groups, or might divert resources of money and people's time from conventional methods, it will raise the issues that requires policies to be made not only within the institution, but also outside, perhaps at state or even national levels (Kearsley & Moore, 1996, p. 184).

Distance education policy is the written course of action adopted by institutions to facilitate development of the distance education programs (Albright, et al., 2003, p. 198).

Policy has a relationship with process, procedure and transactions as presented in Figure 1.0, a visual representation for one organization certified by the International Organization for Standardization (2003), Customized Training Services

Figure 1.0



(n.d.). Together, the outlined sources offer several ideas pertinent to policy.

Policy organizes organizations and serves as a direction-setting device for the work of the entity typically outlined in process, procedure, and transactions (e.g., forms). In effect, policy interprets social and political priorities to organizations and thus serves as the first step to engendering intention in action. Policy clarifies and communicates the values of the institution, most often in writing. Policy development may occur at a variety of levels (e.g., federal, state, institutional, etc.) and present itself in a variety of forms (law, regulations, institutional policy, etc.). For purposes of this discussion, policy presents itself in writing, becomes memorialized through some official adoption process, serves as the transparent framework for setting strategy on issues of importance, and institutionalizes practice as well as directs widespread change.

Lesson Learned: Policy Balances

Policy generally balances and bonds societal values with institutional practice, thereby becoming instruments expressive of institutionally adopted values. Value dimensions policy addresses include: equity, efficiency, choice and excellence (Burlingame et al, 1999, pp.11-13) or equity, efficiency, choice and quality (Burke & Minassians, 2002, pp. 51-57). Burke and Minassians (2002) associate potential policy topics with the various values, and suggest some

policies address more than one of the four values. (Refer to Appendix A, a modification developed from information presented on pages 51-57.) As explained in Burlingame, et al. (1999): Values and ideals compete with each other and cause policymakers at the various levels to set a balance between rule or mandates and empowerment (pp.11-13), or control and autonomy (pp.20-21) both between levels (e.g., federal, state, institutional) and within sub-divisions of a level (e.g., academic affairs, student affairs, and administrative services). As explained, when assessing values, one can legitimately consider what balance the policy sets between the generally important values of equity, efficiency, choice and excellence for the specific aspect the policy addresses.

Lesson Learned: Policy Mandates, Induces, Implements or Changes

The interplay between values and policy occurs in an environment of demands, constraints and choices. Stewart (1982 as cited in Burlingame, et. al, 1999) explains demands and constraints arise from external as well as internal pressures, and neither takes away all choice making:

Sometimes demands and constraints are imposed by legal mandates and requirements, budgetary limitations, community pressures, school outcome specifications, and role expectations of important others such as school board members, member of the business community, and parents. Sometimes demands and constraints come from within the school in the form of work rules, expectations of teachers, school organizational arrangements, union contracts, and the norms, mores, unwritten rules, and standard operating procedures that reflect the school's culture. Choices exist within any demand-and-constraint. Choices are opportunities... to do different things or to do the same things differently. ...However, there are limits (p. 1).

To understand opportunities and choices requires understanding demands and constraints defined by policy precipitating from within and outside the organization. Elmore and McDonnell (1987, p.134 as cited in Burlingame et al, 1999, pp. 4-5) explain policy makers and influencers utilize mandates, inducements, capacity building and system changing approaches to shape policy: "Mandates are rules and regulations designed to govern directly the choices and actions of educators and schools" (p.4). Policy mandates assumes legal or moral obligations compel

institutions to acting in a certain manner. This type of policy statement promotes compliance by expressly providing direction, underscoring the importance of compliance, communicating standards of compliance and explaining consequences of non-compliance. Conversely inducement oriented policy persuades institutions toward certain actions with enticement. As Elmore and McDonnell (1987) explain, "...inducements are the exchange of money and other benefits to educators and schools in return for desired choices and actions" (as cited in Burlingame et al. 1999, p.4). Inducement policy assumes capacity exists, complying to standards costs more, money elicits performance, and lacking financial incentive institutions will not or cannot activate capacity. Capacity building policy provides the sponsorship necessary to make investments in system development. As Elmore and McDonnell (1987) explain, "capacity building is the use of money and other benefits for the purpose of investing in human resources by building up educators' capacities to choose and act in desired ways (p.4). Capacity building policy assumes specific knowledge or skills are instrumentally important and only with appropriate investment will they be affordable. System changing policy seeks to shift influences and bring about desired choices and actions by the 'reallocation of power and authority among those involved in the process of schooling" (p.4). System-changing policy assumes existing institutions are incapable of responding to the situation, and a change in the locus of control is likely to produce the desired effects. System-changing policy generally incites defensive actions and raises concerns over possible problems the proposed solution may inherently create. Understanding policy types assists policymakers with aligning policy to the immediate situation, and vice versa.

Lesson Learned: Educational Governance Affects Institutional Policy and Policymaking

The values reconciliation process generally occurs through some form of governance, often, and as Morgan (1997) argues appropriately, under the influence of politics (pp. 153-213).

Sources indicate governing boards (often including ruling government, stakeholder and student representation), administration, and faculties are the main actors in educational governance (Brown, 2000; Braun & Merrien, 1999; Maden, 2000).

Central government is no longer supreme. The political system is increasingly differentiated. We live in a 'centreless' society in the polycentric state characterized (sic) by multiple centers. In place of a single sovereign authority there is a multiplicity of actors specific to each policy area (Rhodes, 1966, pp. 652-657 as cited in Maden, 2000, p. viii).

While some portions of the governance system are obvious, others may be transparent to observers. Governance implies roles for boards, faculties and administrations (Brown, 2000).

"While no two institutional charts are identical, there are congruencies regarding the context, function, and performance of higher education administration" (Braun & Merrien, 1999, p. 9).

Sources seem to agree, relative to institutional policy, most often boards draft and adopt policy, presidents direct the implementation, monitor compliance and effects, and advance improvements, and faculty influence development, implement policies and provide input on improvements.

Administration plays an important role in educational governance and are a key stakeholder in proposing, assessing, and implementing changes. Burlingame et al (1999) identify five critical responsibilities of administration (pp. 60-65): "maintaining cultural patterns... attaining goals ... adapting to the external environment... maintaining internal integration... (and) balancing core areas". Within these areas, administrators must possess the skills (technical, human and conceptual) necessary to implement administrative level processes (plan, organize, lead and control) (p.71). Berg (2002) shares research indicating top-level administrators and continuing education departments play key roles in authorizing and fostering distance education (p.102). Additionally, the study indicates "key administrative practices such as course approvals, course development, and assessment parallel traditional practices" (p.102).

The style of the educational governance system sets a process to produce policy decisions; the process is inherently social, political and important. Morgan (1997) emphasizes the importance when suggesting organizations exist to create order out of diversity and their means for reconciling the differences of individuals largely determines institutional vitality (p. 154). Burlingame, et. al. (1999, p. 225) emphasizes the important work of deciding setting substance (goals, strategic direction, resources allocation), the procedures to bring it about and the social and political nature of both:

Schools are political in the sense they, along with most other organizations, confront and respond to essentially political questions. What objectives should be emphasized? How will scarce resources, such as money or teaching talent be allocated among various programs? And in the memorable phrase of Harold Lasswell, “Who gets what, when and how?” (Laswell, 1958).

Governance generates the decision-making structure, defines and delegates authority levels, sets procedural requirements, and promotes a certain style of decision-making.

Policy styles and policymaking reflect governance approaches and the roles they predicate to actors. Numerous sources (Clark, 1983 & 1997; Huffner, 1984; Neave, 1984; Curry & Fischer, 1986; Becher & Kogen, 1992; Berquist, 1992; McDaniel, 1996) cited by Braun and Merrien (1999) indicate educational governance varies in its sensitivity to three primary forces: market influences, state inducement, and the academic oligarchy (Braun & Merrien, 1999, pp.15-29). The relative influence of these forces generates six typologies or forms of educational governance include: corporatist-statist, bureaucratic-etatist, bureaucratic-oligarchic, market, collegium, new managerialism (Braun & Merrien, 1999, pp. 22-29). Each of these forms of educational governance influences policy development and content differently. Because United States higher education generally aligns with the market typology although pockets of new managerialism also present themselves and, sporadically one finds other forms as well (Braun & Merrien, 1999; Maden, 2000), the two forms prompt further investigation.

In market and new managerialism systems of governance, market pressures, federal and state government and their extensions, and academia predictably accept certain roles pertinent to policy. Markets strongly influence both forms of governance, and typically, policy responds to the market pressures. For example, market influences pertinent to distance education include: perpetually advancing technologies; general movement toward a knowledge-based economy, increasing need for a more educated workforce, and escalating expectations to participate in continuing education, and louder call for more accessible higher education (Pan Canadian, 2001; U.S. Department of Education, 2000 & 2003); and, rising need for improving learning efficiency in non-traditional deliveries such as distance education (Berg, 2002; Brown, 2000; Draves, 2001; Mantyla & Woods, 2001; Sherry, 1996). Government interventions and inducements also affect policy. The effect of government ranges from control of, to supervision of, substance (goals) and/or procedure (policy) (Braun & Merrien, 1999, pp. 13-29): From a position of control to supervision, governments set educational policy and grant educational systems and member institutions various levels of policymaking authority. The academic oligarchy also influences policymaking as promotes the influence of faculty and their representatives in policymaking (Braun & Merrien, 1999; Maden, 2000).

The cascading role government dictates to agencies, and then agencies dictate to their respective component parts (e.g, virtual college, DE program, academic/student/technology divisions, academic department/program) influences policy. Braun and Merrien (1999) describe the role delegated by societies and their representative governments to educational systems and member institutions by the extent to which the mission assigned is one of service provision or one of cultural indoctrination (pp. 11-15). The act of assigning higher education its mission creates a hierarchical relationship and contract between government and the educational governance system.

In agencies assigned a cultural indoctrination mission, autonomy accrues when the subset entity (e.g., distance education) adequately performs its duty to produce and transmit new knowledge, and reinforces the culture to society (Braun & Merrien, 1999, p.11-12). In units assigned a service provision mission, autonomy accrues when the subset entity visibly demonstrates "...useful and applicable results linked to concrete social, political and economic goals and that they submit to an assessment procedure regarding their efficiency in terms of money input and output" (Braun & Merrien, 1999. p.13). In general, European countries and universities embody cultural indoctrination missions while colleges in United States are typically assigned service provision missions (Braun & Merrien, 1999, pp.11-13). The mission of the host agency and its relationship with the subdivision affect both policymaking and policy content.

Several additional sources (Braun & Merrien, 1999; Clark, 1983 & 1997, Maden, 2000) emphasize the important drivers play in shaping policy. The drivers recognized by these sources include: market influences, government influences (federal, state), and academic influences. They also agree that generally Europe is host to state- or academic oligarchy-driven institutions while the United States is host to mostly market-driven institutions. Though sources disagree about which driver does or should prevail, they agree each affect institutional structure, governance and policy.

Maden (2002) offers policy analysts and strategists a conceptual framework generated from a study analyzing educational decision-making operating in fourteen European countries (p. 19): The framework describes the decision-making system by field, level, and mode. Decisions occur across four fields (organization of instruction, planning and structures, personnel management and resources) and correlates with various levels of education (primary, lower and upper secondary, etc.) (p. 19). Additionally, decision-making systems address mode of operation expectations such

as “(i) full autonomy, (ii) in conjunction with or after consultation with bodies at another level and (iii) independently, but within a framework set at a higher level” (p. 19). The study notes the importance of using the framework as analysis tool to evaluate the alignment between intentions and implementations: “The detail of which types of educational decision have been decentralised (sic) – or centralised (sic) – is therefore an important exercise because it begins to reveal what lies beneath some high level rhetoric” (p. 22). Decisions can be made through a host of varying procedures. Lauglo (1990) provides an example of one procedure:

...there is first an exploratory diagnosis. Goals are set. Information is sought and received. Representations are made. Negotiations are undertaken. Proposals are formulated and appraised, anticipating the reactions of groups affected. New rounds of modification occur until the decision is reached (as cited in Maden, 2000, p. ix).

The institutional policymaking systems that sets decision-making approaches, results from governance; thus to understand any, one must understand the others.

Obviously, policy matters and its sweeping effects give merit to developing a thoughtful approach to both policy and policymaking.

Lesson Learned: Distance Education Needs Some Special Considerations

Distance education offers some interesting twists to policy and policymaking. All the novelty of distance education may lead one to believe every angle of it receives thorough examination and thoughtful planning. Several sources suggest this is not the case, and rather the opposite is true: "As institutions strive to provide quality alternative instructional delivery and enter the increasingly competitive race for new students, to areas often receive little attention – policy development and planning" (Fetzner and Gellman-Danley, 1998). A 1997 study by the Consortium for Educational Technology for University Systems offers similar information indicating technology generally preceded planning and policy development. What makes distance less likely to garner planning and policy development before implementation?

Several sources suggest distance education receives effects of more, more intense, and more dynamic market forces, and is not subject to slowing or settling. Rather, the only constant is change and transition, change and transition. Recent research indicates a need to implement a strong market-driven entrepreneurial response to supplying distance education. The Pan Canadian Advisory Committee for Online Learning (2001) and the U.S. Department of Education (2000) in "The power of the Internet for learning: Moving from promise to practice" both identify unmet market needs and challenge higher education to organize an effective response.

Literature suggests the effective response may likely include non-traditional entrepreneurial models. Twigg (2003) suggests when seeking an approach to increasing access and promoting economic development in any given state the following need emphasis:

1. Keep your focus on increasing access for new students (rather than on supporting institutions).
2. Find out what students and states need, and create a mechanism to respond (rather than aggregating what institutions have to offer).
3. Leave the resolution of long-standing higher education policy issues to state policy makers (rather than trying to solve them in the VUC [Virtual University]).
4. Create a business plan for self-supporting sustainability (rather than relying on state allocations).
5. Use a cost-effective development and delivery model (rather than a bolt-on model).

Two sources suggest understanding the distance education initiative in the context of important criteria assists with anticipating policy needs: The schema proposed by Johnstone and Wolf model (1989) considers four key indices to describe possible cooperative models: (a) degree granting intentions, (b) physical campus correlation, (c) centrally coordinated services, (d) articulated curriculum. The cumulative effects of these indicators result in four primary cooperative models pertinent to distance education:

Type 1: Virtual university – separate, degree-granting entity; no physical campus

Type 2: Virtual university consortium – no degree granted; but accredited academic institutions are linked online and supply centralized or coordinated services to students, with mutual articulation among consortium members

Type 3: Academic services consortium: no degree granted, but accredited academic institutions are linked online and supply centralized or coordinated services to students, with no articulation among consortium members

Type 4: University information consortium: no degree granted, not coordinated services to students, accredited academic institutions are linked online (Johnstone & Wolfe, 1989).

Epper and Garn (2003) offer a different two-dimensional taxonomy to specifically describe the agency-determined roles possible to assign distance education. (Refer to Figure 2.0). Their model identifies a relationship between the level of business practice and the intensity of centralization one could expect. Understanding the intended infrastructure of distance education and its purpose also assists in policy matters.

Figure 2.0

VCU Two-Dimensional Taxonomy

	Low business practice	High business practice
High centralization	<p><i>Central agency model</i> Provides central student services and academic articulation. Organizationally and financially embedded in an academic agency, such as a system office or coordinating board.</p>	<p><i>Central enterprise model</i> Provides central student services and academic articulation. May be organizationally embedded in an academic agency, but behaves as a business enterprise by building revenue streams for self-sustainability and engaging in quality control, performance measurement, standardization and/or benchmarking.</p>
Low centralization	<p><i>Distributed agency model</i> Provides electronic course catalog; little or no services; no articulation. Organizationally and financially embedded in an academic agency, such as a system office or coordinating board.</p>	<p><i>Distributed enterprise model</i> Provides central student services and academic articulation. May be organizationally embedded in an academic agency, but engages in limited business practices, such as quality control, performance measurement, standardization and/or benchmarking.</p>

Distance education appears more susceptible to non-traditional structures, new approaches to work, and redesigned decision-making processes. The entrepreneurial models lend themselves to different policymaking and policy content.

In addition to the tendency of implications from stronger market forces and alternative structures and processes, distance education introduces new pressures to existing policy. Albright et al. (2003), Berge (1998), Eich et al. (2000), and Fetzner and Gellman-Danley (1998) offer

policy frameworks for distance education. The following chart compares the four frameworks:

(Refer to Figure 3.0)

Figure 3.0

Strategic Decision Zones, Distance Education Policy Focuses, Key Issues

Albright et al. , 2003, pp. 199-204	Berge (1998)	Eich, et al. (2000)	Fetzner & Gellman-Danley (1998)
<p><u>ACADEMIC</u> :</p> <p>academic calendar, accreditation of programs, course quality, course and program evaluation, Carnegie units, grading, admission, and curriculum review and approval processes</p>			<p><u>ACADEMIC</u> :</p> <p>academic calendar, course integrity, transferability, transcripts, evaluation process, admission standards, curriculum approval process, accreditation</p>
<p><u>FACULTY</u> :</p> <p>compensation and workloads, design and development incentives, staff development, faculty support, faculty evaluation, intellectual freedom, and union contracts. In the category of legal policy, key issues</p>		<p><u>FACULTY</u> :</p> <p>rewards (e.g., stipends, promotion, tenure, merit increases, etc); support (e.g., student help, technical assistance, training, etc.); intellectual property (e.g., ownership of materials, copyright, etc.)</p>	<p><u>LABOR-MANAGEMENT</u> :</p> <p>compensation and workload, development initiatives, intellectual property, faculty training, congruence with existing union contracts</p>
<p><u>FISCAL, GEOGRAPHIC, GOVERNANCE</u> :</p> <p>tuition rates, special fees, full-time equivalencies, state-mandated regulations related to funding, service area limitations, out-of-district versus in-district relationship,</p>			<p><u>FISCAL</u> :</p> <p>tuition rates, technology fee, FTE's, consortia contacts, state fiscal regulations</p> <p><u>GEOGRAPHIC</u> :</p> <p>service area regional limitations, local versus out-of-state tuition, consortia agreements</p>

consortia agreements, contracts with collaborating organizations, board oversight, administration cost and tuition disbursement			<u>GOVERNANCE:</u> single versus multiple board oversight, staffing, existing structure versus shadow structure colleges or enclaves
<u>LEGAL:</u> intellectual property agreements, copyright, faculty, student, institutional liability			<u>LEGAL:</u> fair use, copyright, faculty, student and institutional liability
<u>STUDENT:</u> student support, academic advising, counseling, library services, student training, financial aid, testing and assessment, access to resources, equipment requirements, and privacy		<u>STUDENT PARTICIPANTS:</u> support (e.g., access to technology, library resources, registration, advising, financial aid, etc.); requirements and records (e.g., residency requirements, acceptance of courses from other places, transfer of credit, continuing education, etc.)	<u>STUDENT SUPPORT SERVICES:</u> advisement, counseling, library access, materials delivery, student training, test proctoring
<u>TECHNICAL:</u> system reliability, connectivity, technical support, hardware and software, and access	<u>TECHNICAL:</u> system reliability, lack of connectivity access, inadequate hardware/software, setup problems, inadequate infrastructure, inadequate technical support		
<u>PHILOSOPHY:</u> approach, organizational values and mission, and	<u>CULTURAL:</u> faculty or student resistance to innovation, difficulty	<u>MANAGEMENT and ORGANIZATION</u> tuition and fee structure funding	

vision statement	recruiting faculty or students, lack understanding of distance education and what works at a distance	formula; collaboration (e.g., with other departments, units, institutions, consortia, intra-and inter-institutional, service areas, etc.); resources (e.g., financial resources to support distance education, equipment, new technologies, etc.); curricula/individual courses (e.g., delivery modes, course/program selection, plans to develop, individual sequences, course development, entire program delivery, interactivity requirements, test requirements, contact hour definitions, etc.)	
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Selecting a framework or using a compilation of the various frameworks provides a focus for assessing policy needs.

COMPARATIVE PRACTICE IN POLICY MATTERS

An application of policy-related literature offers a beginning for framing distance education policy, and presents to distance education leaders and administrators a thoughtful approach for identifying policy needs and processes. It appears from policy defining literature when establishing, analyzing, or improving policy pertinent to distance education, one should seek to understand the context of policy and policymaking, as clearly, policy matters greatly not only to employees, stakeholders and students but to institutions and their governing bodies too.

Understanding the influences of markets, governments and academia on distance education provides useful context. For those considering the effects of policy on distance education, literature suggests also unearthing the value the policy intends to promote, and indicators it intend to convey, helps explain to students and stakeholders the purpose of various policies and improvement efforts. When leading or administering distance education, it seems important to identify policy elements shaping distance education by mandate, inducement, building of capacity, or changing of systems. As well, it appears important to understand the distance education experience may inform the making of the various policy types. From the literature review one also gathers: When considering distance education policy and policymaking one should ask, "What are the respective roles of boards, faculties and administrations?" Additionally important, one should seek understanding administrative orientations, and their respective responsibilities and influences upon distance education. Advisably, any movements to foster distance should incorporate top-level administration and maintain traditional routines in key areas. When planning processes, one should also understand their inherency to utilize, support, align or conflict with governance systems of the host institution(s). When analyzing policy impacts upon distance education it becomes important to know the culture or service role of the host agency, as well as the one it assigns to distance education. When considering distance education policy, understanding institutional-level drivers improves the probability of policy supporting institutions in meeting respective distance education expectations. Finally, clarifying the autonomy distance education has in policy matters also assists in forming a realistic approach to policy planning and implementation.

The following activity list offers a sequenced process for distance education leaders and administrators responsible for assessing and improving polices pertinent to distance education:

1. Identify driving influences from the market, government and academic oligarchy: What influences does each seek? What student needs emerge from each? Which influence most affect the host institution, the distance education movement?
2. Identify and clarify institutionally adopted values: What are the values of quality, efficiency, equity and choice, and respective standards to which the host institution must perform? To which, and to what extent, must the distance education movement contribute? (Refer to Appendix A)
3. Identify existing policies, as well as needs to address emerging expectations: What policy mandates must distance education consider? What policy inducements affect the host and/or distance education? From what capacity-building policy could distance education benefit? From what system-changing policy could distance education benefit?
4. Identify the respective roles of stakeholders to policy: What roles will boards expect to play? What roles will faculties expect to play? What roles will administrations expect to play? What other communities of interest expect to participate, and to what level do they envision their participation?
5. Identify and characterize the governance system of the host institution: To which of the six typologies does the host institution most closely align? What characteristics of governance incorporate distance education, and its typical needs? What characteristics conflict or diminish recognition of distance education and its typical needs?
6. Identify the mission assigned the host, and assigned by the host institution to distance education: Does the host institution sanction a mission of culture or service for itself? Does the host institution sanction a mission of culture or service for the distance education movement?
7. Identify the freedoms delegated to, and limitations placed upon, the distance education movement: In what areas is the distance education movement granted full autonomy? Autonomy after consultation with bodies at another level? Autonomy within a framework set at a higher level?
8. Identify market trends distance education faces: What trends appear near-term? Long-term? What policy implications exist?
9. Identify student needs: To what student characteristics (e.g., adult learner, onliner, consumerism, earn while you learn, etc.) does the host institution believe distance education should respond?
10. Identify the economic sustainability plan: What revenue stream does the host institution indicate will support the distance education movement? What expenditures will it accommodate?
11. Identify intended business practice and centralization: What business practices (e.g., revenue stream creation, self-sustainability, quality control, performance measurement, standardization, benchmarking) does the host institution expect distance education to

utilize? What centralization of services (e.g., student services, academic articulation, electronic catalog, etc) does the host institution expect?

12. Identify the enterprise model supporting distance education: What model (e.g., virtual university, virtual university consortium, academic services consortium, university information consortium) does the host institution intend for distance education initiative?
13. Identify the fit and shortcomings of existing policies, and the possible need for updating or creating new policies: What policies currently address academics? Faculty? Labor management? Fiscal? Geographic? Governance? Legal? Students and Participants? Student support services? Technical? Philosophical? Cultural? Management and organization? In what ways do policies in these areas fit and foster distance education? In what ways do policies conflict with, hamper or diminish distance education?

The recommended list of policy assessment questions provides to distance education administrators and leaders a literature-based background for assessing policy needs, and offers a potential method for informing development of a policy system or for integration of distance education within an existing policy system.

The recommended questions offer only a starting point to policy planners, and only after significant numbers of trial runs will questions prove their worth. (Distance education leadership from three Minnesota colleges will use the recommended questions to assess the policy implications of the proposed distance education cooperative. Refer to Appendix B.)

Should exercises get extended with quality management software, a visual display of the policy network and its relationship to the student experience can demonstrate for those policy responsibilities and other interested parties the connectedness or gaps in policy. However, even without the sweetness of the latest software, the questions produce the most important of policymaking and implementation – good old fashioned thinking!

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Appendix A – Performance Indicator Areas and Policy Value Reflections

Note: Modification of Burke and Minassaian, pages 51-57.

Chart 1.0

Policy Value:	Performance Indicator Areas:
Quality	<p>Academic program cuts. Acceptance rate. Accredited programs. Assessment of student learning. Class size. Course availability. Enrolled freshman. Enrollment of top students. Faculty availability. Faculty compensation. Faculty credentials. Faculty evaluation for all including tenured faculty. Faculty morale. Faculty national awards. Faculty publications. Faculty rank. Faculty resignations. Faculty, student evaluations. Faculty teaching lower division courses. Faculty tenure. Financial aid merit. Graduate satisfaction. Grade averages. Graduate student quality. Graduate student support. Graduates quantitative and writing skills. Graduates to advanced degrees. High school to college articulation. High school dual credit, course taking, advanced placement, grade point average. Institutional increase. K-16 collaboration. Library expenditure. License exam pass rates. Non-general fund operating support. Patents and licensure disclosures. Preparation of new students. Private fund raising. Program approval. Program review. Research sponsored, teaching and learning. SAT/ACT scores. Satisfaction of alumni, employers, faculty, students. Standardized admission test scores, general education exam scores. State capital spending, operating fund. Student advisement. Student-faculty ratio. Upper division grade point average. Students participating in research. Teacher training.</p>
Efficiency	<p>Academic program cuts. Administrative, academic costs, staff. Best management practices. Business services. Collaboration among campuses. Collaborative purchases. Cost of degree per student. Percent of population served. Course availability. Course completers. Degree attainment, attainment by annual earning, by employment rates. Degrees awarded by level, by criticality. Economic impact. Enrollment by criticality, by field, by degree level. Enrolled freshmen. Enrollment in non-credit. Enrollment trends. Expenditure per student. Facilities and grounds. Faculty workload. Foreign investment. Fund balances. GED pass rates. Graduation rates (3-6 years). Transfer students. Retention rates. High school to college articulation. High school course taking. Job placement, salaries and wages, by field. Job training contacts. K-16 collaboration. License exam pass rates. Mission focus. Non-general fund operating support. Privatization of functions. Public service. Remedial activity effectiveness. Research, economic development. Space utilization. State capital spending, operating fund. Student advisement. Student transfer, credit acceptance. Teacher average salary, employment. Technology distance learning. Time to degree, credits on graduation, transfers. Training administration. Workforce training.</p>
Choice	<p>Acceptance rate. Campus choice of mission specific indicators. Cooperative education, internships. Enrollment of campus. Enrollment status. Financial aid, loans. Graduates who participated in community service. Study abroad.</p>
Equity	<p>Acceptance rate. Adult basic education. College going rate, rate by race. College participation rate, rate by income. Degrees awarded by age, by gender, by race.</p>

	<p>Diversity of faculty/staff. Enrollment age. Enrolled freshman by minority, by gender. Enrollment in nontraditional, by race, by residence. Faculty age. Faculty compensation by gender. Faculty gender, race. Faculty tenure by gender, rank, race. Financial aid, loans. Graduate students with undergraduate degrees, with first generation college. Graduation rates (7-10 years). Retention rates by gender, minorities. Participation pre-colleges program of disadvantaged students. Executive management by gender, by race. Staff by gender, by race. Student transfer, by gender, by race. Teacher exam pass rate, by race. Tuition and fees, by family income. Undergraduate access.</p>
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Appendix B – Distance Education Cooperative (Proposal)

Proposal
Distance Education Cooperative

Recommendation:

Establish a joint venture “cooperative” to move distance education from an individual campus/college effort to a win-win consortium model

CONTEXT: The recommendation to establish a “cooperative” approach to distance education responds to the immediate needs of Minnesota State Community and Technical College (Detroit Lakes, Fergus Falls, Moorhead, Wadena), Northland Community and Technical College (East Grand Forks, Thief River Falls) and Northwest Technical College – Bemidji Campus. For the foreseeable future, the intertwined distance education programs and services of the former Northwest Technical College campuses need a way of interacting, as the former campuses become three separate and independent colleges.

In addition to addressing the needs of colleges named, the proposal responds to the interests of Minnesota State Colleges and Universities in fostering institutional cooperation, expanding access to education, and partnering with other higher education to meet Minnesota’s learning needs. As the cooperative forms, relationships with Minnesota Online, other prominent statewide movements, and regional providers, are and will remain strategically important. With respect to MnOnline and member colleges of the cooperative, the intent is not disconnecting either but uniting both, not duplicating efforts but connecting energies, not obstructing progress but bridging differences. As MnOnline grows and provides services, the cooperative work to make MnOnline successful, and will partner to transition to using pertinent services.

Concept: On a voluntary basis and as decided by each entity, institutions unite to meet their common needs and aspirations in distance education through a jointly commissioned enterprise – *the cooperative*, which exists to:

- 1) Leverage and build member capacity of member institutions
- 2) Provide member institutions with goods and services they need to produce and deliver quality distance education at lowest possible price
- 3) Use/foster the capacity of member institutions to provide the highest quality goods and services to students at the lowest possible price

Deliverable: Range of transparent services needed to deliver quality “virtual” collegiate experience for students seeking degrees or credentials

Objectives: The proposed cooperative assists in meeting member institution needs and resources relative to distance education into a service delivery plan

- a) Assist member institutions in achieving distance education strategic goals
- b) Use technology to increase capability, flexibility, sustainability, and scalability
- c) Establish services conducive to distance education culture and of benefit to member institutions.
- d) Coordinate functions provided by member institutions for student benefit.

Guiding Principles: Self-help. Self-responsibility. Democracy. Equality, equity and solidarity. Honesty, openness, social responsibility, and caring for others.

Characteristics:

Voluntary and open membership:

Open to all educational entities able to use the services and willing to accept the responsibilities of membership.

Member economic participation:

Members contribute equitably, and, share risks and control.

Democratic member control:

Equal voting rights (one member, one vote). Via the Joint Council of Presidents, member colleges/universities actively participate in setting policies and making decisions.

Autonomy and independence while partnering with others

Terms of agreements entered into with other organizations (e.g., government, other agencies, grantors, foundations, etc.) maintain control by the Joint Council of Presidents.

Public relations supported by education, training and information

Cooperative staff make concerted efforts to involve and inform member institutions in cooperative activities with the expectation to assist individuals at member institutions with their responsibilities to inform the general public, students enrolled into distance courses/programs, opinion leaders, and other key stakeholders about the nature and benefits of the cooperative.

Cooperation with others interested in distance education

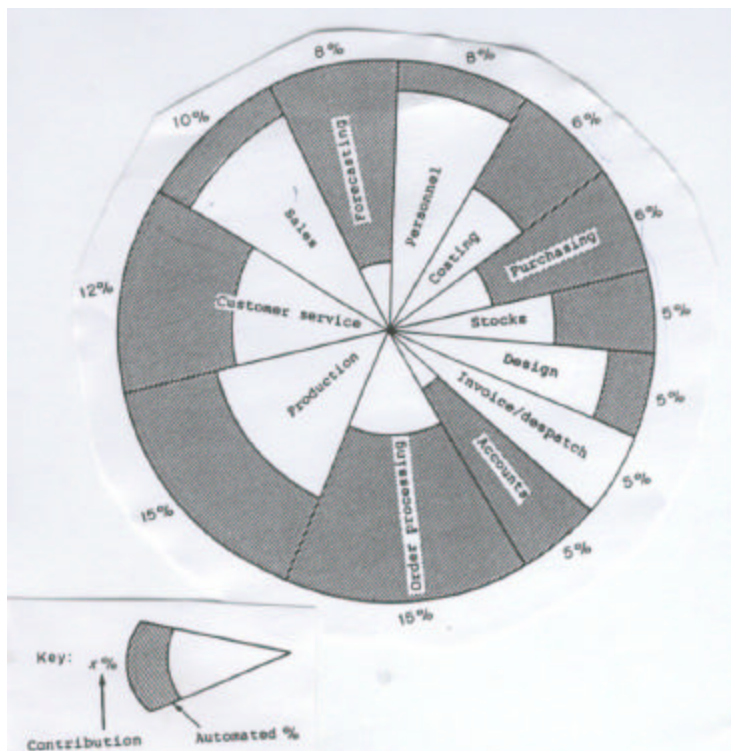
The cooperative willingly seeks out opportunities to work together with local, regional, state, national and international distance education entities and providers of goods and services to improve quality, reduce cost, and expand delivery of the cooperative's goods and services.

Concern for the distance education community

While working on member needs, the cooperative works for the sustainable development of distance education by establishing policies accepted by member institutions.

Figure 1

Relative importance of business activities & degree they are backed by technology and personnel:



Source: Griffiths, P., Ward, J., Whitmore, P. (1999).

I. Plan

A. Authorization and Administration System

Key Feature: Joint Council of Presidents

Scope: Sets strategy. Make policy. Determine priorities. Allocate resources. Hire/supervise the chief operating officer.

Intra-Agency Agreements: The agreements define the scope of cooperatively delivered functions, establishes a name for the cooperative, identifies a principle place of business, identifies the purposes and powers of the cooperative, proposes duration of the cooperative, and names founding members.

Operating Policy: Establishes, initiates and communicates

- The rights and responsibilities of member institutions pertinent to the cooperative and outlines daily operations of the cooperative (e.g., requirements for membership, rights and responsibilities of members, grounds and procedures for releasing members, procedures for calling and conducting membership meetings, voting procedures, procedures to elect or remove directors and officers, the number, duties, terms of office, and compensation of directors and officers, time and place of the directors meetings, dates of the fiscal year, information on how the net earnings will be distributed, other rules for management of the cooperative)
- Quality management and capacity building system that complies with accreditation, professional practice standards (e.g., Sloan-C Quality Indicators, MnOnline, etc.) and produces and uses data for decision-making
- Service delivery system and functions that collectively compose the major subsystems (*outreach/support, programs/courses, technology*) and culminate in the seamless shared distance education delivery system

B. Quality Management and Capacity Building System

Key Feature: Implementation staff serve at the pleasure of the Joint Council of Presidents

Scope: Implement directives as outlined in intra-agency agreements and operating policy. Provide feedback on performance measures.

Chief operating officer: The chief operating officer holds an systemic view, formulates recommendations, implements Council directives, and directs daily operations (1 FTE)

Contracted service agents: Service agents assist the chief operating officer in building relationships with member institutions and assist them with cross-functionally integrating and problem solving. Service agents include: distance technology manager, instructional designer, and administrative support (3 FTE)

Services:

Integration and implementation services to assist planning, implementation and delivery of academic courses and programs, outreach and support, and technologies

Technology management services for D2L conversion, implementation, coordination and enhancement; development, implementation, coordination and enhancement of web pages pertinent to distance education courses/programs, and incorporation, implementation, coordination and enhancement of program specific technologies

Instructional design services to assist production, implementation, coordination and enhancement of learning events (program, course, module, object)

Staff development services to orient faculty and staff to distance education, and provide them with continuing education in distance education topics

Assessment and improvement planning services to plan, implement, report and interpret on performance variables

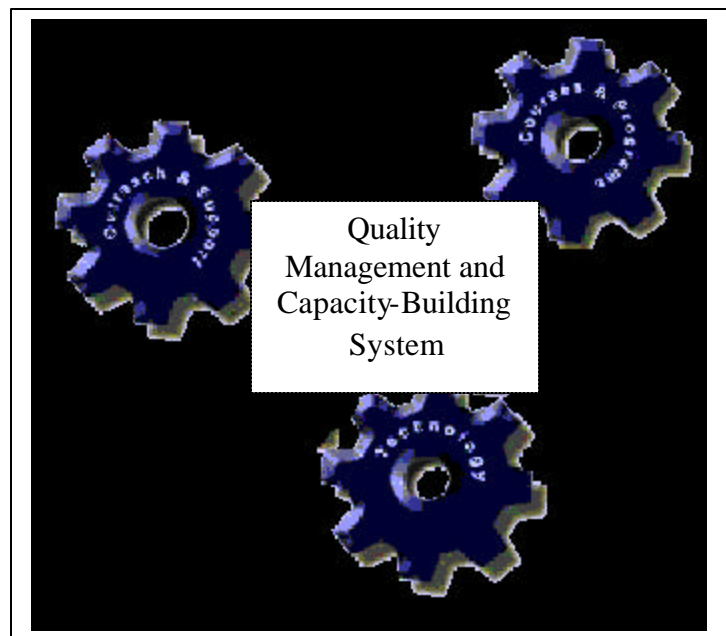
Research and development services to assist in assessment, design, development, testing, and evaluation of curriculum needed to fulfill member institution academic plans

C. Delivery System

Key Features:

(1) Process alignment in critical areas:

- Technology processes: Information technology/web
- Administrative processes: financial, human resource, personnel management
- Student outreach and support processes: Pre-admissions marketing. Career advising services. Enrollment services (applicant qualification, basic skills assessment). Disability services. Financial planning and financial aid services. Registration services. Academic progress review (SAP). General information. Problem-solving services, including appeals. Graduate follow-up, placement and alumni services.
- Academic processes: Aligned/articulated courses/programs. Coordinated curriculum development for online. Online program leadership and academic advising for degree seeking students by designated faculty. Coordinated schedule development and staffing for online. Library and reference services for online. Proctoring, testing, and tutoring services for online.



(2) Delivery though either:

- Centralized approach, OR Decentralized but coordinated approach, OR Coordinated centralized/decentralized approach

Scope: The cooperative aims to provide member institutions access to quality distance education goods/services pertinent to outreach and support, programs and courses, and technology at the highest quality and lowest possible price.

Possible shared services:

- Technology coordination services (I.T. and web)
- Administrative services (finance, HR)
- Call center services: Provide general information and perform the following: pre-admissions marketing, career advising, enrollment (applicant qualification, basic skills assessment), referrals to disability services, referrals to financial planning and financial aid services, registration, academic progress review (SAP), problem-solving consultations, coordinating student appeals, referrals for graduate follow-up, placement and alumni services. (Est. 3 FTE at \$105,000)
- Academic coordination services: Articulation initiatives. Accreditation assistance. General advising. Schedule development and staffing coordination. Library/reference support. Proctoring/testing coordination.

D. Financial System

Key Feature: The financial system responds to service requirements, quality standards, and member institution purchase of services.

Scope: The scope depends upon what components of the quality management and capacity-building system, and service delivery system the Council chooses to compose the cooperative system, and the various features of each sub-system. The financial system considers infrastructure, market rate tuition, MnOnline subsidy, shared operational liability, reimbursement for service provision and administration, etc.

Infrastructure: The Council determines resources necessary for a strong and efficient operation.

Tuition: Members establish uniform market tuition rates. Members collect respective revenues.

MnOnline payment: Members submit respective subsidy payments to MnOnline.

Operational liability: Members cooperatively fund operations. Colleges collect and disperse revenue generated in accordance with intra-agency agreements.

Service provision interests: Interest solicited by RFP (e.g., at the direction of the Council, the cooperative issues RFP's to solicit service candidates for functions of the delivery system such as market research, admissions marketing, student support services, student records, finance, bookstore, technology, library and reference, academic advising, faculty and curriculum support).

Service provision agreements: Council drafts/authorizes intra-agency agreements that outline relationships, expectations, and compensation.

Compensation for service based on cost plus 5% intends to cover direct costs, support indirect costs and motivate member institution supplying selected services.

Sources supplying a development or delivery component keep staff in their employ and remain responsible for supervision. Although supplying to the cooperative membership, employees of the contracted service do not become staff of the cooperative.

Contracts for services awarded are subject to board reauthorization annually pending performance qualification.

Service agreement administration: Cooperative coordinates with college staff to implement selected services as specified by intra-agency agreements.

Operational Expenses:

Quality management and capacity building system:

Estimated distance costs*:	FY04
Administrator Salary/Benefits	116,868
Admin Asst Salary/Benefits	45,580
Supplies and Equipment	20,000
Distance Tech Manager Salary/Benefits	93,133
Instructional Designer Salary/Benefits	50,700
Curriculum and Systems Development (R/D)**	80,000
<i>Total</i>	<i>406,281</i>

* Estimates include personnel (salary & benefits) & supplies/equipment. For planning purposes, assume annual 3% increase

** Projected estimate to provide research, design, development and delivery of curriculum (equivalent of 2-year major, 64 to 72 credits in length on alternating years), targeted service improvements, and seed money for grants to fund larger initiatives.

II. Next Steps and Timelines

Summary of development process:

July 2003: Presidents (MSCTC, NCTC, NTC -B) and Senior Vice Chancellor review and endorse general concept, and authorize further research/review (July 2003)

July – October 2003: Regional Alliance for Online Learning, a self-forming network composed of colleges and universities from mid-central and northern Minnesota, and MnSCU and MnOnline officers and staff, convenes and provides input and advisement. Participants encompass representatives from (list redacted)

September – December 2003: Regional Academic Leadership, composed of Provosts/academic officers from Minnesota State Community and Technical College, Northland Community and Technical College, and Northwest Technical College-Bemidji, convenes, provides input and advisement, disseminates conceptual plan to campuses and coordinates local reviews, and provides ongoing feedback and advisement.

January 2003: Frontline faculty and staff providing distance education and services, and their respective administration from Minnesota Community and Technical College, Northland Community and Technical College, and Northwest Technical College-Bemidji convenes to assess options and proposals, and to provide advisement.

Decision targets and timelines:

- February 1, 2004 Determine general framework/s
- February 15, 2004 Formalize strategy and model into official agreement/s (e.g., cooperative, 510C3, etc)
- March 1, 2004 Implement a strategic planning process/es (12 months)
- Establish operational framework (by March 15, 2004)
 - Monitor and integrate MnOnline development (ongoing)
 - Develop transition plans to migrate to new framework/s (by April 1, 2004)
 - Implement transition plans (on or before April 1 and until June 30, 2004)
 - Develop operational plans/policy (beginning April 1 and ongoing for first year)
 - Evaluate progress with external consultant/team (ongoing and through July 2004, and periodically thereafter)

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